

# On Pursuing IT and Digital Transformation at the U.S. Social Security Administration

*Perspectives from Marcela Escobar-Alava, SSA Chief Information Officer and Betsy Beaumon, SSA Chief Transformation Officer*

By Michael J. Keegan



Marcela Escobar-Alava, chief information officer, and Betsy Beaumon, chief transformation officer from the U.S. Social Security Administration (SSA) joined me on *The Business of Government Hour* to discuss the agency's ongoing transformation efforts, how they are working together to shape a new operating model delivering innovative digital services to the public. Our conversation covers topics such as digital modernization, process improvement, cultural change, customer experience, and employee engagement. The discussion provides valuable insights into the challenges and strategies associated with transforming a large, traditionally paper-based federal agency into a more agile and customer-centric organization.

The following is summary of the key themes and insights from our exchange, offering their perspectives on the work they do and the mission they support.

## IT Strategy

Escobar-Alava outlines the agency's IT strategy, emphasizing the digital modernization strategy as a "North Star" to guide transformation. The approach aims to expand service options, streamline internal processes, and modernize legacy systems. "Our IT strategy," explains Escobar-Alava, "is about modernizing our systems to improve service delivery, reduce technical debt, and enhance the customer experience."

A significant focus is on adopting a product operating model, using modular service principles, and leveraging artificial intelligence (AI) as an enabler for better customer service.



**Marcela Escobar-Alava**

Chief Information Officer  
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**Betsy Beaumon**

Chief Transformation Officer  
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SSA also aims to adopt cloud solutions strategically, with a focus on business processes and off-the-shelf tools that can simplify operations, particularly in areas like human capital management. “We’re also working very actively with the U.S. Digital Services with Office of Management and Budget to leverage the Technology Modernization Fund,” says Escobar-Alava.

**Challenges in IT Modernization**

Escobar-Alava discusses the issues faced since she took on the role, including a proliferation of applications resulting from a historically siloed, paper-based organizational structure. She refers to “Conway’s Law,” which suggests that the design of systems mirrors the organizational structure of the organization, as an apt description of SSA’s situation. Challenges also include “shadow IT” where decentralized teams have developed their own solutions, and as noted, substantial technical debt caused by decades-old systems. Addressing these challenges involves rethinking the organizational approach and implementing principles that prioritize customer and employee experience.

**Digital Modernization and Process Improvement**

Our discussion touched on SSA’s journey from a paper-based environment to a data-rich digital organization. One of the central goals is to move away from a paper-based environment and fully embrace digital processes. This includes reducing reliance on physical documents, enabling electronic signatures, and allowing customers to upload documents digitally.

By shifting to a digital-first approach, the SSA aims to streamline operations, speed up service delivery, and reduce the administrative burden associated with processing physical documents.

This transformation is driven by the need to simplify and standardize business processes, which had previously varied across different regions. “The strategic vision of

transformation,” describes Beaumon, “is really about how we can think differently about how we deliver services, how we engage with the public, and how we can use technology as an enabler.” Simplifying and standardizing processes across the organization requires significant effort, as it involves reevaluating existing workflows, consolidating systems, and ensuring that changes do not disrupt the agency’s ability to serve the public effectively.

For example, having disparate document management systems and processes designed around paper and wet signatures led to inefficiencies, requiring customers to submit documents in person or via mail, and introduced inefficiencies in processing. This created a fragmented experience for users and made process improvements imperative. A significant aspect of digital modernization is the focus on consolidating document management systems into a unified service that can provide seamless access to customer information.

The SSA’s efforts to streamline document submission and classification aim to enhance efficiency and reduce the burden on customers by allowing them to provide documents via their preferred channel. This shift will not only improve customer satisfaction but also reduce operational complexities



for employees. “We have a vision . . . it’s about putting the customer at the center of everything we do and also make sure that our employees feel equipped and empowered to do their jobs,” notes Beaumon.

### Cultural Change and Shifting Mindsets

Transforming an organization as large as the SSA requires more than just technological updates; it demands a cultural shift towards innovation and agility. Both Escobar-Alava and Beaumon discussed the importance of instilling a mindset of continuous improvement and encouraging employees to “embrace new digital tools and processes.”



Beaumon provided an example of the SSA’s approach to rethinking traditional processes, such as the need for signatures on forms. By reevaluating the risk associated with signature requirements, the agency was able to remove signatures from some forms, thus speeding up processes and reducing the “time tax” on customers. This change not only streamlines workflows but also demonstrates a commitment to considering the customer experience alongside legal and procedural requirements.

