

## Customer Experience (CX) Checklist

This CX Checklist is available for State Workforce Agencies' (SWAs) use to help improve CX in the Unemployment Insurance (UI) programs. This checklist is not an exhaustive list of considerations but builds the foundation for SWAs to focus on improving the CX. As SWAs make improvements in processes and updates to UI websites, applications, and content, states should revisit the items on the check list over time. SWAs should have staff from different divisions complete the checklist and compare answers in order to gain a full understanding of staff perspectives on progress.

A. Principles to Improve CX					
1.	Use Plain Language		Yes	No	Partially (if applicable)
a.	Has plain language been applied to the following items across the state's phone, web, and in-person service delivery systems?				
	i.	Pre-claim information (e.g., general state agency websites, chat box responses, phone lines, American Job Centers etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	ii.	Initial application forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iii.	Weekly certification forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iv.	Requests for information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	v.	Determination and appeals notices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	vi.	Overpayment instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	vii.	Overpayment waiver notices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	viii.	Overpayment waiver applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	ix.	Miscellaneous forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	x.	Informing individuals of the next steps in the claim cycle process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Does online content include helper text? (providing an explanation when a user hovers over a word or phrase)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	Are there videos to explain the unemployment process?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i.	If yes, do the videos explain the various steps and requirements at each key point in the claim process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	ii.	If yes, has plain language been applied to the videos?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Focus on action instead of information		Yes	No	Partially (if applicable)
a.	Are instructions presented in a clear manner on the SWA websites?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Are instructions presented in a clear manner on the different SWA applications?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	Are instructions presented in a clear and consistent manner in the different SWA's publications?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

d.	For notices sent to claimants and employers, do they clearly identify whether the recipient is required to perform an action?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e.	Are determination letters presented in a clear manner to indicate a favorable or non-favorable decision?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f.	Are determination letters presented in a clear manner to indicate how to appeal a determination and the deadline to submit an appeal?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g.	Are appeals notices presented in a clear manner to indicate how to respond to the notice and the deadline to submit a response?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Personalize the content	Yes	No	Partially (if applicable)
a.	Does staff understand the applicable privacy and disclosure laws in your state that inform the extent to which messages can be personalized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Has the SWA identified where personalized messaging can be implemented in the following?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i. Online system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	ii. Phone system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iii. In-person services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iv. Correspondences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	v. Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	Is communication sent to individuals in their preferred language where possible and/or when required by law?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Proactively and clearly state instructions to support navigation and wayfinding	Yes	No	Partially (if applicable)
a.	Is there a claim status tracker?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Does the claim status tracker or the UI system the SWA utilizes provide updates on the following?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i. Any outstanding issues requiring adjudication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	ii. Next steps in the claim life cycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iii. Critical messaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iv. Deadline reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Improve mobile usability	Yes	No	Partially (if applicable)
a.	Is UI content responsive to a variety of mobile screen sizes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Are stacking elements utilized on mobile sites?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	Are page lengths standardized for website content?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d.	Is white space utilized to help structure content?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e.	Are alerts used as a means of providing information that is relevant to most users?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f.	Are elements easy to tap on UI sites?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

g.	Are click-to-call options available on UI sites?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h.	Are font hierarchies implemented to help distinguish information requiring completion?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i.	Is text on sites set to wrap to fit various mobile screen sizes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j.	Is helper text functionality implemented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k.	Are the correct keyboards (numbers/alphabet) utilized when completing various fields in UI systems?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l.	Is auto format utilized to automatically apply correct formatting to information provided by users in UI system(s)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Provide appropriate digital off-ramps	Yes	No	Partially (if applicable)
a.	When experiencing an issue in a digital process, can users easily find a solution when seeking assistance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Are there non-digital ways for individuals to access general UI information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	Is information about alternative access options broadly and conspicuously disseminated in ways that individuals are aware of how to utilize them? (e.g., websites, phones, fliers, correspondences, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d.	Are there alternatives to verifying identity online?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e.	Are there non-digital ways to submit weekly certifications?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f.	Are there non-digital ways to respond to requests for information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g.	Do individuals have the option to choose if they want to receive information electronically or non-electronically?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B. Baseline CX Metrics				
1.	Operational Metrics	Currently tracked	Planning to track	Not tracked
a.	Percentage of completed applications (tracks the percentage of applications completed within a time frame)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Time it takes to complete an action with minimal error or staff intervention:			
	i. Initial claim	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	ii. Check status of claim	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iii. Weekly certification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	iv. Employer registration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	v. Employer wage report submission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	vi. Employer tax payment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	vii. Manage documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	viii.	Reset passwords	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c.	Call volume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d.	Call duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e.	Website clicks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f.	Video view counts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g.	Website outages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h.	Missed submission deadline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i.	First call resolution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	j.	Abandonment Rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	k.	First call resolution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	l.	Interpretation services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2.	Experience Metrics (can be applied to internal and external customers)	Currently tracked	Planning to track	Not tracked
	a.	Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b.	Satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c.	Timeliness (a process indicator to measure the customer's perception on how well a procedure, process, or operation is working)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d.	Ease: User friendly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e.	Ease: Readability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	3.	Outcome Metrics	Currently tracked	Planning to track	Not tracked
	a.	Number of errors in processes performed by internal and external customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b.	Number of calls per error/section of application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c.	Number of follow-ups required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d.	Number of in person visitors requiring assistance with routine processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e.	Click-through rate (measures the percentage of users who click on links or buttons on the portal that lead to other pages or tasks)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f.	Staff time saved on manual data entry or processing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g.	Improvement in first-payment promptness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C. Identify Areas for Continuous (Needing) Improvement				
1.	Conduct Direct Observation and Interview Studies	Currently used	Planning to use	Not used
a.	Focus groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Interviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	Usability testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.	Survey Types	Currently used	Planning to use	Not used
a.	Always-on surveys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Intercept surveys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	Ad-hoc surveys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>