

## VA CUSTOMER EXPERIENCE

- 1. REASON FOR ISSUE:** This directive establishes policy, requirements and accountability for VA customer experience (CX) in accordance with [38 Code of Federal Regulations \(C.F.R.\) §§ 0.600-0.603](#), which defines Core Values, Characteristics and Customer Experience Principles of the Department of Veteran Affairs (VA). It delineates the essential components of an effective CX practice to be implemented nationally across VA.
- 2. SUMMARY OF CONTENT:** This directive establishes CX policy, requirements and accountability to ensure all Veterans, Service members, their families, caregivers and survivors receive consistent world-class experiences across VA.
- 3. RESPONSIBLE OFFICE:** The Veterans Experience Office (30). Questions may be referred to the Veterans Experience Office at [Vets-Experience@va.gov](mailto:Vets-Experience@va.gov).
- 4. RESCISSIONS:** None.

**CERTIFIED BY:**

**BY DIRECTION OF THE SECRETARY  
OF VETERANS AFFAIRS:**

/s/  
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## VA CUSTOMER EXPERIENCE

### 1. PURPOSE

- a. VA is committed to providing the best customer experiences in its delivery of care, benefits and memorial services to Veterans, Service members, their families, caregivers and survivors. In doing so, VA has established customer experience (CX) as a core capability in the Department, with the Veterans Experience Office (VEO) as VA's lead organization in CX.
- b. 38 C.F.R. §§ 0.600-0.603 describes VA's Core Values, Characteristics and Customer Experience Principles and serves as internal guidance for employees of VA. These principles define the responsibilities of VA employees, articulate what VA stands for and underscore its moral obligation to Veterans, Service members, their families, caregivers and survivors. They are intended to establish one overarching set of guidelines that apply to all VA Administrations and Staff Offices, confirming the values already instilled in many VA employees and enforcing their commitment to provide the best experiences possible to Veterans, Service members, their families, caregivers and survivors.
- c. In May 2019, VA amended 38 C.F.R. Part 0 to include § 0.603 VA Customer Experience Principles, therefore codifying CX as part of VA's Core Values and as the responsibility of every VA employee. VA measures CX through ease, effectiveness and emotion, all of which impact the overall trust the customer has in the organization. The regulation provides operating principles that guide the delivery of services and benefits to Veterans, Service members, their families, caregivers and survivors and commits that the Veteran experience should be smooth and easy where Veterans feel honored and valued in their interactions with VA.
- d. This directive establishes policy, requirements and responsibilities for VA CX to ensure all Veterans, Service members, their families, caregivers and survivors receive consistent world-class experiences across VA.

### 2. POLICY

- a. VA is committed to providing a world-class customer experience to Veterans, Service members, their families, caregivers and survivors with a Veteran-centered culture. VA recognizes that a positive customer experience leads to improved organizational performance, and therefore endorses the importance of hardwiring, scaling and sustaining CX capabilities at VA now and in the future. It is VA policy that all employees understand and are accountable for how their roles and responsibilities affect the customer's experience and to ensure every employee adheres to the Core Values, Characteristics and Customer Experience Principles of VA (see 38 C.F.R. §§ 0.600-0.603), to provide the best experience possible to Veterans, Service members, their families, caregivers and survivors.
- b. It is VA policy to implement CX as a core business discipline across the Department along three key pillars: applying CX core capabilities and

framework to service delivery and design; instituting CX governance to hardwire customer insights into VA strategy and decision-making; and implementing CX accountability to ensure that metrics are tied to organizational and individual performance, and budget decision-making.

VA shall institutionalize this CX mission into policy formulation and strategic, operational and tactical decision-making to deliver exceptional customer experiences for Veterans, Service members, their families, caregivers and survivors and empower employees with the tools to provide those experiences.

