



# Toward a Veteran-Centered VA:

## Piloting Tools of Human-Centered Design for America's Vets

Findings Report, July 2014



U.S. DEPARTMENT OF VETERANS AFFAIRS  
CENTER FOR INNOVATION

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The VA Center for Innovation (VACI) is a team of innovators and doers within the VA who are dedicated to driving innovation at the largest civilian agency in the United States Government. The team at VACI does not believe in innovation for its own sake, but rather, in innovation that provides a tangible value to VA and to Veterans. The work of VACI is driven by a strong commitment to a Veteran-centered approach to service delivery, a dedication to data-driven decision making, and a commitment to design thinking.

Since 2011, VACI has worked to identify, test, and evaluate new approaches to VA's most pressing challenges. Balancing the practical with the aspirational, VACI enables a steady influx of high value innovations into the VA, moving them from concept to operational implementation.

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*The pilot was a lead by one of VA's 2013-14 Presidential Innovation Fellows. The Presidential Innovation Fellows (PIF) program brings the principles, values, and practices of the innovation economy into government through the most effective agents of change we know: our people. The program pairs talented, diverse individuals from the innovation community with top civil servants to tackle many of our Nation's biggest challenges, and to achieve a profound and lasting social impact. These teams of government experts and private-sector doers are taking a "lean startup" approach and applying methods like user-centered design to achieve results for the American people in months, not years.*

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## PROJECT TEAM

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## THANK YOU

Kate Krontiris, Independent Researcher  
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Adam Dole, Presidential Innovation Fellow, Health and Human Services

...and to the Veterans, families and community members who opened their homes, shared their stories, and offered us a glimpse into their experiences with the VA.

Respondents of pilot participated willingly. Names have been changed to anonymize data.

# Toward a Veteran-Centered VA

## Piloting Tools of Human-Centered Design for America's Vets

In the spring of 2014, the VA Center for Innovation conducted a formal Human-Centered Design (HCD) pilot to test a qualitative research phase of a design process as potential tool for use at the VA. This exercise explored Veterans' experience with the VA through the eyes of 40 Veterans across a range of demographics and locations.

The pilot had two goals:

- 1. To test the usefulness and application of a human-centered design methodology within the context of the VA.**
- 2. To better understand Veterans' experiences interacting with the VA, identify pain points in the present day service delivery model, and explore opportunities to transform these interactions into a more Veteran-centered experience.**

*"Human-Centered Design is the discipline of generating solutions to problems and opportunities...driven by the needs, desires, and context of the people for whom we design."*

LUMA INSTITUTE ON HUMAN-CENTERED DESIGN

### BACKGROUND

The Department of Veterans Affairs is entrusted with the mission of serving those "who borne the battle." To achieve this effectively and efficiently, VA must aim to be a service delivery system that is driven by the needs of Veterans. Yet realizing a Veteran-centered VA has proven to be a thorny challenge.

Time and time again, the voices of our customers--Veterans, their families, and those who care for them--are not integrated into our workflow or design cycles. The result is a VA that does not always align with or reflect our users' needs, values, perspectives, and preferences--and so our customers come away feeling overwhelmed, undervalued, or alienated.

We can and must do better.

With an interest in testing new approaches, tools, and methodologies that have the potential for enterprise-wide impact, VACI identified the methodology of Human-Centered Design as a potential approach for improving upon the VA's service delivery model.

HCD is an approach to product and service innovation used by some of the most successful companies across the public and private sector. With a demonstrated history of improving customer-satisfaction, VACI conducted this pilot to explore the potential efficacy of HCD research process.

The results of this pilot, summarized here and detailed further in this report, indicate to us that this approach offers a methodology which can help the VA design products and services with a richer understanding of the needs and experiences of our users.

This report will detail the HCD research pilot in its entirety, including methods, findings, and opportunities for the VA. Chapter 1 outlines the goals, methods, and profiles the community we interviewed.

### RESEARCH FINDINGS

Some of our findings surprised us, while others reinforced existing suspicions or understandings the VA has of Veterans. All findings underlined the need for a VA that excels in customer service.

#### UNDERSTANDING OUR USERS

Our research surfaced themes about the needs, perceptions and expectations of Veterans we serve. These observations can serve as a guide across the VA for the development of products, programs and services that better meet the needs of Veterans and their families.

1. Veterans often approach the VA with preconceived ideas and low expectations.
2. Poor service delivery feels like disrespect.
3. One bad experience will turn Veterans off for a long time.
4. Veterans want follow through, follow up, and a personal touch.
5. Veterans share many of the same desires as customers of any other service.

The details of these findings are presented in Chapter 2: Meet VA's Users. In this chapter you will also find the profiles of four customer personas, along with suggestions for design considerations for meeting our user's needs.

#### VETERAN EXPERIENCE OF THE VA

Veterans are generally grateful for and happy with the quality of VA services. However, it is the experience of trying to access those services — unanswered phone calls, long wait times, confusing websites, overwhelming written materials — which leave Veterans feeling frustrated and underserved.

This lesson was informed by three key insights that were derived from the stories and experiences of the Veterans we spoke with:

INSIGHT 1:

Veterans often feel overwhelmed, confused and unable to navigate their VA services.

INSIGHT 2:

We need to be smarter about when, how, and with what frequency we reach out to and engage Veterans.

INSIGHT 3:

There is a lot of good happening, and we need to play off of what is working well.

These findings are further detailed in Chapter 3.

### DESIGN METHODOLOGY LESSONS

#### A POWERFUL APPROACH WITH OPPORTUNITY TO SCALE

While there is no single solution for ensuring Veteran satisfaction, our pilot indicates that Human-Centered Design can help the VA operate with a deep understanding of the wants, motivations, and needs of our customers.

Consistent application of user-centered approaches as a core principle throughout our operations can help the VA deliver the positive and valuable experience that our Veterans deserve. HCD embodies many of the practices and values that we believe will help VA deliver the Veteran-centric experience to which we aspire, meeting baseline expectation of Veterans, our leaders, and the American public.

The methodology is referenced throughout the report and profiled in detail in the subsequent pages. A review of the pilot as well opportunities for further exploration are outlined in Chapter 4.

# What is Human-Centered Design?

*“A human-centered approach to innovation draws from the designer’s toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success.”*

TIM BROWN, IDEO PRESIDENT & CEO<sup>1</sup>

## DEFINITION:

*“An approach to systems design and development that aims to make interactive systems more usable by focusing on the use of the system and applying human factors/ ergonomics and usability knowledge and techniques.”*

INTERNATIONAL STANDARDS ORGANIZATION<sup>2</sup>

## WHY HCD:

*“Rather than requiring users to adapt their attitudes and behaviors in order to learn and use a system, a system can be designed to support its intended users’ existing beliefs, attitudes, and behaviors as they relate to the tasks that the system is being designed to support. The result is a product that offers a more efficient, satisfying, and user-friendly experience for the user, which is likely to increase sales and customer loyalty.”*

USABILITYFIRST.COM<sup>3</sup>

Human-centered design (HCD) is a discipline in which the needs, behaviors and experiences of an organization’s customers (or users) drive product, service, or technology design processes. It is a practice used heavily across the private sector to build a strong understanding of users, generate ideas for new products and services, test concepts with real people, and ultimately deliver easy-to-use products and positive customer experiences.

HCD is a multi-disciplinary methodology which draws from the practices of ethnography, cognitive psychology, interaction and user experience design, service design, and design thinking. It is closely tied to “user-centered design,” which applies parallel processes to technology projects, and “service design” which address the service specific experiences.

## What HCD is...

A PROCESS FOR DELIVERING INNOVATION IN USER SATISFACTION.

Organizations both small and large gravitate toward processes which prioritize business needs. This often means that they design and build products that reflect their own institutional requirements and general assumptions about users. Often products and services aren’t shared with users for feedback until late in the process, or after launch. At this point, it becomes very difficult to accommodate user feedback, and we find that a great deal of time and resources may have been put toward solving the wrong problem entirely.

Human and user-centered design projects, on the other hand, are defined by a series of phases, in which specific activities take place to continuously understand and gauge the needs and reactions of users throughout:

### DISCOVER + DEFINE

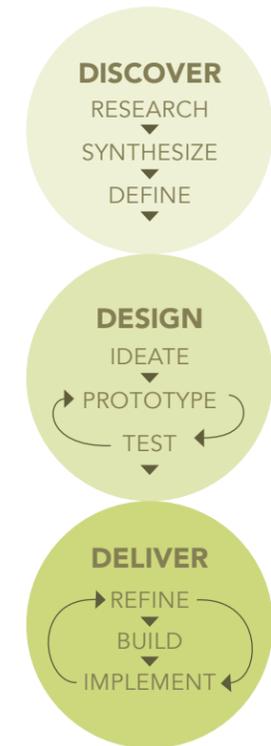
*Conduct user research and synthesize findings to define user needs and problem statement.*

### DESIGN + TEST

*Potential solutions are generated, ideas are translated into prototypes and tested against users, then refined to prepare for implementation.*

### DEVELOP + DELIVER

*Architect and build new services or products in agile increments, releasing new user-facing changes in ways to continue to refine based on user feedback and testing. After launching a complete service or product, continuously monitor and refine to meet user satisfaction.*



## A MULTI-DISCIPLINARY PRACTICE WITH ROOTS IN ENGINEERING + PRODUCT DESIGN

Human-centered design has evolved out of disciplines which have sought to design in ways that better serve people. Its origins date back to the 1940s, when human factors engineering and ergonomics fields initially emerged to design airplane cockpits which accommodate the shape and movements of the human body. By the mid 1960s, the study of physiological ergonomics had paved the way for cognitive psychology to explore the ways of designing for human memory, sense and deductive reasoning.

During this same period, the public sector saw the advent of ‘participatory design,’ a practice employed in urban planning and civic institutions to engage citizens alongside government and business leaders in shaping public spaces and policy.

Throughout the ‘70s, ‘80s and early ‘90s, software innovation in academia and private industry evolved these disciplines to focus on technology needs, cementing the practice of ‘human-computer interaction.’

This evolved into the now-common place disciplines of user experience and interaction design are employed.<sup>4</sup> By the late 1990s, companies such as Apple and IDEO were practicing contextual design, which employed ethnographic studies into the design of digital and physical products alike.

Since the early 2000s, public and private sector organizations broadened this practice and adopted what we now know as human or user-centered design for the design of both digital and in-person services, tools, systems, and experiences.<sup>5</sup>

# What HCD is not...

## A SINGLE SOLUTION.

Human-centered design does not account for all factors involved with designing systems, services, and products. It is intended to surface and account for the needs of users, which must be balanced with the constraints of technology, budget, timelines, and stakeholder interests.

