DESIGNING FOR AND WITH VETERANS

ONE YEAR OF USING HUMAN CENTERED DESIGN TO DEVELOP BETTER SERVICES AND EXPERIENCES FOR VETERANS AND VA
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VA wants to meet your needs. Here are the services available to you.

- I need health care
  - Primary
  - Specialty
  - Mental
  - Network access

- I need a job
  - Career counselor
  - Skills training
  - Application resources

- I need education
  - Skills training
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Executive Summary

When we put the Veteran experience first, we can tackle VA’s most complex issues.

For VA to successfully address our greatest challenges, we need to understand how Veterans and their families perceive and interact with VA. The Veterans Experience team is using human-centered design (HCD) at VA to orient services toward Veterans and their families. By working to understand what Veterans want and deliberately designing service experiences to meet those needs, VA can improve the Veteran experience. This leads to service experiences that deliver on all our constituents’ needs: Veterans, business lines within VA, Congress, VSOs and the American taxpayers.

We spent the last 18 months on a journey to research and understand the needs of Veterans and their families. We’ve also sought to understand the needs of our VA employees who deliver those services every day.

To improve Veterans’ experience with VA, we mapped key journeys through service lines at VA from a Veteran’s perspective and identified the moments that matter most to Veterans. We then designed interventions to prevent VA from falling short during these crucial moments. We worked to improve and replicate service areas that are bright spots and to help Veterans more holistically understand all that VA offers.

We have also undertaken a series of service design improvement efforts that better enable and support our employees in delivering great customer experience. Through our research, we’ve learned that organizations with strong customer service empower employees to do the right thing for the customer in every interaction, as opposed to emphasizing rules, trainings, and supervision. As a result, we’ve taken steps to foster strong customer service by empowering our employees.

As we make changes to better meet the needs of Veterans and their families, continued measurement and review are needed to ensure that we’re hitting the mark. That said, we have an enormous opportunity, if we stay focused on this path, to achieve Secretary Bob McDonald’s aspiration to make VA the #1 customer service agency in the Federal Government. Our nation’s Veterans and their families deserve nothing less.
Veterans Experience Office (VEO) Insight Process

All of our work is organized around the Veteran’s journey. For each journey phase, we carry out an ongoing loop of learning, co-creation, and sharing out. Each activity generates tools, materials, and services that we catalog and share.
Testing prototypes of Veterans’ tools at Castle Point VA in upstate New York.
VETERANS’ EXPERIENCE TOOLS
Our work is grounded in hundreds of hours of in-person research and testing with Veterans and VA staff.

Over the past several years, VA has engaged in a series of successful research efforts to understand how Veterans and their communities engage with VA. Building on the insights and themes cultivated through these research efforts, the Veterans Experience Office embarked on a new project in September 2015 founded on the question: “How might we improve the experience of Veterans and their support networks through life transitions in a manner that anticipates and is responsive to their well-being?”

**RESEARCH PROCESS**
As part of the Veteran Experience Office’s commitment to keep Veterans at the center of every VA initiative, the team utilized a Human-Centered Design process to begin improving Veterans’ experience. Beginning with qualitative research—interviews, stimuli activities, and environmental observations—the team generated a comprehensive perspective of the life and needs of Veterans across multiple geographies, life stages, and areas of service. Ethnographic field research on Veterans and their support networks provided the team with a detailed perspective of Veterans: who they are, what they need and hope for, and how they behave.

The resulting qualitative data, coupled with expert and stakeholder interview data, provided us with Veteran-centered insights, empowering the Veterans Experience Office to develop actionable Veterans experience tools and make insightful recommendations related to the design of new or enhanced products, services, and offerings for Veterans and VA.
RESEARCH GOALS
This research effort explored behaviors, attitudes, and perceptions of Veterans and their support networks through the lens of “life transitions” to achieve the following goals:

1. **Deepen our understanding of Veterans’ life goals and needs throughout their lives**
2. **Understand key “moments that matter” in Veterans’ interactions with VA**
3. **Design and prototype interventions to collectively work toward systemic change**

RESEARCH PLAN AND OUTCOMES
To achieve our goals and generate a comprehensive understanding of Veterans’ experience, the research team curated a research sample of over 150 Veterans from around the country, and conducted a new round of in-depth ethnographic interviews with 39 participants. Out of the field research, the team developed a collection of Veterans experience tools (Journeys of Veterans Map and VA Customer Persona Ideation Cards) as a first step towards creating or enhancing new products or services to benefit Veterans.

PHASE I: DISCOVERY

A. Portland, OR  
B. Seattle, WA  
C. Chicago, IL  
D. Detroit, MI  
E. New York, NY  
F. Bethlehem, PA  
G. Arlington, VA  
H. Washington, D.C.  
I. Grottoes, VA  
J. Charlotte, NC  
K. Atlanta, GA  
L. St. Augustine, FL  
M. Orlando, FL  
N. Tampa, FL  
O. Pensacola, FL  
P. Houston, TX

PHASE II: DESIGN

Q. Denver, CO  
R. San Diego, CA  
S. Los Angeles, CA  
T. Dallas, TX  
U. Tahlequah, OK  
V. Ada, OK  
W. Baltimore, MD
Our discovery findings allowed us to build multiple new tools that capture common experiences during Veterans’ life journeys. These journey tools can be used as a starting point for designing or refining products and services.