### **(1) PILLAR I: CX CORE CAPABILITIES & FRAMEWORK**

- (a) Based on industry and other best practices, VA established CX Core Capabilities and a [CX framework](#). This framework is built around two guiding principles: leverage industry and other CX best practices; and listen to and design service delivery around the customer.
- (b) Foundational enablers to these guiding principles are core CX capabilities that VEO provides to VA, including real-time CX data, tangible CX tools, modern, integrated multi-channel technology and targeted engagement. These capabilities empower employees to work collaboratively to deliver outstanding experiences to Veterans, Service members, their families, caregivers and survivors through actionable real-time CX data and predictive analytics, concrete CX tools, training and implementable practices, user-friendly technology and personal engagement with VA customers.
- (c) This CX framework, which begins with leveraging industry and other CX best practices, is coupled with qualitative customer insights captured through a human-centered design (HCD) process and is enabled by the core CX capabilities of data, tools, technology and engagement and is designed to drive improvements in service recovery and system-wide performance. This framework can be applied across VA and other Federal Agencies.
- (d) **Four CX Core Capabilities:**
  - 1 CX Data.** To maintain a view of VA's performance in CX, at least two levels of CX measurements are required through surveys: a VA-wide, Enterprise metric to understand CX globally across VA; and transactional metrics to understand CX by individual service line to perform individual service recovery and make actionable improvements system-wide. Both levels of CX measurement include Likert scale scoring and based on industry best practice, the transactional metric should, whenever possible, include free text boxes for

customers to provide open-ended compliments, concerns or recommendations specific to a service line experience.

A **VA-wide, Enterprise Metric:** This recurring VSignals survey allows Veterans, the public and VA to understand customers' overall trust in VA, as well as the ease, effectiveness and emotional resonance of customers' interactions with any VA business line. It provides a global benchmark of the VA brand and customers' perspectives on their relationship with VA.

B **Transactional Metric:** This weekly to monthly VSignals survey allows VA leaders, managers and other staff to access and understand compliments, concerns and recommendations that Veterans, Service members, their families, caregivers and survivors have when using VA services. This program also empowers VA employees with a predictive analytics capability to detect and clearly visualize trending topics before they intensify, and allows them to search data by topic, priority area, location, timeframe, age, gender, word search and other domains. A social media scraping capability is also included.

In addition to providing real-time CX qualitative and quantitative data, the strategic re-design of back-end business processes will also be considered to enhance both employees' and customers' experiences. Efforts in this area ensure the CX data, and new real-time and predictive capabilities this provides, are utilized for timely service recovery and system-wide performance improvements.

- 2 **CX Tools.** Based on the industry best practice of HCD and hardwiring CX data, VEO designs, builds and deploys tangible CX tools for VA employees to deliver great experiences for Veterans, Service members, their families, caregivers and survivors. These tools include employee training in CX (i.e., Own the Moment), leadership best practices, the VA Welcome Kit and other concrete products and programs that address specific pain points identified by Veterans through CX data and HCD insights.
- 3 **CX Technology.** To enable the delivery of effective Veteran experiences across multiple communication channels that are on par with industry standards, VA will drive integrated, Enterprise-wide technology initiatives through VEO. Such initiatives include integrated strategy and implementation of Contact Center Modernization, Digital Modernization and Enterprise Data Management. Both front-end (i.e., Veteran-facing) and back-end (i.e., employee-facing) systems and interactions will be addressed.

- 4 CX Engagement.** VA's direct engagement with Veterans, Service members, their families, caregivers and survivors delivered through local Community Veteran Engagement Boards (CVEBs), Federal advisory committees and strategic partnerships provides VA with listening channels and informational distribution channels to foster two-way communication. CVEBs, which have a national footprint, Federal advisory committees, and other strategic partnerships are all critical enablers for listening to Veterans and sharing information about VA programs, and can be leveraged across the Department.

## **(2) PILLAR II: CX GOVERNANCE**

- (a) To institutionalize CX at VA and hard-wire Veterans experience data and insights into VA strategy and decision-making, VA will leverage existing governance structures that are chaired at the Secretary or Deputy Secretary level, such as the VA Operations Board.
- (b) These existing governance structures, such as the VA Operations Board, enable VA leadership to assess CX program progress, resolve performance problems and focus on top priorities and problems while ensuring that VA is infusing CX data and insights into how VA addresses and resolves cross-cutting, Enterprise issues, including Contact Center Modernization, Digital Modernization and Enterprise Data Management. CX insights and business problems in need of resolution drive priorities, which are worked by matrixed subject-matter experts from Administrations and Staff Offices designated by the head of their respective organizations. Recommendations are ultimately provided to and decided upon by the Secretary, Deputy Secretary and other senior VA leadership.