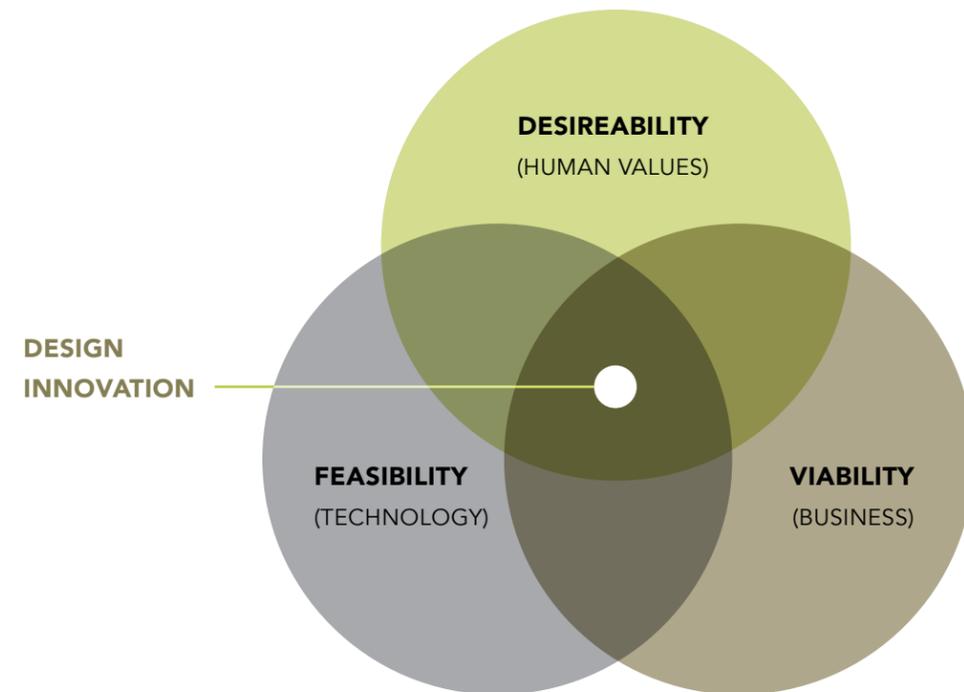
It is a tool intended to put the users at the table with key decision makers, prioritizing user needs among the determining factors driving any product or service project.<sup>6</sup>

It is by no means the only kind of research we need to do to understand our users. Human-centered design research intentionally surfaces ‘thick’ data over ‘big data,’ which is to say: it takes small numbers of users (between 20 and 100) and delves deeply into their human needs, desires, motivations, and behaviors.

Where quantitative studies often draw from large sample sizes to uncover statistically significant data, and focus groups and online feedback forms gather customer opinions, ethnography and design research are intended to complement this information with a deeper understanding of the nuanced and complex lives of customers.

Organizations like the VA historically lean heavily on quantitative data, thus missing the opportunity to see how users behave in their native context, hear the language they use in their daily lives, and understand the mental models they carry when accessing our services.<sup>7</sup>

Finally, HCD is not a replacement for agile technology development process--it is a complementary process which often leads into agile development. HCD doesn't prescribe a development methodology, but instead advocates for iteration and the user validation also prioritized in agile sprint cycles.



STANFORD D.SCHOOL FRAMEWORK FOR DESIGN INNOVATION

## EXAMPLES OF HCD IN PRACTICE

**Capital One** has created a new Capital Labs division dedicated to incorporating HCD methods into product innovation, citing it as their “go-to method for building the products and experiences that our customers need.

This human-centered methodology, coupled with a “fail fast” attitude, allows Capital One to “quickly identify, build, and test our way to success.”<sup>8</sup>

The **United Kingdom** has incorporated a comprehensive user-centered design practice to the design and delivery of all of government digital services.<sup>9</sup> Due in large part to this dogged emphasis on identifying and designing for citizen needs, the UK has collapsed all of their federal websites into a single digital platform—gov. uk—which allows users to register to vote, pay their taxes, apply for a driver license, government benefits and more on a single page.

**Kaiser Permanente** has received numerous accolades for its design and service innovation in health care delivery. In 2003, with the assistance of Silicon Valley’s leading user-centered design agency IDEO, KP created a dedicated internal innovation group, tasked specifically with exploring the applications of Human-Centered design in healthcare settings.

The team has produced significant successes for its parent company, including an initiative to reduce medication errors which has saved KP \$965,000 in its first year and increased employee satisfaction and patient peace of mind.<sup>10</sup>

### HUMAN-CENTERED DESIGN TOOLS

Throughout the report we will highlight examples of design activities in practice during this pilot, with overview of the definition and function of those tools.



## CHAPTER 1

# A Pilot in Design Research at the VA

The ways in which people come into contact with VA services, as with any other service, are defined by small moments which build or breakdown trust, that embrace what we have to offer or create distance. They foreshadow relationships to come, and define the value our users — America's Veterans and families — will expect from their VA experience.

As a service-delivery government agency, unlike comparable service providers in the private sector (like banks, insurance companies, or health care providers) the VA does not compete for the business of our customers. As a result, we may take for granted the loyalty of our customers and miss the opportunity to understand their core needs and motivations.

From within our organization, we cannot fully understand what it feels like to approach our services. We are acquainted with the acronyms, we know the business lines and service offerings. We may think a sign is clear or that a form makes sense. Yet we, the dedicated people who deliver vital services to Veterans, cannot fully grasp what it feels like to access these services — unless we ask.

So we decided to get out of the building and speak with the users of our services: Veterans and their families. Using the research tools of a Human-Centered Design process, we met with Veterans across the country in their homes, with their families, at work and play. We heard stories about their experiences with the VA and how our services fit into the fabric of their lives.

We built a rich understanding of what characterizes their needs, and gathered a nuanced picture of what VA services feel like to the men and women who look to us in their transitions out of service and civilian lives. Some findings surprised us, while others reinforced existing suspicions.

From our research, a narrative about the veteran experience of the VA emerged — a narrative which emphasizes the need for a VA that excels in customer service.

*“Great products arise out of listening to [people] describe their moments of deep personal pain, as well as profound joy — paying attention to what motivates and moves each of them, and committing yourself to building something that will alleviate their pain and maximize their happiness.”*

LUCKY GUNASEKARA,  
COFOUNDER OF VULCAN LABS,  
HEALTH IT INNOVATION NONPROFIT <sup>11</sup>

# Project Goals

## OBJECTIVES

With an interest in testing a Human-Centered design approach, the VA Center for Innovation set out to pilot a needs-finding sprint focused on building an understanding of what it currently feels like for Veterans to access VA services.

The focus of this project was twofold:

1. Pilot design research methodology within the VA to gauge feasibility, constraints and opportunities for adoption.
2. Identify high level user needs and characterize trends in Veterans' experiences interacting with the VA, to be used to identify initial opportunities for designing more effective VA products and services.

## RESEARCH QUESTIONS

In designing a short design research project aimed at exploring the latter objective above, we sought answers to 3 key questions about the Veteran experience:

- How do Veterans currently characterize their experiences accessing VA services?
- What behaviors and attitudes inform Veterans' experiences at the VA?
- What does an ideal VA service feel like for Veterans?

# Methods

## ACTIVITIES

### CONTEXTUAL INQUIRY:

In-person individual and group interviews, in which our researchers met with Veterans in the context of their lives - at home, at work, in social settings, etc.

### SERVICE TRIALS:

Shadowed users as they attempted to access existing digital services or tools, observing behavior, pain points, expectations, etc.

### CUSTOMER JOURNEY MAP:

Translated the steps a user currently takes through a system or service, identifying the highs and lows of the experience from their perspective.

### PERSONAS:

Developed fictional archetypes of VA users which represent stories, needs, behaviors and characteristics of the real users interviewed.

### USER NEEDS:

Generated a list of broad Veteran needs and design considerations.

This project piloted what is often referred to as the 'discovery' phase of a user-driven design process – the initial research and analysis phase into the needs and behaviors of users and user experience of existing services.



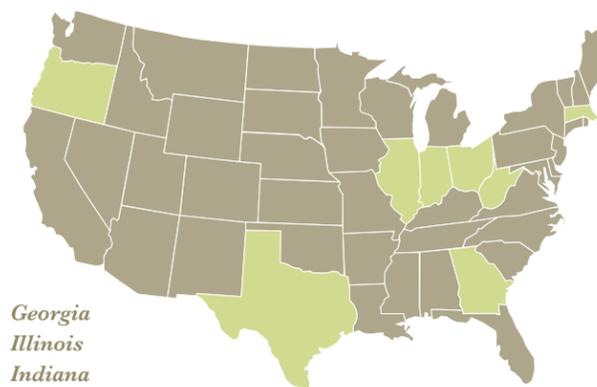
We conducted user research activities with 44 Veterans across geographic locations, socioeconomic demographics, age and eras of service. We traveled to 12 locations in 9 states over the course of three weeks, connecting with Veterans through organizational ties, grassroots communities, and informal networks.

During this time, we performed qualitative ethnographic and design activities, driven by a robust and evolving set of questions. We met Veterans and their families in the places where they access their services: in their homes, communities, offices and social venues.

Using design thinking and service design practices, we then mapped, visualized and synthesized our findings, which are detailed in this report.

# Where we went and who we met

## RESEARCH LOCATIONS



- Georgia
- Illinois
- Indiana
- Massachusetts
- Ohio
- Oregon
- Texas
- Washington, DC
- West Virginia

## RESEARCH RESPONDENT BREAKDOWN



## HUMAN-CENTERED DESIGN TOOLS: UNCOVERING "THICK" DATA

Typically the VA conducts surveys or focus groups to understand veterans' opinions about our services. While this kind of data offers immense value, it does not provide deep insight into the qualitative characteristics of a service experience or the human motivations of our customers.

Design approaches to user research focus less on people's opinions, and more on understanding their lives and experiences. By doing ethnographic fieldwork with a range of veterans — from different service eras, different geographic areas, etc— and visiting them in their homes and at their jobs, we were able to gather a complex and nuanced understanding of their everyday needs.

Jared Spool, a leading usability researcher, explains the value of research which facilitates the observation of human behavior:

*"Users can't describe activities that they don't focus on. When you have an audience that is experienced at what they do, they often don't pay attention to the small steps involved. An outside observer will see these 'unspeakables' and can document them in ways that the participants can't. It's these details that will make the user experience feel natural and well considered."*

*Innovation happens when the designers get direct exposure to the users' entire context and its subtle variations and accidental similarities. Some of the most innovative designs in the last 5 years are the result of paying attention to the little details in the user's context.*

*'Intuitive' interfaces are easier to build when designers have a deep understanding of the users' context, terminology, and processes. It's the combination of these three elements that make an interface seem intuitive, because the familiarity to users is already built in."*<sup>12</sup>