Escobar-Alava highlighted the agency’s efforts to train employees, foster open communication, and repeatedly share the vision for transformation. This approach is aimed at building understanding and support for the agency’s goals. While she acknowledged that shifting from a legacy mindset to a digital-first approach would take time, the steps being taken are setting a solid foundation for long-term cultural change.

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Marcela Escobar-Alava  
SSA Chief Information Officer

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### Balancing Innovation with Compliance and Risk Management

As a federal agency, SSA operates in a highly regulated environment with strict compliance and security requirements. Beaumon highlighted the challenge of balancing the need for innovation with ensuring that changes comply with regulations and do not introduce undue risk. For example, eliminating certain signature requirements sped up processes but also required careful assessment of the associated risks and compliance considerations. The need to adhere to federal regulations, such as data security standards, often adds complexity to implementing new digital tools and services, slowing down the pace of transformation.

### Vision for the Future: Simplicity, Agility, and Customer Delight

Looking ahead, Escobar-Alava and Beaumon shared a vision of an SSA that is simpler, more agile, and increasingly customer-centric. Escobar-Alava described a future where the agency has a smaller data center footprint towards a more cloud-based infrastructure, which would enable greater flexibility and faster responses to changing needs. She stressed the importance of shifting the IT budget from maintaining legacy systems to investing in growth and transformation initiatives. This shift would allow the agency to innovate more rapidly and deliver better services to its customers.

Both also outlined a future operating model where IT teams could be dynamically assembled to address emerging problems, thereby creating a more adaptable organization. This approach would ensure that the SSA remains capable of meeting new challenges and evolving its service delivery in line with the changing needs of its customers.

Beaumon added that her goal is for customers to feel delighted when interacting with the SSA, experiencing a sense of ease and empathy in every encounter. While acknowledging that not all processes can be made entirely seamless, she emphasized the importance of continuously striving to improve the customer

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experience. Beaumon’s vision aligns with the broader goals of digital transformation, aiming to make the SSA a model of efficiency and customer satisfaction in the federal government.

### Employee Involvement and Input

Involving employees in the transformation process is a key strategy for reducing resistance. The SSA is engaging staff at various levels to gather their input on new processes and systems. By including employees in discussions about changes, the agency helps them feel valued and invested in the outcome.

This approach not only helps to identify potential pain points early on but also allows employees to suggest improvements and take ownership of the transformation. Both guests mentioned a focus on listening to employee concerns and incorporating their feedback into the planning and implementation process. “Engaging with our customers and staff is critical; we want to ensure their voices are heard in the transformation process,” Beaumon says.

### Training and Upskilling Initiatives

To reduce resistance stemming from fear of new technology or processes, the SSA is providing training and upskilling opportunities for employees. Ensuring that staff members have the skills and knowledge they need to use new systems effectively can help alleviate concerns about job security or role changes. The SSA is also coaching staff on new digital tools and workflows to build confidence and competence. This investment in employee development helps foster a culture of continuous learning and adaptation.

### Emphasizing Benefits for Both Employees and Customers

Another key strategy is to emphasize how transformation initiatives will not only improve customer experiences but also make employees’ jobs easier. For instance, reducing the number of signature requirements on forms can streamline workflows and reduce the administrative burden on staff,

making their work less tedious. By showing employees the direct benefits of changes to their daily tasks, the SSA can foster more enthusiasm and willingness to adopt new practices. The focus is on creating a win-win scenario where both customers and staff experience the positive impact of transformation.

### Phased Implementation and Pilot Programs

The SSA is taking a phased approach to implementing changes, which helps to reduce resistance by allowing time for adjustment. By rolling out new initiatives gradually or starting with pilot programs, the agency can test and refine solutions before scaling them organization-wide.

This approach provides a lower-risk environment for introducing change and allows the SSA to gather feedback, address issues, and make improvements based on real-world experiences.

### Conclusion

The interview with Marcela Escobar-Alava and Betsy Beaumon showcases SSA’s commitment to transforming into a more efficient, customer-centric organization through digital modernization and cultural change. Their insights highlight the complexities of overhauling legacy systems, the importance of collaboration across the federal landscape, and the need to balance internal process improvements with a focus on user experience. By fostering a culture of innovation and agility, the SSA aims to deliver simpler, more effective experiences for its customers and employees alike, shaping a new model for service delivery within this agency.

You can listen to the complete version of my interview with Marcela Escobar-Alava and Betsy Beaumon, from the U.S. Social Security Administration at [businessofgovernment.org/interviews](https://businessofgovernment.org/interviews).