**The Challenge**  Not all Veterans are the same, yet they often experience a broad set of shared needs and goals as they move through their lives. To serve Veterans better, VA must understand this series of needs and goals, so VA can fit into Veterans’ lives at appropriate points along their journeys, during the moments that matter most.

**Our Approach**  By sorting and synthesizing the stories of Veterans we spoke with during our research process, we developed a model for the common phases and stages of Veterans’ life experience.

**Design Solution**  We created three tools to better define and explore Veterans’ journeys: a comprehensive research report, an overview map for a Veteran life journey, and ‘deep dive’ journey maps for specific aspects of Veteran experience.

**Future Impact**  We are engaging the organization at both agency and administrative levels in collaborative working sessions to share the technique of journey mapping. These tools can be used to drive strategic planning and decision-making across the Veteran ecosystem, foster empathy with employees, build a shared language between Veterans and VA, and ultimately help change the way we do business in a way that better meets Veterans’ needs.

**HOW TO USE JOURNEY TOOLS:**

Use the three Journeys of Veterans tools to:

- Develop a shared understanding of Veterans’ experiences across VA
- Identify VA customer service gaps or bright spots along Veterans’ journeys
- Recognize where multiple VA services might touch Veterans simultaneously along their journeys
- Focus on “moments that matter” as junctures during which VA should design excellent customer service experiences and outreach opportunities
- Reference life moments as starting points for generating new products or services

“The journey map is the best thing I have ever seen come from VA.”

LES BEAVERS
Executive Director (Former), NASDVA
The Journeys of Veterans research report captures an aggregated view of Veterans’ life journeys from pre-service through death. The report describes the three phases of our journey model—Serving in and Separating from the Military, Living Civilian Life, and Retiring and Aging—which together cover 10 major life stages and associated VA services, including various moments and “moments that matter,” i.e., significant moments in Veterans’ lives during which VA can and should play a role. This information serves as a foundation on which to build a common understanding of Veterans’ experiences and can be used as a starting point for designing or refining products and services.
Journeys of Veterans Map

This map, based on our discovery findings, covers life stages Veterans 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 the associated VA services, and calls out key “moments that matter” which may have significant impact on Veterans’ experiences.

“Moments that matter” are explicitly called out across the 10 life stages. Two metrics were used to identify these “moments that matter”: 1) Veterans cited these points as major moments in their lives with long-term implications for their well-being, and 2) VA can and should play a significant or enhanced role during these moments. While “moments that matter” have heightened significance for Veterans, each moment along the map is important to Veterans’ overall well-being.

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.
Deep-Dive Journey Maps

The deep-dive maps expand each stage of the Veterans’ journey, further illuminating the varied experiences in a Veteran’s engagement with VA.

We created the deep-dive maps in collaborative journey-mapping sessions with Veterans and participants from across all VA administrations and relevant staff offices. Together, we focused on making sure we had the “doing” steps right, discussing what Veterans are thinking and feeling at these steps, the role VA currently plays, and opportunities for future research or improvements.

LOW-FIDELITY MAP
We generated spreadsheet versions of the deep-dive maps for ongoing use and revision by VA. These ‘lo-fi’ maps will allow for different key personnel or offices to input revisions in key steps, Veterans’ feelings and thoughts at these steps, VA onstage activities, and potential opportunities. There will be one VA owner for each of these maps, who will be responsible for compiling updates and integrating new insights into existing workflows.

DEEP-DIVE MAPS CREATED TO-DATE
- Enrolling in Healthcare
- Accessing Primary & Specialty Care
- Accessing Mental Health Services
- Looking for a Job
- Looking for Housing
- Furthering Education
- Filing for Disability Insurance
- The Compensation & Pension Examination (part of Disability Insurance)
- Appealing Disability Insurance Rating
- Vocational Rehabilitation
- Burying a Family Member
HIGH-FIDELITY MAP
The ‘hi-fi’ maps are professionally designed versions of the ‘lo-fi’ map content. These visualizations of the deep-dive journeys are intended for use as tools in collaborative settings, for example when teams gather to consider opportunities to improve aspects of service around a portion of the journey. Updates to the hi-fi maps can be coordinated with VE team.
PERSONA TOOLS

We generated two new tools about 10 types of common VA users—aggregate characters known in the private sector as ‘personas.’

The Challenge  Veterans’ varied backgrounds and experiences effect how they interact with VA, so VA needs to understand different expectations, requirements, and attitudes of Veterans in order to design and deliver better products and services.

Our Approach  Building on our discovery research and prior VA human-centered design efforts, we developed personas: fictitious characters combining qualities from many different real people who represent VA’s actual customers. Personas are not the same as market segments. Instead, personas capture attitudes, needs, and expectations of potential users of VA’s services.