## **(3) PILLAR III: ACCOUNTABILITY**

- (a) **CX Performance Metrics.**
  - 1 Organizational Performance Metrics.** VA will maintain the Enterprise and transactional metrics mentioned above. Additionally, VA will maintain organizational CX reporting requirements enumerated in the Office of Management and Budget's (OMB) Circular A-11 Section 280 – Managing Customer Experience and Improving Service Delivery.
  - 2 Individual Performance Metrics.** VA will continue to incorporate CX performance metrics into individual performance plans, including Senior Executives who oversee and manage direct care, benefits and memorial service delivery to Veterans, Service members, their families, caregivers and survivors. This ensures VA's alignment with

the spirit and intent of the OMB A-11 and provides another mechanism at an organizational and individual level for VA to hold itself and its employees accountable to Veterans, Service members, their families, caregivers and survivors.

- (b) **CX Budget Implications.** VA will also incorporate CX performance into budget strategy and prioritization. Specifically, in addition to balanced score card elements of operational, financial and personnel metrics, CX-related metrics such as ease, effectiveness, emotion and trust, will also be included as well. In doing so, customers will have a more active role in VA resource decision-making, ensuring resource allocation determinations are informed by what matters most to customers.
- (c) **Employee Experience Role in CX.** Employees who have a positive experience with the organization will be more engaged in supporting VA's mission, and that engagement translates into the delivery of excellent experiences to Veterans, Service members, their families, caregivers and survivors. OMB Circular A-11 § 280.3 highlights factors that influence CX, including the interaction with any employee. Every employee plays a role in creating positive experiences for customers, as such, employees will actively participate in promoting VA's Core Values, Characteristics and Customer Experience Principles. Employees may use the VA CX Framework (see Reference E) and Veteran Journey Map (see Appendix A) as guides to the Veteran experience.

### 3. RESPONSIBILITIES

- a. **Chief Veterans Experience Officer (CVEO).** The CVEO advises the Secretary on CX matters. The CVEO is responsible for this directive and for ensuring VEO:
  - (1) Develops VA policy and procedures for CX in conjunction with VA Administrations and Staff Offices and ensuring these policies and procedures are consistent and current with Federal law, regulations and VA strategic goals and plans.
  - (2) Provides subject matter expert consultation and services on best practices of CX and provides necessary guidance and resources to support the execution of this directive across VA Administrations and Staff Offices.
  - (3) Provides evidence based CX data, tangible CX tools, integrated, multi-channel technology and promotes engagement to support VA in improving CX.
  - (4) Ensures CX is a driver in VA strategic planning, performance improvement efforts, budget formulation, policy and other initiatives to improve the experience with VA care, benefits and memorial services.

- (5) Scales and sustains CX as a permanent, foundational and cross-cutting capability at VA, including through design and deployment of CX education, training programs, innovation and communication by working in collaboration with VA stakeholders and other partners.
- (6) Reviews and assists in the development of CX action plans on CX programs, initiatives and efforts. Effective action plans will clearly indicate goals, objectives, strategies and measurement necessary to achieve the initiative or effort.
- (7) Establishes a CX Institute (CXi) or other similar program in order to provide VA leaders and employees the ability to implement and share CX best practices to scale and sustain CX as a core business discipline at VA now and in the future.

**b. Under Secretaries, Assistant Secretaries and Other Key Officials.** Under Secretaries, Assistant Secretaries and Other Key Officials shall:

- (1) Deliver improved customer experiences by collecting, analyzing and acting on qualitative and quantitative CX data, perceptions and concerns.
- (2) Use CX data and insights to develop and implement action plans to improve the experience in coordination with VEO.
- (3) Promote the use of HCD methods and approaches to rapidly develop concepts and test them with users in order to ensure products, services and systems meet user needs.
- (4) Support employees by empowering them with the knowledge, skills and tools to provide outstanding experiences to Veterans, Service members, their families, caregivers and survivors.
- (5) Incorporate CX performance metrics into subordinate employee performance plans.

**c. Office of Management Deputy Assistant Secretary Office of Budget.** The Deputy Assistant Secretary Office of Budget shall incorporate CX performance into budget strategy and prioritization.

**d. Assistant Secretary, Office of Enterprise Integration.** The Assistant Secretary, Office of Enterprise Integration shall incorporate CX into Departmental strategic and plans and policies.

**e. Assistant Secretary, Office of Human Resources and Administration/Operations, Security and Preparedness.** The Assistant Secretary, Office of Human Resources and Administration/Operations, Security and Preparedness, shall incorporate CX performance metrics into employee performance plans, including Senior Executives who oversee and manage direct care, benefits and memorial service delivery to Veterans, Service members, their families, caregivers and survivors.