CHAPTER 2

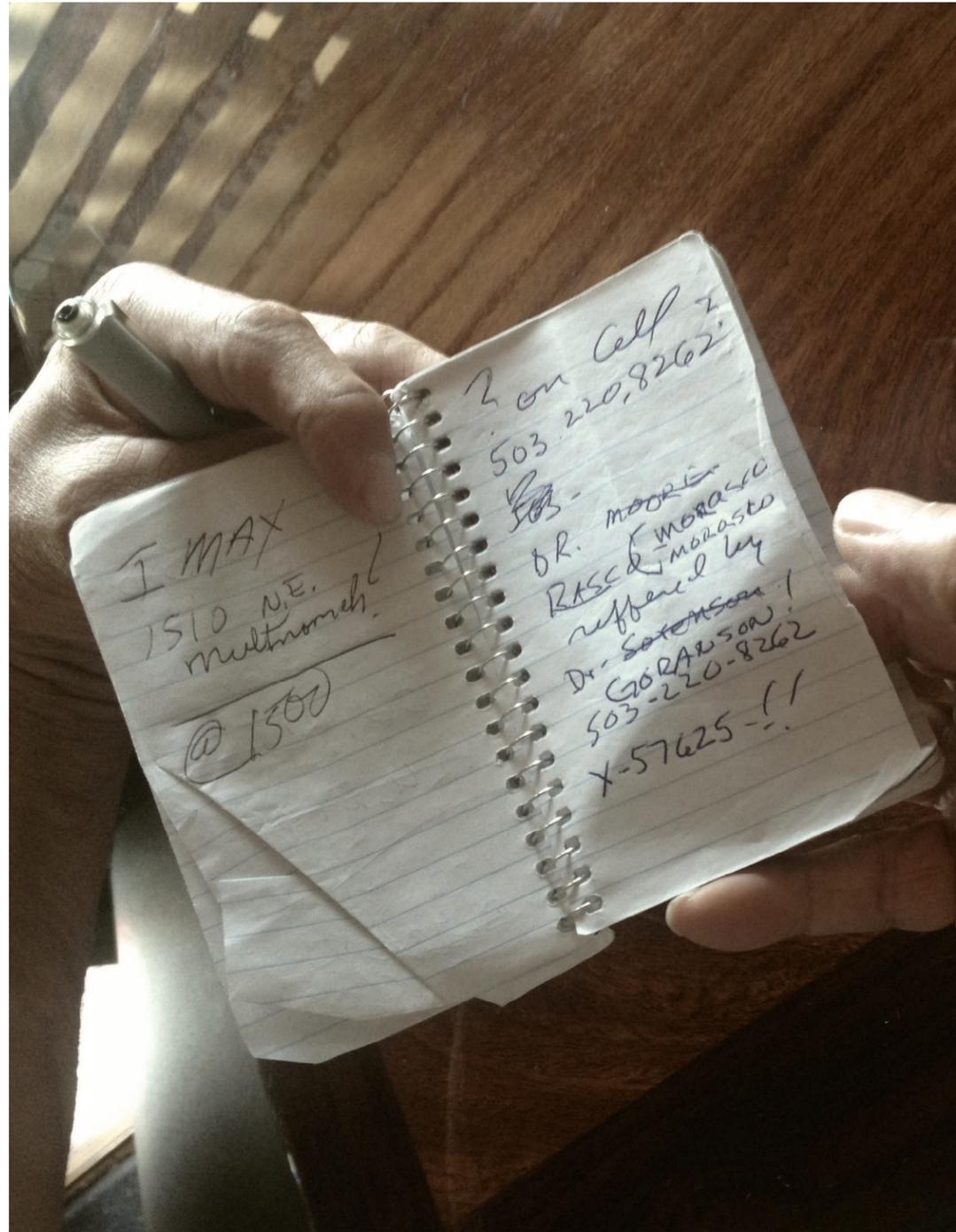
# Meet VA's Users

Businesses in the private sector know that their customers have different needs, habits, and experiences—and they make identifying and accommodating these differences a priority. Companies like USAA enjoy deep customer loyalty because their customers feel like the business treats them as individual people, communicating over channels and with a language and tone that feels natural and welcoming.

In order to create similar experiences for Veterans using VA services, we need to understand our users in new ways. At the VA, we often appropriately think to engage with our 'customers' along traditional demographic distinctions: age, geography, era of service, gender, etc.

Given that the VA provides services to people with varying needs, access, capacities and aptitudes, this pilot allowed us to unearth patterns or themes around these needs in a way that can be useful in improving how we serve Veterans and their families.

Through our research we quickly learned that the ways in which Veterans choose to engage with the VA transcends traditional demographics. We happened upon common patterns in how Vets prefer to be contacted, in their use and comfort with technology, and in their deeper needs and desires. It became clear that there are larger themes in the Veteran experience of VA's services which can help us understand the different kinds of customers we serve.



## Personas

As a part of this pilot we set out to identify high level trends in ways Veterans seek out assistance, use technology, take advantage of services, and react to challenging interactions. Based on these patterns we have created a set of four profiles, or personas, that represent the kinds of users with whom we spoke.

Each persona is an archetype based on commonalities we observed amongst Veterans who exhibited similar behaviors and approaches to accessing VA services. They are not categorized by positive or negative experiences, but by shared expectations and needs.

These personas are designed to help us begin to understand that we are serving users who are seeking not just different services, but also varied degrees of contact, support, information, etc.

For this exercise, we assessed Veterans modes of communication, channels, frequency, stated and observed needs, reactions to service experiences, military service, and analyzed observed behavior and service experiences.

### HUMAN-CENTERED DESIGN TOOLS: PERSONAS

These profiles are called 'personas,' a design tool that helps ensure that programs, services and systems are designed for real users. Alan Cooper, pioneer of software interaction design, coined the term, defining personas as a "hypothetical individual that takes on the characteristic of real users," representing real people throughout the process of designing a service or product.

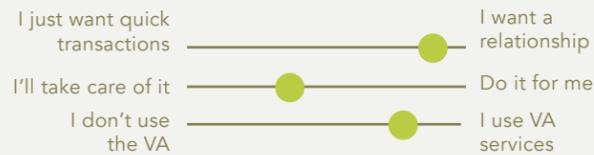
Personas are developed "with significant rigor and precision...we don't so much 'make up' personas as discover them as a byproduct of the investigation process."<sup>13</sup>

In drawing together users by the ways in which they engage with the service at hand, we can identify trends and ensure we are meeting the needs of the varied types of customers we serve.



## THE LIFER

I frequently use VA services and plan to continue doing so. I look to the VA to play a supporting, community building role in my life. I am grateful for my VA benefits, but I get frustrated when problems arise which break up the continuity of my care - like when my doctors change too frequently and when I can't transportation to VA facilities. Generally, I try to speak highly of the VA and want to contribute to making it work better for fellow Vets.



### EXPECTATIONS

- That the VA cares and takes the time to understand my needs and story
- Cost of VA services won't rise
- That I can reach someone at the VA anytime I need anything

### NEEDS

- I don't want to tell my story over and over, especially after using the VA for so long
- I want to know what's going on with my services and especially my benefits
- I'd like patient, nurturing healthcare

### DESIGNING FOR THE LIFER

Allow me to pause and ask questions, and to have access to a VA professional to speak with frequently and in a timely manner. Include info about local Veteran support chapters in communications. Provide me with a single online tool or a call center where they can refill prescriptions, see test results, and maintain all aspects of the VA needs. Give high level of feedback loops so that I can be assured my request was submitted and is being handled.



## THE TRANSACTIONAL

I joined the military largely based on the promise of a the opportunities it would afford me in life. I plan to use VA services to 'get my life on track' post-service. I tend to be in the younger generation of Vets (OIF, OFF, OND). I am often engaged in the Veteran community, see other Veterans as allies and I advocate in helping folks understand and use their benefits. But I will share my frustrations if I feel like the VA isn't helping me as promised.



### EXPECTATIONS

- That the VA will deliver on it's promises and help me to access the me the benefits I've earned
- That the VA has benefits available to my family
- That it'll be a headache, and I'll have to figure it out on my own with the help of my network

### NEEDS

- Accurate expectations
- Financial support at times, especially if I grow a family
- To feel like I am part of a community

### DESIGNING FOR THE TRANSACTIONAL

Explain VA benefits and services comprehensively and early so that life plans can made upon quickly post-service. Include lists of phone numbers, websites, resources, and why they are relevant. Auto-enroll when it's possible.

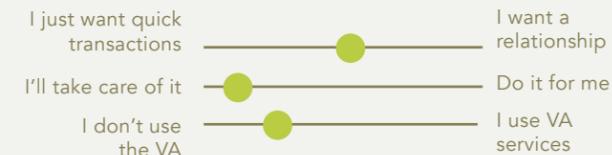
Present benefits as they relate to life events (school: GI Bill, employment: Job resources, family: home loan). Visualize processes, timelines and how I should be prepared.



## THE JUST-IN-CASE

I am proud of my service, but don't need the VA and plan on using it only as a backup. Mature and organized by nature, I have all of their papers in order with the VA and have a good idea of what I am eligible for.

I am grateful for the benefits available to me, but see working with the VA as a tradeoff for my time and will likely only lean on the VA as backup plan, to make sure my family is taken care of.



### EXPECTATIONS

- That I'll likely never need VA benefits
- That the VA will be there for me if I need it
- That there are benefits available to my family
- Private benefits are of higher quality & greater ease

### NEEDS

- Peace of mind
- To be assured that all documents are in line
- To easily get in touch with one person about one question

### DESIGNING FOR THE JUST-IN-CASE

Offer straightforward information about VA benefits that is easy to then communicate to others. Clearly articulate what is available, when, and to whom involved in my life.

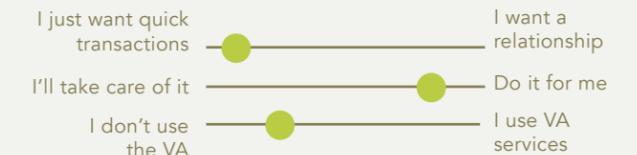
Establish an online portal or phone system where both Veteran and the VA can see that all of paperwork is up-to-date and notify me if something is missing.



## THE INFREQUENT

I really don't think very much about the VA. I have used VA benefits in my lifetime, yet often years will go by between those interactions.

This might be because I live in a place where it's difficult to access VA services, because I am financially comfortable or because it seems like too much hassle. I tend to prefer quick interaction - a short phone call or a few clicks on a website.



### EXPECTATIONS

- The VA is slow - like any bureaucracy
- The VA is for "other, injured Vets who need it more"
- Someone will tell me when and if I am eligible for something

### NEEDS

- To be able to quickly navigate processes
- To be reminded every few years of how the VA might be able to help me

### DESIGNING FOR THE INFREQUENT

Provide ways for me to learn about and access benefits both through third parties (i.e at the bank when securing a home loan).

I will most likely use VA services if I can a) see the value for my life and b) accomplish my goals in convenient, simple service interactions. Offer me easy-to-use websites and the ability to speak with someone.

# User Needs

In examining the Veteran experience of VA services, we sought to draw out a common set of user needs which will allow us to use as a basis for designing an improved user experience.

These needs help us understand what Veterans may be expecting from our services as well as what larger motivations may be shaping their attitudes.

## HUMAN-CENTERED DESIGN TOOLS: DEFINING USER NEEDS

It is a common practice in both service design and technology development — and increasingly across government entities — to first begin a project by identifying user needs.<sup>14</sup>

While the needs outlined in this project address the broad experience of accessing VA services, user needs list can range from task specific to emotion-driven.

