



PUTTING CITIZENS FIRST: OPTIMIZING CUSTOMER EXPERIENCE THROUGH AI

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OPENING REMARKS

- CGFS supports the financial integrity of U.S. foreign operations across 275 posts in over 178 countries.
- Why AI and customer experience (CX) matter for government finance operations.
- AI is not just a technological leap—it's a human experience opportunity.

UNDERSTANDING THE PAIN POINTS

- Citizens experience the government through financial touchpoints: reimbursements, claims, disbursements, overseas payments.
- Common challenges:
 - Fragmented systems across bureaus and missions.
 - Manual, repetitive tasks slow down service.
 - One-size-fits-all interactions miss contextual needs.
- *For example, overseas employees dealing with housing reimbursements may face weeks of delay due to document processing and lack of transparency.*
- We must reframe government service through a citizen-experience lens.

WHAT AI-DRIVEN CX LOOKS LIKE

- AI is not a tool for automation alone—it's a strategic enabler for empathy at scale.
- Our vision: Citizens should receive accurate, timely, and tailored support—whether they're Foreign Service officers, retirees, or vendors.
- Key pillars:
 - Proactive support: anticipate needs before citizens ask.
 - Personalized services: tailored to role, history, and location.
 - Omnichannel availability: chat, email, portal, phone—AI supports all.
- AI amplifies our human capacity to serve, not replace it.

BALANCING INNOVATION WITH INTEGRITY

- Public trust is fragile. We must build AI that is:
 - Fair – doesn't reinforce bias (e.g., language, region).
 - Transparent – citizens should know when AI is used.
 - Accountable – human oversight is non-negotiable.
- Governance framework:
 - Data quality assessments.
 - Bias audits and explainability tests.
 - Feedback loops with end-users.
- The Department has developed guidance which adopts NIST's AI Risk Management Framework and OMB's AI guidance to ensure compliance and ethics.

WHERE AI IS MAKING AN IMPACT


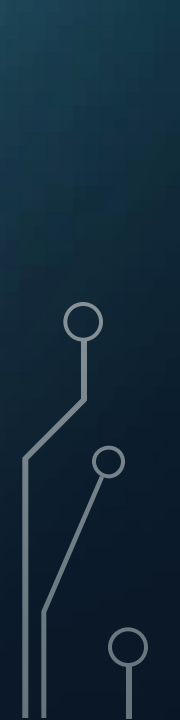
- **Conversational AI/Chatbots**
 - Deployed on MyServices or financial helpdesk platforms.
 - Handles Tier 1 FAQs on travel policy, per diem rates, and status updates.
- **Anomaly Detection & Error Resolution**
 - Algorithms flag duplicate reimbursements, unusual payment patterns.
 - Reduces financial risk and builds trust.
- **Natural Language Processing (NLP)**
 - Extracts key data from scanned documents
 - Cuts time to process from days to minutes.
- **Predictive Analytics**
 - Helps forecast peak support loads.
 - Enables better resource planning during Foreign Service bidding season or fiscal year closeout.

THE BACKBONE OF SMART EXPERIENCES

- AI is only as good as the data it's trained on.
- Challenges:
 - Legacy systems with inconsistent formats.
 - Siloed data across bureaus, embassies, vendors.
- CGFS Initiatives:
 - Launching a centralized financial data lake with real-time connectors.
 - Creating a unified data catalog across overseas posts.
 - Improving metadata standards for interoperability and discoverability.
- Example: Invoice, claim, and disbursement records can be linked using semantic metadata to enhance AI recommendations.


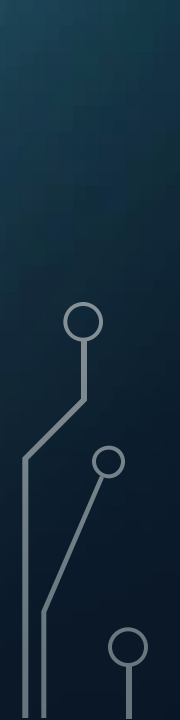


WE CAN'T DO THIS ALONE

- We're co-creating with:
 - Intradepartmental partners
 - Interagency partners
 - Industry partners via pilots and AI marketplaces.
 - The best innovations come from collaboration—not from isolation.
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LOOKING AHEAD: OUR AI-CX STRATEGY

- Scale AI chatbot to additional financial systems.
 - Launch AI training for financial officers and overseas staff.
 - AI-based error correction in claims processing.
 - AI-powered dashboards showing payment timelines and support status.
 - Multilingual NLP tools for global inclusivity.
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REDEFINE PUBLIC SERVICE

- AI gives us the tools to meet citizens where they are—with speed, empathy, and precision.
 - But success requires:
 - Human-centered design.
 - Ethical commitment.
 - Cross-functional collaboration.
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