**f. VA Supervisors.** All VA supervisors are responsible for:



- (1) Supporting employees by empowering them with the knowledge, skills and tools to provide outstanding experiences to Veterans, Service members, their families, caregivers and survivors.
  - (2) Supporting implementation of CX best practices and utilizing CX data, tools and other capabilities to deliver outstanding customer experiences.
- g. **VA Employees.** All VA employees are responsible for:
- (1) Providing the best experience possible to customers.
  - (2) Demonstrating commitment to VA Core Values, Characteristics and Customer Experience Principles.
  - (3) Supporting implementation of CX best practices and utilizing CX data, tools and other capabilities to deliver outstanding customer experiences.
  - (4) Understanding for how their roles and responsibilities affect the customer's experience.

#### 4. DEFINITIONS

- a. **Best Practice.** Merriam-Webster defines best practice as “a procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption.”
- b. **Customer.** VA's customers are Veterans, Service members, their families, caregivers and survivors.
- c. **Customer Experience (CX).** Pursuant to 38 C.F.R. § 0.603 CX “is the product of interactions between an organization and a customer over the duration of their relationship. VA measures these interactions through Ease, Effectiveness and Emotion, all of which impact the overall trust the customer has in the organization.” CX is the customers' perceptions of their interactions with VA, to include access and the delivery of VA care, benefits and memorial services.
  - (1) **Trust.** Merriam-Webster defines trust as the “assured reliance on the character, ability, strength or truth of someone or something.” Trust is the publicly reported VA-wide through CX metrics made up of the following components: ease, effectiveness and emotion. It is measured by VEO through the use of surveys sent to customers with the statement, "I trust VA to fulfill our country's commitment to Veterans.”
  - (2) **Ease.** Pursuant to 38 C.F.R. § 0.603(a) ease is a measure indicating VA “will make access to VA care, benefits and memorial services smooth and easy.” VA employees excel in the dimension of ease when they ensure that services feel predictable, set expectations with Veterans and make sure they understand where they are in the process and what is coming next. Ease is measured by VEO through the use of surveys sent

to customers with the statement, “It was easy to get the care or service I needed.”

- (3) **Effectiveness.** Pursuant to 38 C.F.R. § 0.603(b) effectiveness is a measure indicating “VA will deliver care, benefits, and memorial services to the customer's satisfaction.” VA employees excel in the dimension of effectiveness when they ensure the delivery of a consistent, high-quality level of service for Veterans, within and across VA facilities. Effectiveness is measured by VEO through the use of surveys sent to customers with the statement, “I got the care or service I needed.”
  - (4) **Emotion.** Pursuant to 38 C.F.R. § 0.603(c) emotion is a measure indicating “VA will deliver care, benefits, and memorial services in a manner that makes customers feel honored and valued in their interactions with VA.” VA employees excel in the dimension of emotion when they strive to engage and connect with Veterans through personal interactions that demonstrate empathy, making them feel like they are valued and heard. Emotion is measured by VEO through the use of surveys sent to customers with the statement “I felt like a valued customer.”
- d. **Human-Centered Design (HCD).** The Lab at the Office of Personnel Management defines HCD as “a creative and strategic approach to solving challenging problems. The method puts people at the center of the problem-solving process. It takes into account behaviors, ways of thinking and people’s needs and aspirations.” HCD methods allow VA to rapidly generate and test new ideas while prioritizing people’s needs. Through HCD VA can improve products, systems and services by involving the human perspective in all steps of the problem-solving process.
- e. **Journey Maps.** Forrester Research, Inc. defines journey maps as “documents that visually illustrate customers’ processes, needs and perceptions throughout their relationships with a company.” Journey maps are developed through HCD research and present a common set of moments that matter most to customers in their experience and display bright spots and pain points as they interact with VA for care, services and benefits. Journey maps should be used in conjunction with quantitative data to prioritize Veteran experience initiatives and efforts. Journey maps will be utilized in the following manner:
- (1) Developing a shared understanding of Veterans’ experiences across VA.
  - (2) Identifying VA customer service gaps or bright spots along Veterans’ journeys.
  - (3) Recognizing where multiple VA services might touch Veterans simultaneously along their journeys.
  - (4) Focusing on moments that matter as junctures during which VA should design excellent customer service experiences and outreach opportunities.