## IN MY LIFE, I AM LOOKING FOR...

### Security for my future and family

- I want to be able to take care of my family
- I want to have a backup plan just in case
- I owe it to my kids to take care of myself

### A feeling of support

- A place to guide and offer direction, making things easier rather than harder in a time of transition or great need
- Transitioning out of service is disorientating, and I don't have an anchor
- My mentorship devolved when I begin civilian life

### A sense of independence

- I don't want to need help
- I want a job to be proud of

### Control

- I want to feel like I have a hand in my own success
- I want to have a determining role in my health care
- I want to be able to access and update my personal info

## I NEED THE VA TO...

### Treat me like a customer and deliver services in a way that makes me feel respected

- Hear and acknowledge me
- Don't waste my time
- Earn my trust
- Give me one person to answer all my questions who knows my story
- Set me up for success: set and uphold accurate expectations

### Make things easy for me to understand. Give me clear information, answers and directions

- I need the VA to not add stress and confusion to my life
- Make it so that I can use the VA without needing an insider
- Communicate in straightforward language
- Speak my language: clear, simple, non-gov speak
- Give me bite size chunks of info, information delivered not as a firehose
- Give me straight answers
- Make processes easy to understand

### Reach out to me on the timelines which I am responsive to

- Connect with me in the moments that I will be receptive to, and understand when I may be less receptive
- Keep looking for me if I'm not already engaged
- Engage with me the way I talk, think and interact, through channels which I use most in my daily life

### Offer services tailored for my needs

- Serve me when I need help most urgently
- Take care of me in a timely manner when it's not urgent
- Understand that my needs are different from other Veterans

### Give me consistent and reliable healthcare

- Provide a high quality of healthcare
- Give me a consistent relationship with medical professionals

# Designing for Vets: Key Considerations

We identified varied yet hugely significant considerations which are relevant to any Veteran-facing initiative we undertake. Any VA employee doing business directly with the Veterans we serve can benefit from an understanding of how each of these five factors may be informing and shaping the Veteran's attitude, approach, and engagement with VA services.

These are as relevant to program design and technology development as they are to service delivery and patient care.

## 1 Veterans approach the VA with low expectations and preconceived ideas

The bad reputation is powerful, and even though most say their VA experiences defy the media narrative, Veterans' negative perception of the VA is palpable. Compounded on this is a historical association with people in wheelchairs and those with extreme medical need. As a result, many Vets do not see themselves as 'needing' VA services — reserved in their minds for those with extreme disabilities — and often remain unaware of the full extent of benefits available to them.

*"We would pass around articles about the VA — like that surgeon removed the wrong testical when the dude had testicular cancer."*

LINDSAY, AUSTIN TX

## 2 Poor service delivery feels like disrespect

Negative service interactions leave Veterans with the feeling that the system wasn't designed to address their needs, which leaves them with a sense that their service isn't being respected and honored as the VA and DoD promised it would.

## 3 One bad experience will turn Veterans off for a long time.

The interactions and experiences Veterans have at any level or part of the VA reflect on the entire agency: all programs, clinics, offices, and people. A negative experience with any part of the VA is a negative experience with ALL of the VA, and it can result in Veterans missing out on significant benefits.

## 5 Veterans customer service needs are not unique

Veterans are mothers and fathers, colleagues, and neighbors. While differentiated from other Americans by their military service, these experiences rarely impact their consumer habits and needs. When we asked people about their customer habits and preferences, their answers do not differ from users of comparable services: they seek simplicity, clarity and straightforward information, helpful people and systems, and tools which fit seamlessly into their lives.

At the end of the day, Veterans are just looking to lead happy, healthy lives and aren't thinking all that much about the VA and their VA experiences.

*"This is the first time I've ever really thought about the VA. It's been around me all my life but it hasn't been a big part of my life."*

JOHN, COASTAL OREGON

*"When you think about customer service, like the Apple store, someone walks up and says 'Hey, what do you need?' The VA is the complete opposite. You feel like you're constantly communicating into a black hole."*

MARK, AUSTIN TX

## 4 Veterans want follow through, follow up and a personal touch

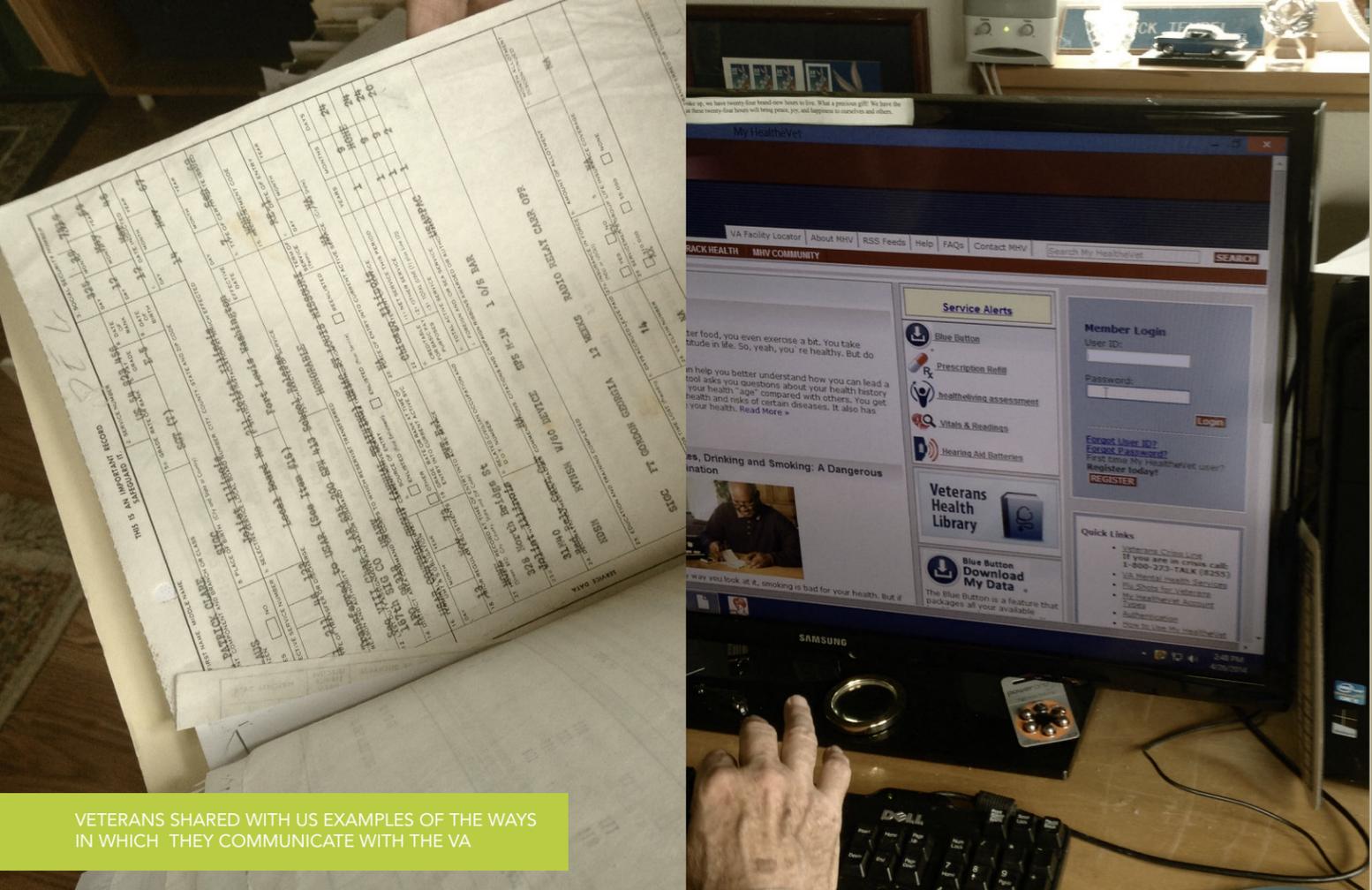
Vets often lack information and awareness of what VA services are available to them. They often don't feel ready to engage with the VA immediately after service, and thus aren't receptive to outreach efforts out of the gate. When they do finally connect with the VA, across the board, Veterans cited a desire to be able to connect with 'real people' who will follow up with them and know their story.

### HUMAN-CENTERED DESIGN TOOLS: MENTAL MODELS

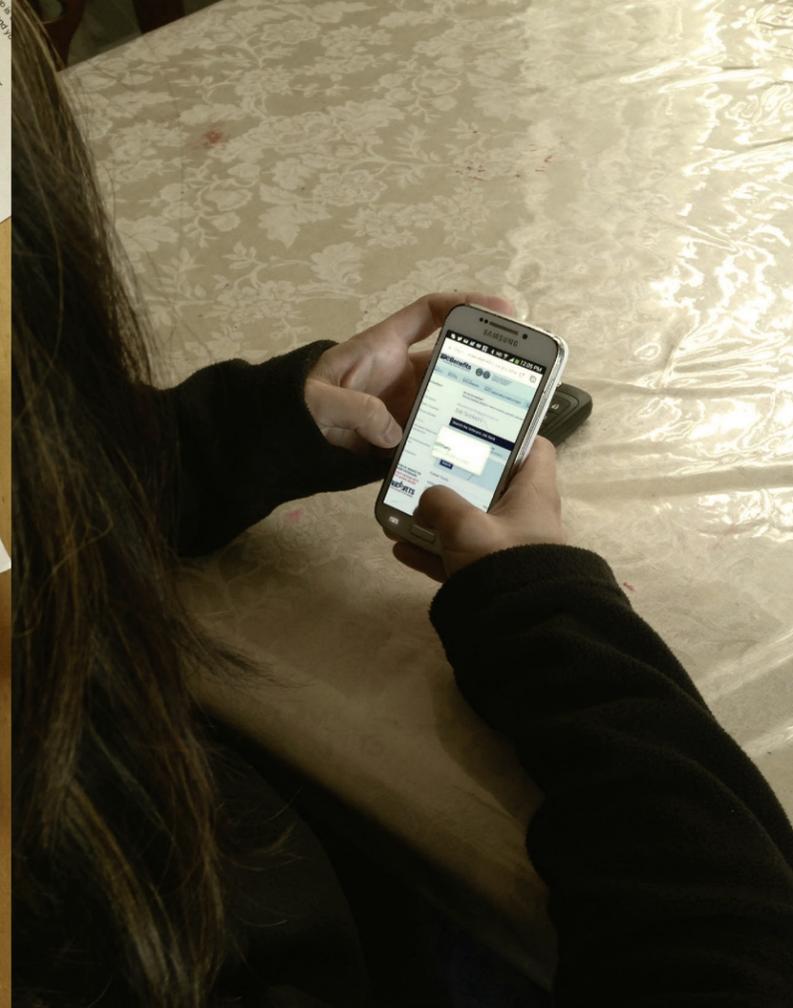
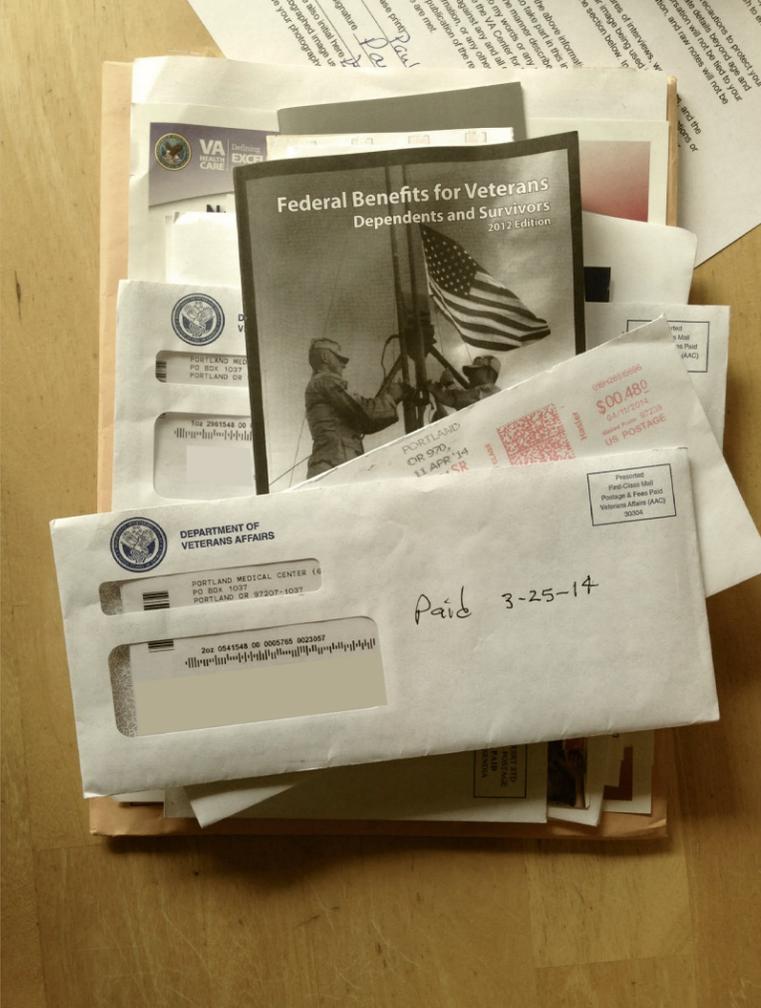
Design research exercises may often seek to identify the 'mental model' with which a user approaches a service. A 'mental model' is defined as someone's understanding for how a system works which then informed how they interact with this system.<sup>15</sup>

Mental models are unstable, based on "incomplete facts, past experiences and even intuitive perceptions," and give us insight into "what people pay attention to in complicated situations and...how people approach and solve problems."<sup>16</sup>

**Given the scope of this pilot, we did not delve deeply into this activity, though these five considerations begin to shed light on what we might expect a mental modeling activity to uncover.**



VETERANS SHARED WITH US EXAMPLES OF THE WAYS IN WHICH THEY COMMUNICATE WITH THE VA



CHAPTER 4

# Research Findings: Veteran Experience of the VA

*“If the VA were a business,  
it wouldn’t have any customers.”*

MARCUS, PORTLAND OREGON

Across the country, Veterans shared with us the ways in which seemingly small interactions meaningfully shape how their experiences with the VA. These moments can serve to disrupt or reinforce the powerful public narrative about the struggles of the VA.

What follows is a summary of what we heard, observed and inferred during our three weeks of meeting with Veterans. It is a story that is not without its challenges - especially as those of us who know the VA well may feel frustration knowing that our hard work is going unseen or unmet.

But this is the story of how our customers currently make sense of what we have to offer — and it’s ever so crucial that we listen to how it feels from the outside.

We will offer an overview of findings, followed by details on the specific themes that arose from our research.

## A portrait of the present day service experience.

*From Oregon to Texas, we met Veterans young and old who shared an appreciation for VA services matched with frustrations. This is what we observed about what the VA feels like for Veterans across America...*

For many Veterans, the VA conjures up images of hospitals, wheelchairs, people in dire straits and reminders of military ties. These perceptions often don't match up with people's actual experiences. Indeed, **many are happily surprised** by the services they receive — though frustrations about how those services are delivered remains high.

Veterans are looking to regain or maintain control of their lives, finding stability and a place in society. **The VA is a helpful means to this end. It can hinder or accelerate, facilitate or disempower.**

**Veterans are not always ready to engage with the VA right after release.** They often want distance from their military experiences. But with infrequent, inconsistent, and opaque communications from the VA, they often struggle to engage with the VA when they are ready. It may take multiple nudges and the final push often comes from friends, fellow Vets, VSOs, or family.

First contact with the VA is really only meaningful and memorable if something bad happens, and the **impact of a negative first experience can be lasting.** When Veterans do reach with the VA, they are often faced with a paradox of how they must engage with the organization. As members of the military, they are accustomed to being told what to do,

to take orders and not ask questions. As Veterans using the VA, they are **met with systems which feel complex and processes so daunting**—when they were expecting to be met by a VA that will be their ally., easing their transition

**Veterans want to be leveled with** and to feel respected. Long hold times and pages of dense text makes Veterans feel like the VA isn't putting their needs first. They're often **willing to put in the work to activate their benefits** and are understanding of the constraints and pressures facing the VA. But **they want to have clear expectations of what they need to do, digestible information in language they understand, and tools which are easy to use and find.**

**Veterans are often looking for consistency and continuity** in information and people: changing doctors and points of contact fracture the relationship they were starting to forge with the organization. The result is that **many Veterans do not feel a sense of control over and access to their own information**, and must tell their story over and over again. **Vets often request one single point of contact and one single place to go to view all their information and perform all their interactions.**

Together, the feeling of complexity and inconsistency reinforces a sense among Veterans that they can't navigate VA services on their own, and thus they turn to 'insiders' to help them — Congressional offices, non-profits, or other Veterans with VA experience.

**Veterans access VA services through the channels most native to their individual lives.** Some Veterans have few complaints, while others find that both phone and online services cause frustration. Many use the VA website for just one or two specific services, and otherwise have no interaction (and often no idea) what else is available to them online.

**Veterans recognize that the VA is serving a broad and diverse group of people with varying needs**, but it seems that VA services don't always feel like they've been designed to address targeted needs. Many feel frustrated that those with quick turnaround needs are often in the same queue as those with severe needs.

There is some feeling that VA materials and systems are designed without an understanding of the military

experiences that have shaped Veterans lives. Across the board, Veterans of all backgrounds have positive associations with customer service in the private and public sector that **recognize their military service and provide personalized and responsive interactions**, which serve to build trust among Veterans.

At the end of the day, **most Veterans aren't looking to the VA to change their lives**— they are simply looking for a smoother transition. However, that need is at times left unmet in trying to access VA services. Many Veterans describe contacting the VA as 'talking into a black hole'. **Unreturned phone calls, loops of voicemails and redirected questions feels to Vets like the VA system doesn't care about them.** Many Veterans feel positively when they are able to connect with VA staff - it creates **a human touch in an otherwise impersonal system.**

## HUMAN-CENTERED DESIGN TOOLS: SYNTHESIS - FROM RESEARCH DATA INTO USER INSIGHTS

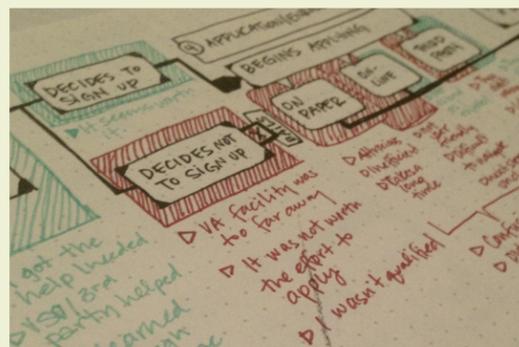
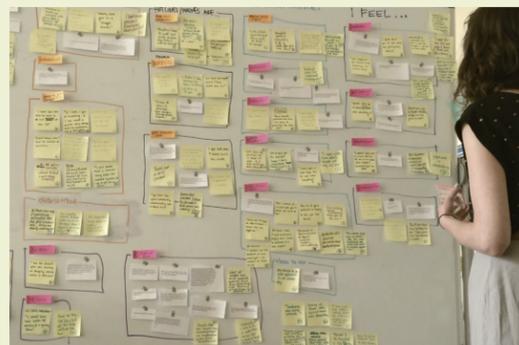
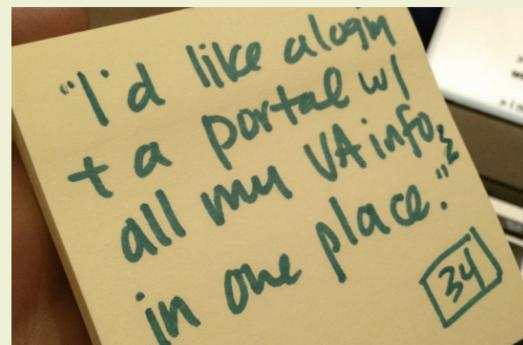
A fundamental step of any research endeavor is following collecting, but the data must be analyzed to identify findings. In the design approach to user research, this stage is often referred to as a Synthesis process<sup>17</sup>. In this stage, we are tasked with uniting “seemingly disconnected observations during research into concise design opportunities that can be made tangible and tested.”

John Kolko, one of the foremost academic and practitioner of service and interaction design, describes Synthesis, as the moment when we have the greatest opportunity for innovation, “visually exploring large quantities of data in an effort to understand hidden relationships.”<sup>18</sup>

There are a variety of frameworks and activities to facilitate the process of pulling meaning out of deep ethnographic data. As Kolko explains, this stage often appears “messy” to an outside eye, as it leans heavily on sketching, mapping, and design-thinking approaches.<sup>19</sup>

Synthesis often takes place in two parts: continuously in the field, analyzing and organizing data throughout the investigation, and then with a multi-week analysis period at the end of the research stage.

For this project, we conducted nightly synthesis of detailed interviews notes, organizing and tagging data by topical category (such “First contact with the VA” or “Support Systems”), followed by a three week focused synthesis process, which involved iterative workshoping of findings.



Photos from the synthesis phase of this pilot project.

## Key Insights

The experience articulated above was shaped by four key insights into the Veteran customer experience. These insights suggest that in order to create an ideal 21st century VA experience, we must focus on service interactions, personalized offerings, and smarter outreach strategies.

In this section, we will explore each of these insights, along with the observations and needs that emerge from each.

### INSIGHT 1:

**Veterans often feel overwhelmed, confused and unable to navigate their VA services.**

### INSIGHT 2:

**We need to be smarter about when, how and with what frequency we reach out to and engage Veterans.**

### INSIGHT 3:

**There is a lot of good happening, and we need to play off of what is working well.**



## INSIGHT 1:

## Veterans often feel overwhelmed, confused and unable to navigate their VA services.

*“It was a constant battle.  
You figure it out or don’t.  
That’s not a good option.”*

JOSE, BOSTON MASS

One of the things we heard consistently from the Veterans we spoke with was that accessing VA services can feel tremendously difficult. From getting answers to simple questions, to booking medical appointments, trying to work with the VA feels like “navigating” — complex, onerous, and unpredictable.

This insight arises out of **four trends** we observed in the challenges Veterans are facing upon engaging with the VA. This section will elaborate on these observations:

- a.** It feels like I’m speaking into a black hole...
- b.** Information is confusing, inconsistent and often hard to find. I can’t figure out what I’m qualified for.
- c.** I don’t know what to expect along the way and I can’t figure it out by myself.
- d.** Waiting is synonymous with accessing VA services.

## a. It feels like I'm speaking into a black hole...

### OBSERVATION

In our conversations with Veterans we often heard that there was a lack of feedback and follow-up in their interactions with the VA. This makes Veterans feel like they are not a priority, like the VA is intentionally making it difficult for them to get their benefits.

*"I think they laid out their services pretty well...if only I felt like I was actually talking to someone else and that there is ownership on their end."*

LETITIA, BOSTON MA

### NEEDS

- I need my time to be respected.
- I need to know who to call for answers or for help.
- I only want to tell my story once.
- I need anyone who is working with me to know my story and my history.
- I need the people helping me to have the answers to my questions.
- I need confirmation after I submit paperwork.
- I need the people helping me to do what they say they will do.