- (5) Referencing life moments as starting points for generating new products or services.
- f. **Moments that Matter.** Moments that matter are key points that Veterans, Service members, their families, caregivers or survivors identify throughout their journey during which VA can build trust. These moments have a greater impact on the customer's overall experience with VA.
- g. **Multi-Channel Technology.** Multi-channel technology represents VA Enterprise-wide initiatives sponsored by VEO to create easy, effective and emotionally resonant experiences for customers and employees when they navigate VA. This program includes VA-wide Contact Center Modernization, Digital Modernization, Enterprise Data Management and other cross-cutting initiatives.
- h. **Performance Improvement.** Performance improvement is measuring the output of a particular business process or procedure, then modifying the process or procedure to increase the output, increase efficiency or increase the effectiveness of the process or procedure.
- i. **Service Recovery.** Service recovery is a fundamental element of VA's commitment to world-class customer experiences that empowers all staff to quickly acknowledge customer concerns, clearly communicate a plan for resolution and make things right, thus fulfilling VA's duty to Veterans, Service members, their families, caregivers and survivors. Service recovery is integral to VA culture; is considered everyone's responsibility and reflects an opportunity to turn a potentially negative experience into a positive one.
- j. **Veterans Signals (VSignals).** VSignals is a survey platform used to collect and analyze insights from Veterans, Service members, their families, caregivers and survivors. VSignals helps identify and inform opportunities for immediate and short-term service recovery and long-term program and systems improvement. VSignals measures CX through multiple layers, including:
- (1) the VA-Wide Trust Survey, which measures customer trust at the aggregate level;
  - (2) Service-Level Measurement Surveys (e.g., outpatient services, contact centers, appeals), which measure customer experience at the service level;
  - (3) Community Signals Surveys, which allow customers to submit feedback at any time; and
  - (4) Social Media scraping, which aggregates CX data on VA social media accounts.
- k. **Veteran.** The term "Veteran" refers to all VA's customers, including: Veterans, Service members, their families, caregivers and survivors.

## 5. REFERENCES

- a. [21<sup>st</sup> Century Integrated Digital Experience Act \(P.L. 115-336\)](#)
- b. [Foundations for Evidence-Based Policymaking Act of 2018 \(P.L. 115-435\)](#)
- c. [38 C.F.R. §§ 0.600-0.603, Core Values, Characteristics, and Customer Experience Principles of the Department](#)
- d. [Office of Management and Budget's \(OMB\) Circular A-11 Circular Section 280 – Managing Customer Experience and Improving Service Delivery](#)
- e. [VA CX Framework \(page 399\)](#)
- f. [Veterans Journey Map](#)
- g. Merriam-Webster definition of best practice: <https://www.merriam-webster.com/dictionary/best%20practice>
- h. Merriam-Webster definition of trust <https://www.merriam-webster.com/dictionary/trust>
- i. OPM Lab definition of HCD: <https://www.opm.gov/services-for-agencies/center-for-leadership-development/the-lab/>
- j. Forrester definition of journey maps: [https://go.forrester.com/blogs/10-02-10-mapping\\_the\\_customer\\_journey/](https://go.forrester.com/blogs/10-02-10-mapping_the_customer_journey/)

## **APPENDIX A: VETERANS JOURNEY MAP**

Not all Veterans are the same and there is no “one” Veteran. There are, however, a broad set of shared moments many Veterans will encounter and live through. Different Veteran personas will experience and navigate these moments in varied and disparate ways. Using this journey as a guide to organize and align around, VA can plan for and design better experiences for Veterans.

Life events impact individual goals and change priorities. Events like marriage, divorce, widowhood, birth of a child, obtaining a new degree, loss of housing, empty nesting, major illness and so on have profound effects on people’s priorities and how they approach their lives—as well as how they interact and perceive services. These events are unpredictable and may happen at any point across this journey.

The Veterans Journey Map covers ten life stages any Veteran may encounter, from pre-service to end of life. These life stages are organized in three phases in which Veterans’ goals and aspirations are distinctly different. Each life stage lists out moments Veterans typically experience and associated VA services, and calls out key moments that matter which may have significant impact on Veterans’ experiences. VA through VEO is committed to reviewing and refreshing journey maps as needed

The Veterans Journey Map is available at <https://www.blogs.va.gov/VAntage/wp-content/uploads/2020/02/Veteran-Journey-Map.pdf>