### WHAT WE HEARD

**It's hard to reach people, and when I do, they often aren't helpful.**

The Veterans we spoke with said that when they call the VA helplines the person they speak with often does not have an answer to their question(s). Many Veterans feel they are passed from person to person in order to get a simple answer.

*"I have a housing allowance and education benefits. When I got a new bank account but there was no way to easily say 'I have a new bank account.' You have to call up, wait 45 minutes-- that's optimistic--just to spend two minutes with an operator to do something I should be able to do online. Nobody I talked to could give me a straight answer on where I go for this."*

MARCUS, PORTLAND OREGON

**VA phone lines are a frustrating experience.**

As with any service, our customers want to pick up the phone and call someone for help when they have a question or a problem. The VA has dozens of phone numbers, yet according to the Veterans we spoke with, the waiting times are too long, and they often do not receive the help that they need.

*"I used to be able to call my primary care doctor, or the nurse in the women's clinic. Now you have to call the central line and they don't put you through to the clinic: they take a computer message and send it over to the clinic, then the clinic calls you back, but if you miss the call then you have to go through the process all over. It can turn into days of trying to get a hold of somebody."*

MICHELLE, CHICAGO ILLINOIS

**I don't have a consistent point of contact. I have to keep repeating my story.**

Veterans told us that they often have to talk to multiple different people to get a simple response, and that each time they speak with someone they have to re-hash their entire story, instead of it being documented internally. Veterans assume there is a centralized system where customer service agents can see a Veteran's history, so when they must continually rehash their stories upon each encounter, they become frustrated and lose confidence and trust in the VA.

*"The turnover in doctors is high - I've been through like 4 of them in a year."*

ALICIA, PORTLAND OREGON

*"A case person that is dedicated to YOU would be ideal. Someone who knows you, your history, your issues, etc..."*

ANDRE, RURAL OREGON

**There is often little to no follow-up.**

Veteran expressed disappointment in the lack of acknowledgement and follow-up they receive when communicating with the VA on various levels. On a technical level, when Veterans submit something to the VA there is rarely, if ever, acknowledgement of that action. Many Veterans said that after submitting an application, there was no confirmation that it had been received, so they were often unsure if their application had even made it to the right place.

Veterans also interact with the VA in-person, through individuals at local offices, or over the phone through customer service lines. Many Veterans told us that there was no follow-up from the individual they spoke to. We found this across service lines and modes of communication, from email and phone, to in-person office visits.

*"Our local VA rep doesn't pick up the phone. I leave a message and he never calls me back."*

JOSE, RURAL INDIANA

*"When you call and make contact with someone, they usually ask you to email someone and then when you do that, you feel like that email never gets returned."*

GEORGE, DAYTON OHIO

**b. Information is confusing, inconsistent and often hard to find. I can't figure out what I'm qualified for.**

OBSERVATION

Nearly every Veteran we spoke with expressed confusion about information related to the VA, their benefits, and application processes. Qualifications are challenging to ascertain, muddled by unfamiliar language and a sense of 'information overload.'

*"It's like a bunch of people sat in a room and said 'What is everything we could possibly say about this?' and then put it all onto one page."*

GREG, AUSTIN TEXAS

NEEDS

- I want information to be easy to find.
- I need information to be straightforward and easy to understand.
- I need consistent communication about VA services organized around my needs (instead of government structures)
- I need messages on VA platforms to be consistent.

WHAT WE HEARD

**Written information is hard to understand**

Information is not written in a language that Veterans or their families can connect with or understand. The language used is often directly from official internal documents-- it is as if the VA is writing for itself, rather than for Veterans.

**Information is not uniform**

Information across platforms is inconsistent, and there is no clear trusted source for accurate information. There are countless websites, hotlines, portals, and mobile apps that veterans can go to for information —many of which have contradictory, outdated or otherwise inaccurate information.

**There is too much information**

There is simply too much information. One Veteran referred to the website as a "wall of text." Veterans want clear and direct information about their benefits. They do not want every single detail and exception--they want to know what is pertinent to them.

*"I want my question answered, not all the questions answered."*

KAREN, ATLANTA GEORGIA

**c. I don't know what to expect along the way and I can't figure it out by myself.**

OBSERVATION

Over and over, the Veterans we spoke with conveyed frustration and confusion with the lack of transparency of the process. There seems to be a sense that they are missing key information that could help them. They want to understand the process, and know what to expect while they are waiting--estimated wait times, when to check in, and who to call.

NEEDS

- I need clear directions about my eligibility.
- I need to understand the processes for applying, enrolling and using my VA services.
- I need to have realistic expectations of what I can anticipate at each stage of the process.
- I need to know what documents I'll need and how I can facilitate speedier delivery.

*"People have no idea where to go. I went to Congress, sent the whole thing up & down the chain because this agency doesn't return phone calls. Imagine being the person on the other side feeling that."*

LUCAS, AUSTIN TEXAS

WHAT WE HEARD

**Processes are unclear.**

Veterans want to understand exactly what they need to do and what they will need at each step along the way. Veterans were concerned that they were unable to track their progress and, when asked, many couldn't explain their path through a service because it was so complicated.

**Veterans often feel like they are missing key information**

A number of Veterans we spoke with shared a frustration around not knowing what to ask (or even that they should ask) - and then feeling the implications of that later in the process. It left them with a feeling that the VA knows things they do not. We met many Veterans who never knew to inquire about key services available to them.

*"I found that unless you know specifically what to ask for, they won't grant it to you."*

SAM, SUBURBAN ILLINOIS

**There is a lack of expectation-management.**

Veterans told us that they are prepared to do heavy paperwork and are willing to wait for many services. Across the board, they expressed a desire for increased transparency. They want to know what to expect: about how long they will wait, when to check in, and what to plan for.

*"They should have very clear step-by-step instructions online in one place as you move through a process."*

MICHELLE, CHICAGO ILLINOIS

**I need to lean on others to help me navigate the process**

Veterans often cited feeling like they must rely on an 'insider' for support - someone to help them 'navigate the system' as we heard it described. Many Vets look to formal and informal support systems - from non-profits to their peers. We heard from numerous Veterans that working with Congress felt more effective than working with the VA. (While these 3rd parties can provide great assistance, they are also at times misinformed).

*"I've been dealing with the VA since 1968 and I wouldn't know how [to file a claim]. My old VA person never told me to do so."*

SETH, SUBURBAN OREGON

## d. Waiting is synonymous with accessing VA services.

### OBSERVATION

The inevitability of long wait times--for appointments, phone calls, payments--makes people think twice before engaging with the VA. It seems people learn to account for this, building time into their lives prepared to wait on hold or for services to arrive.

This was one of the most common frustrations we observed - one which seems like it could be mitigated by communicating timelines and providing clearer information up front.

### NEEDS

- I need services delivered on reasonable timelines
- I need accurate information on what to expect while waiting for services
- I need timely correspondence and follow up
- I don't want to be left waiting in my time of dire need (financial, medical, etc.)
- I need access to the right contact information

### WHAT WE HEARD

**When services are direly needed, long and unexpected wait times are most difficult.**

While in some cases Veterans are willing to wait - and indeed they learn to make the time required to get through VA processes - there are many times when the waiting hinders their ability to thrive.

More specifically, students cited late GI Bill payments, and patients expressed frustration with having to wait far longer for medical care than in private sector health systems.

*"I always set aside an hour or two every time I need to call the VA - I know to expect that I'll be on hold and get the run around."*

KAREN, ATLANTA GEORGIA

*"Be patient. Be very very patient."*

MICHELLE, CHICAGO ILLINOIS



# Customer Journey to VA Services

While there are many paths into VA services, we identified common trajectories in the process of engaging with the VA. We translated those paths into touchpoints in a service-member's transition and captured the positive and negative interactions associated with each stage of the transaction. The result is a customer

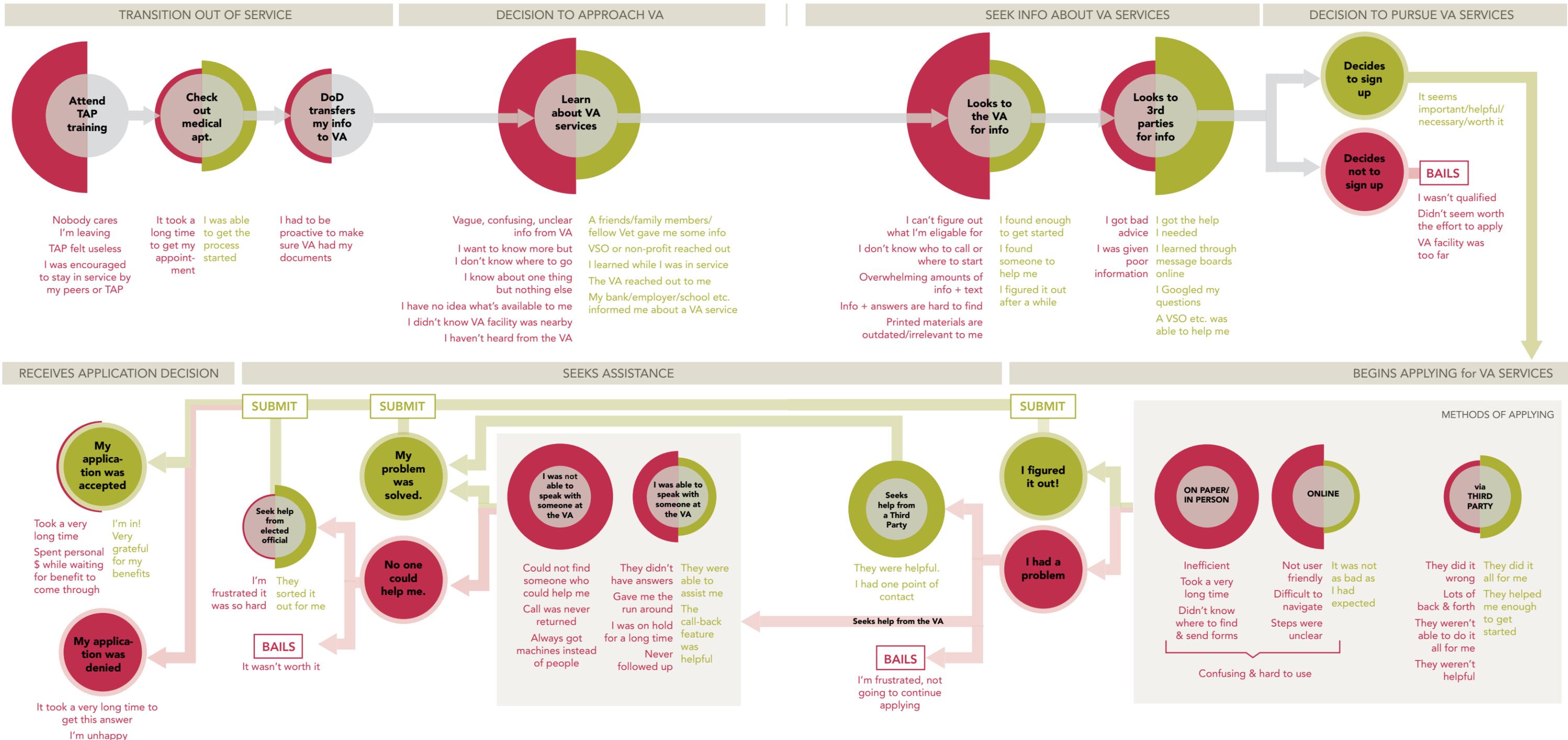
journey map, which captures the key intervals between a Veteran's release from service until they have been approved for VA benefits.



## HUMAN-CENTERED DESIGN TOOLS: CUSTOMER JOURNEY MAP

A customer journey map — “a diagram that illustrates the steps your customer(s) go through in engaging with your company” — is a helpful tool for documenting a users' path through a service<sup>20</sup>. These maps can be used to identify the interactions which cause users most discon-

tent (or 'painpoints'). They allow us to visualize the emotional state of users and “highlight the flow of the customer experience—from the ups and downs along the way to those critical pain points where our attention and focus are most essential.”<sup>21</sup>





## INSIGHT 2:

We need to be smarter about when, how and with what frequency we reach out to and engage Veterans.

*“When you join the military, you’re recruited. They’ll pick you up, talk to your mom, however often you need ‘em to. When you get out, they say ‘here’s a ticket home, you later, son.’”*

LUCAS, CHICAGO ILLINOIS

The VA spends an enormous amount of effort and resources on outreach and engagement, yet many Veterans we spoke with didn’t recall having been reached out to by the VA. Our early research indicates that there remains a gap between the ways VA is conducting its outreach activities and the times, places, and mediums where Veterans are most likely to respond. We uncovered a strong brand disconnect as well, as the inclusive and diverse offerings of the VA seem to be largely unknown to many.

In this section, we will examine this challenge, through the lens of **four factors** we observed which may be preventing Veterans from engaging with VA services. These offer useful considerations for how we may better connect with our customers:

- a. I am not always ready when the VA reaches out to me.
- b. I don’t think the VA is a place for me.
- c. The VA often communicates with me in ways that don’t make sense for my life.
- d. I receive inconsistent communications from the VA.
- e. I look to my informal networks before turning to the VA.

## a. I am not always ready when the VA reaches out to me.

### OBSERVATION

One interesting theme that emerged from our conversations was that many Vets do not seem to respond to contact from the VA in the first few months (or in some cases, years) after their service. They are often keen to return to their regular lives, and are overwhelmed by their transition to civilian life. Sometimes Vets need multiple nudges before they are ready to approach the VA.

### NEEDS

- I expect the VA can reach me through the information it, or DoD has about me
- I'd like the VA to understand what I might be going through and reach out to me at moments when I'll be most receptive

*"The first six months out is a complete high, I was so happy to be away from the military. But, around the six month mark I was feeling isolated and that was literally the toughest part of my military experience."*

JOHN, RURAL OREGON

### WHAT WE HEARD

**The moments right before and after discharge may not be the best time to reach Veterans**

Many of the Veterans we spoke with said that during their initial transition they were not thinking about the VA or their benefits--they were eager to get back home and restart their lives. It is often months later that needs and challenges begin to arise, at which point it may take a few attempts to engage them.

*"It would be great if they called a few months after you leave, to remind you what you're eligible for."*

MARCUS, SUBURBAN OREGON

**Many Veterans assume the VA knows where to find them**

Across the board, Veterans we spoke with assumed the VA had all of their contact information on hand, from their time in the military. This assumption that DoD transfers information to VA leads Veterans to believe the VA could reach out to them at any time, but does not.

**Many recently separated Veterans face a paradox as they struggle to adapt from military culture into civilian life, and may be more sensitive to frustrations at the VA**

Many Veterans cited a tension between military and civilian norms, and the challenge of shifting from following orders to proactively navigating the VA's system. The result is that those struggling with this adjustment may be less receptive to the bureaucracy of the VA right after release.

This tension is magnified by an expectation that the VA is delivering on the DoD's promise of benefits in exchange for military service, and the frustration that on-boarding and off-boarding aren't delivered with the same level of care. This dynamic seems a valuable consideration when trying to engage with newly separated Veterans.

## b. I don't think the VA is a place for me.

### OBSERVATION

VA hospitals and clinics are perceived as destinations for the old, the sick, the needy, and the severely injured. There is a common misperception that the VA is only for injured Veterans and/or Veterans who saw combat. Many veterans are looking for regular care and visits for minor issues, like a cold, an achy knee, chronic headaches, or just your average regular check-up.

### NEEDS

- I need to be made aware that the VA has services that are relevant for me, not only those with extreme needs
- I'd like to have health care that is separate from those with urgent and critical needs.

*"You're leaving a culture of 'you don't deserve this stuff.' And then you think, the VA is just for the severely wounded, a place where old people in wheelchairs go and Vets are the old Vietnam guys. It's hard to get your head around the notion that you're in that category."*

GREG, PORTLAND OREGON

### WHAT WE HEARD

**Veterans have a sense that those with extreme needs should be cared for first, and thus misunderstand that there are services for their needs as well**

In the current system, it seems many Veterans with severe needs are cared for in the same locations as those with minor needs. Many Veterans we spoke with expressed unease with being in a waiting room surrounded by severely injured Veterans, amputees, and very ill people. It makes them feel as if they don't belong there--as if they are taking up resources that should be going to Veterans with more acute needs. For some, it makes them very uncomfortable and they disengage.

*"The first time I went, it was so depressing. Just poor souls rolling down the hallway. That was hard for me. Maybe I went too soon after I returned home. But I can't bring myself to go there again."*

LITITIA, CHICAGO ILLINOIS

**VA is facing an image and perception gap - which results in disengagement by many Veterans**

In spite of the VA's robust efforts to highlight diversity of background and experience in outreach materials, continue to think of VA's customers as the "Vietnam guy in a wheelchair".

Routinely, the Veterans we spoke with - even those in their 40s and 50s - were genuinely unaware of how the VA could help them, due largely to the impression that VA's services are intended for those with more extreme needs. We spoke to many Veterans -- particularly those without strong connection to their military communities -- who have yet take advantage of their VA benefits as a result of this disconnect.

*"The VA...just seems like a place for old people."*

MARK, AUSTIN TEXAS

### c. The VA often communicates with me in ways that don't make sense for my life.

#### OBSERVATION

The VA provides hundreds of benefits and services to Veterans who are as diverse as America: married or single, injured or healthy, employed or unemployed, and every race, gender and religion. From the ways people use technology to the frequency of contact they require, we observed Veterans engaging with the VA in ways that did not seem to match their situations. It became clear in our research that we are may not always be connecting with Veterans in the most effectively means.

*“Most of the correspondence I get is snail mail. I have stacks of letters from the VA - didn't even open half of them. And the only way to get in touch is to put your phone on speaker, and wait on hold. Not ideal.”*

MARCUS, AUSTIN TEXAS

#### NEEDS

- I'd like to be able to communicate with the VA through platforms that I use.
- I'd like to be able to choose and modify my preference for communicating with the VA over text, phone, email, or mail.

#### WHAT WE HEARD

**Veterans have varied preferences and needs for communicating with the VA, and rising expectations of digital service options.**

For some, a natural form of contact is email, for others it's the phone, yet it feels to Veterans that VA's default communication is paper. While there are those for whom paper remains a reliable back-up for personal records, many Veterans — young and old alike — expressed frustration with the paper-based communications of the VA. Even when Veterans contact the VA digitally—landline, mobile, or email—they still receive responses by regular mail. Many suggested a single place online where they can access and manage their VA information.

When asked about their favorite services, many pointed to the flexibility of USAA or their banks, which are increasingly offering customers options for text, email, phone, and mail communications.

*“I want to call or text or email, but the VA always responds by sending me something in the mail. I can't easily change my address in VA systems sometimes so bills get mailed to the wrong address and then I'm screwed.”*

MICHELLE, CHICAGO ILLINOIS

### d. I receive inconsistent communication from the VA.

#### OBSERVATION

The Veterans we spoke with seemed thirsty for connection. If the VA is doing outreach and engagement at the local level, it is often not evident to Veterans.

*“They send me this benefits book every few years. I read it when I need a nap. Other than that, I don't really hear from them unless I owe money. I wonder what I'm missing out on.”*

PETER, RURAL OREGON

#### NEEDS

- I'd like to know what benefits and services are available to me
- I want to know that I'm not missing out on something
- I want to know where and when I should expect to hear from the VA

#### WHAT WE HEARD

**Outreach from the VA seems unstrategic and inconsistent**

Few Veterans we spoke with have many recollections of direct outreach from the VA through any channel: by mail, phone, or in person. This indicates that either (1) not enough outreach is occurring, (2) the outreach is not clearly tied to the VA, or (3) the outreach is not memorable in any way.

Of the Veterans who do recall hearing from the VA, the outreach was not consistent. Some received communications by mail, others have an ongoing relationship with their VA representative.

*“Our local VA Rep didn't even know there was a VFW here in our little town. We had to ask him to come speak with us. Seems like it should be the other way around.”*

PAUL, RURAL INDIANA

## e. I look to my informal networks before turning to the VA.

### OBSERVATION

One interesting theme that emerged from our conversations was that many Vets do not seem to respond to contact from the VA in the first few months (or in some cases, years) after their service. They are often keen to return to their regular lives, and are overwhelmed by their transition to civilian life. Sometimes Vets need multiple nudges before they are ready to approach the VA.

### NEEDS

- I am more likely to engage with the VA if it is present in the authentic networks I am already a part of
- I need to know that the organizations I lean on have accurate and clear information about VA services

### WHAT WE HEARD

#### Most of what Veterans know about the VA comes from personal networks and 3rd party entities

Many Veterans we spoke with learned about their benefits by chance--from a buddy they run into, from a real estate agent, or from a school counselor. When transitioning out of the military, unit leaders heavily shape their understanding of processes, programs and benefits.

We saw evidence of countless organizations delivering deeply services to Veterans on the ground. Yet we also heard stories of misinformation and observed dated materials being handed out.

Veterans clearly rely heavily on their networks for information about the VA and their benefits, but the risk with these sources is that their information is not always accurate or complete. While a complex undertaking, it became clear that these natural networks and grassroots resources currently have the most immediate contact with Veterans.

*“My reserve unit turns to me looking for help with VA stuff. I tell them what I know - but it’s a lose lose, because I don’t really understand it myself.”*

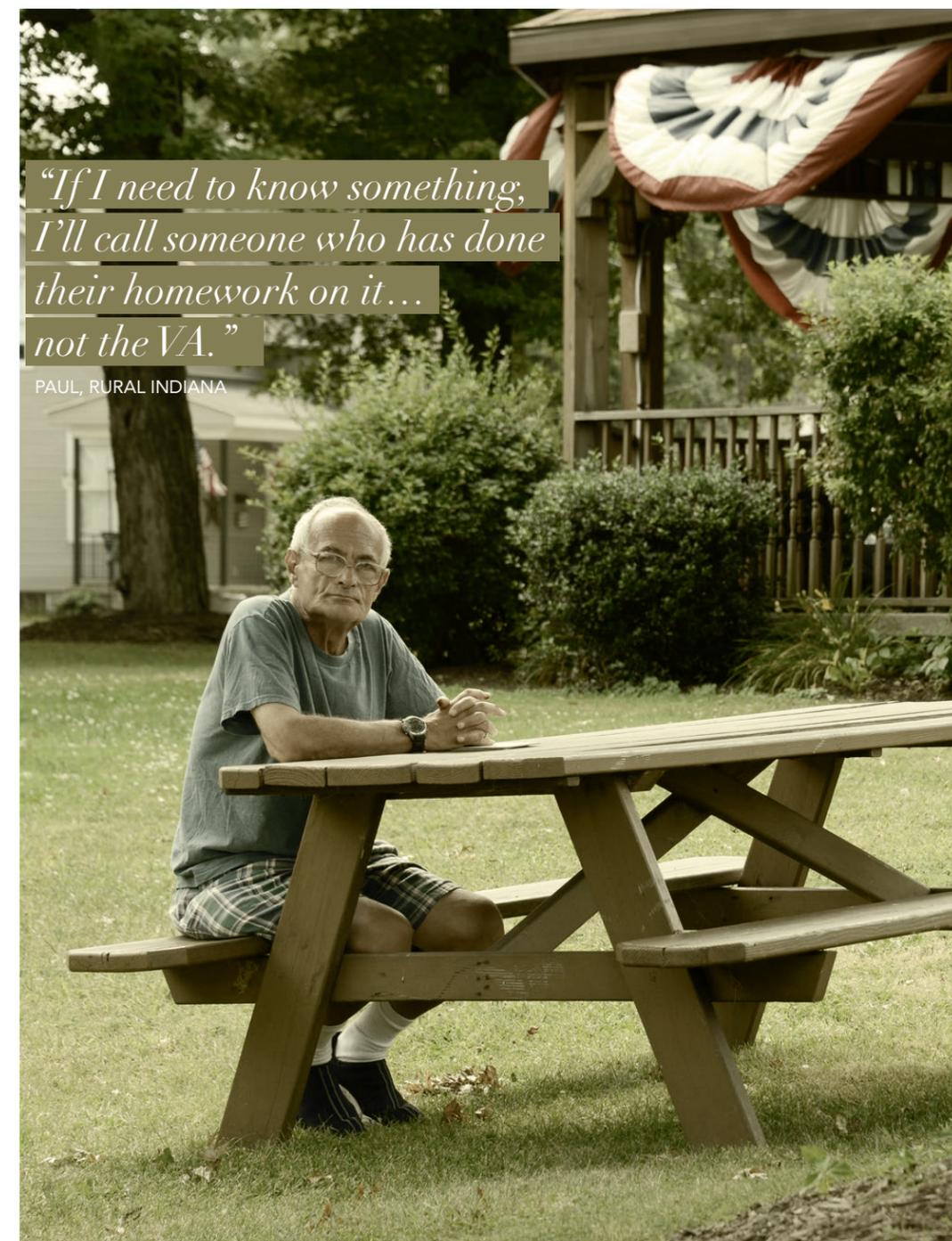
CARL, CHICAGO ILLINOIS

*“The people I looked up to when I was in service gave me bad info. I had a back injury and they told me there was no way I’d get any disability at the VA. So I didn’t pursue it until years later.”*

LETITIA, PORTLAND OREGON

*“We help eachother out. I tell the guys here [at the VFW] to use their VA benefits. I think I know more than the VA rep it seems like.”*

JOHN, RURAL INDIANA



*“If I need to know something, I’ll call someone who has done their homework on it... not the VA.”*

PAUL, RURAL INDIANA



## INSIGHT 3:

There is a lot of good happening, and we need to play off of what is working well.

*“The VA has done a great job of getting Veterans involved more. Five years ago, a lot of people stayed away from the VA. Now that’s changing because the VA has seems to be thinking about customer service.”*

JOHN, RURAL OREGON

Every Veteran has a different VA story. While frustrations were common, many did not define their overall experience as entirely negative. Often, the Veterans we spoke with expressed a sense of gratitude for the VA’s offerings, told stories of caring doctors, and shared experiences with helpful programs. Those who approached the VA with low expectations often shared that they were pleasantly surprised about the quality of care and attention they received. We were conducting this research as the events in Phoenix were unfolding, yet many Veterans asserted that the reports in Phoenix did not reflect their experience with their local VA.

A theme arose in our observations: Veterans were often pleased with the service offerings and the people with whom they had contact on a regular basis, but the service transactions provided the most fodder for grievances. It seems there are lessons in what we do well which can be carried over into these areas which need improvement.

It’s important that we document the good along with the struggles. What follows are **three trends** we heard about the positive experiences at the VA.

- a. It has gotten better.
- b. It is worth the headache.
- c. Services exceeded my expectations.

**a.** It has gotten better.

OBSERVATION

Many Veterans expressed to us that the system and quality of care has noticeably improved over the last 20 years. Baby Boomers were especially quick to note that they experience a far better VA than their parents did.

While the Veterans we spoke with recognized that more progress needs to be made, especially for this new generation of Veterans, they seemed to believe that there is forward momentum.

WHAT WE HEARD

*“In 2005 I went back to the VA after many years and it was amazing. It’s totally different-- a different building, different attitude... it’s much better.”*

SAMANTHA, BOSTON MA

**b.** It was worth the headache.

OBSERVATION

While Veterans expressed a number of frustration about VA processes, almost everyone we spoke with asserted that in the end the time and energy spent is well worth it.

Older Veterans were especially forgiving of paperwork and lengthy processes, as they perceive the care they receive to be critical to their well-being and livelihood.

WHAT WE HEARD

*“I talked to a lot of people who thought it was not worth it. But for me, I’m in a 6 year PhD program... it’s worth the headache.”*

LUCAS, AUSTIN TEXAS

**c.** Services exceeded my expectations.

OBSERVATION

Veterans overwhelmingly come in with very low expectations, only to find that the benefits and services available are actually quite good. While many Veterans admitted to having heard negative things about the VA, they noted that they had good experiences and received great care. In fact, some Veterans have had such positive experiences that they expressed frustration with other Veterans always focusing on the negatives.

In the end, we are reminded that unfortunately good stories and experiences do not travel as quickly as negative ones.

WHAT WE HEARD

*“The staff there at the clinic... I’m gonna call them excellent. I’ve never had to wait for an appointment. i’ve never had any problem.”*

TRAVIS, RURAL INDIANA



## CHAPTER 4

# Lessons from the Pilot: A Powerful Approach with Opportunity to Scale

*“I can tell you...that in all my time with the VA no one has ever asked me questions like this before. I really appreciate it. It’s so good to know my opinion is useful and important.”*

SUSAN, SUBURBAN OREGON

## A user-centered focus yields powerful insights

Throughout the course of our pilot, it became clear that it is unusual for Veterans to interact with the VA through this kind of engagement. Many expressed gratitude and an increased sense of faith in an organization that will willing to spend time understanding their perspectives and hearing their stories.

The pilot offered an opportunity to test a Human-Centered Design approach to user research for VA’s services, programs and customer interactions. At the very least, we gained a richer understanding of notions or suspicions. Simultaneously, in just a few short weeks, with a small team and limited budget, we were able to identify significant and meaningful

insight into the experiences of our customers. While we did not speak to a large number of VA’s users — and indeed, the methodology is focused on depth over breadth — resounding themes and trends emerged that we suspect would be reinforced by further investigation.

This exercise proved a valuable exploration into what is possible to gain from engaging with our customers in their homes, observing their behaviors, hearing their needs, and applying tools of private sector customer-focused innovation to the challenges of our large public institution.

Our research illuminated that the dedication and hard work of VA employees is often lost in an unsatisfying, and at times frustrating or negative, customer experience. While this project never sought to test the full Human-Centered design process—merely a pilot of its research approach—it has indicated that scaling a user-centered approach to the design and delivery of our services has the potential to yield significant impact for improving our customer satisfaction.

We highly recommend that the VA examine opportunities to incorporate tools of design research into both large and small scale projects and strategic decisions making efforts.

## Opportunities for 21st century customer experience

As the aim of this project was largely to test a new approach to understanding the experiences of Veterans, our process was not focused on the generation of solutions. Rather, we were piloting the initial discovery stage of a human-centered design process--not exploring the full design cycle of ideation, prototyping, testing and iteration.

That said, our findings do suggest some ambitious enterprise-level opportunities for the VA. Some of these come directly from Veteran requests; others grew out of our observations. Many of these are not new ideas for the organization, but it is important to reinforce the need for a Veteran-centered customer service delivery model as defined by user needs.

### Invest in growing a warm, responsive and transparent customer service system.

- A single point of contact assigned to a Veteran that knows their full history and needs.
- A single online dashboard with one login that contains all Veteran information and their benefits, health information, records, documents and services history.
- A customer service system that is in line with the highest industry standards.
- Consolidate phone lines, and improve call center efficiency and service.
- Explore and test options for communicating realistic timelines for each process which requires some back-and-forth between the Veteran and the VA.
- Create standards of customer service to require follow-through and follow-up.

### Create consistent materials with simple, easy-to-find info about benefits, eligibility, and contact information.

- Redesign and consolidation of all Veteran-facing digital services and platforms into a single website, creating standard language and design templates, to be driven by an exhaustive user-centered and agile development process
- For every service offering, design clear step-by-step instructions in plain language that can be used on any VA platform. Use common visual and written language so that these step-by-step guides are consistent across the board.
- Evolve the VA's Veteran-facing communication strategy, training employees across the agency on content strategy, write and deliver user-friendly written material.
- Provide basic design training and resources to offices responsible for producing web and print materials, with an emphasis on simple, clear, and digestible visual materials.

### Identify and test opportunities to offer personalized and customizable options.

- Provide options for users to indicate preferred mode of contact with the VA (via phone, text, email, etc.)
- Pilot 'healthy clinic' models to explore health care delivery in ways which serve both preventative and urgent care needs.
- Stand up a central CRM database that meets industry standards, which tracks user history, demographic factors, technology usage, preferred mode of contact, etc., tailoring engagement to needs tracked over time.

### Investigate gaps in Veteran engagement and explore strategies for smarter outreach

- Execute a robust research project, including both market research, user-centered design, and engagement analytics to understand where we are currently successfully reaching Veterans, what communities we are categorically failing to reach, what times in peoples' lives they are most receptive to VA outreach, and what channels are most effective for reaching different members of our constituency.
- Perform an ecosystem assessment of stakeholders currently engaged in Veteran outreach to identify gaps and opportunities for ensuring stakeholders are distributing and disseminating consistent and up-to-date materials.
- Pilot an electoral campaign-style field outreach initiative, mobilizing local partners to employ metric-driven grassroots outreach strategies to enroll Veterans and distribute information.

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# Exploring next steps for integrating user-centered approaches across the VA

Efforts to weave Human-Centered Design principles into the fabric of VA operations should revolve around both people and process, and stretch across multiple fronts. This pilot tested the initial ‘discovery’ research phase of the HCD process. The next step in scaling up HCD efforts should include larger pilots that test complete HCD cycles -- from discovery through to ideation, prototyping, testing, iteration and on-going release and refinement -- ideally on tangible Veteran-facing products or programs.

Integrating tenants of this methodology across the VA will indeed require significant planning, collaboration and design. VACI considers this pilot the first step of a longer journey, and the beginning of a conversation about how to build more effectively to meet the needs of our customers. We are eager to help our organization continue to evolve and grow as an effective and meaningful source of support to Veterans and their families.

## End Notes

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