Design Solution  We created two persona tools that explore how Veterans’ military and personal experiences shape their needs of and attitudes toward VA: a comprehensive research report with a set of 10 updated personas, and a deck of ‘ideation’ cards to allow service designers, product owners, and others to generate new ideas for responding to the needs of Veterans with different worldviews, personal qualities, military experiences, and life needs.

Future Impact  We are using persona tools in conjunction with the journey tools throughout the organization to build an understanding of a range of Veterans’ perspectives. These tools can be used to focus products and services on addressing particular Veteran needs and expectations, refine offerings to address a broader spectrum of Veterans, and ultimately create a better experience for each unique Veteran we serve.

HOW TO USE PERSONA TOOLS:

- Understand the diverse needs and attitudes of VA’s primary set of customers
- Develop fluency in describing Veterans’ experiences and a shared understanding of Veterans’ needs across the spectrum
- Recognize where VA services do a great job at or fall short of meeting different Veterans’ expectations and needs
- Identify which services have a broad impact on multiple personas and which services are more targeted
- Reference personas as starting points for generating new products or services
Personas Research Report

The VA Customer Personas research report describes 10 common VA personas. These personas are derived from hundreds of ethnographic interviews with Veterans, their families, and their service providers. This research included visits to their homes and places of work, as well as rich discussions about their lives. Qualitative research of this kind provided incredibly detailed data about not just what Veterans do or want, but why and how they live their lives and try to achieve their goals. This information serves as a foundation on which to build a more detailed understanding of how Veterans’ experiences are variable; these personas can be used as a starting point for designing or refining products and services.

Ideation Cards

The ideation cards are a translation of VA’s customer personas into user-friendly ideation or playing cards.

The ideation card deck contains four suits, including Veteran personas, life stages, military experiences, and personal qualities. The cards will be most immediately useful for people throughout VA who are in the process of designing better products, services and experiences for Veterans. Whenever possible, experienced human-centered designers should facilitate use of the cards with teams who have limited day-to-day experience with creative ideation.

The cards’ primary use is to help designers ask idea-provoking questions and generate innovative solutions. People should use the deck to: imagine and invent new possible tools and services; identify gaps in current tools and services; and think of new ways to evaluate the utility of tools and services for different types of Veterans. For example, product owners could potentially re-design VA benefit handbooks, personalizing them according to different Veteran personas, or service owners could design less-burdensome enrollment processes to align with particular Veterans’ needs.
Future Evolutions

Veteran personas and journey maps can be used to drive strategic planning and decision-making across the Veteran ecosystem. We envision VA will leverage these materials in the following ways:

**VA AGENCY LEVEL**
VA can use the journey maps and personas to assist VA Strategic Planning and Programming, OEI/OPP. These materials provide a Veteran-centric framework to orient decision-making toward a cohesive portfolio of administration activities. The journey map can also be used as a living document to track new programs and initiatives against the Veteran experience.

**VA ADMINISTRATION LEVEL**
Journey maps and personas can be used by administration and program leaders to shape efforts with the Veteran perspective in mind. These materials can provide a basis for prioritizing needs and aligning services based on Veteran experience. The journey map can also help identify VA customer service gaps or bright spots along Veteran journeys and measure improvement against “moments that matter.”
FRONTLINE EMPLOYEE TRAINING
VA can educate VA employees across all administrations about the Veteran experience with journey maps and personas, highlighting “front stage” experiences and “back stage” services. These materials can empower employees to deeply understand how their work affect Veteran experience, and provide a common language for employees to discuss Veteran-centric customer service.

ORGANIZATIONS SERVING VETERANS
Journey maps and personas can be shared across the ecosystem of organizations that help Veterans, enabling a common perspective and understanding of Veterans. These materials can provide a common language around Veteran experience, facilitate discussion and collaboration across the ecosystem, and help identify “moments that matter” where organizations could effectively partner.
VA stakeholders immerse themselves in qualitative research and brainstorm possible ways to improve Veterans’ experiences.
DESIGN SPRINTS WITH VA STAFF
VA stakeholders test persona ideation card prototypes during the “co-design” phase of the rapid-cycle design sprint.
By co-designing, we can make a significant impact on Veterans and VA employees in just one month.

All across VA, our employees are embarking on ambitious projects and doing impactful work. To amplify those efforts, our team identified some already “in-flight” opportunities, and applied a rigorous but rapid human centered design methodology to help move the work along. We were able to fold both Veteran and VA employee voices into the creation of new products, processes, and services.

OVERALL APPROACH
Our team ran three rapid-cycle design sprints that resulted in three processes: Hire Right, Hire Fast; VA Feedback Tool; and Human Resources. For each of these efforts, we applied a similar human centered methodology to drive meaningful impact. Our process looked like this:

Week 1: Discovery Research
Conducting qualitative field research to diagnose pain points, locate bright spots, and generate important insights

Weeks 2-3: Prototype Co-Design
Designing low-fidelity “testable” solution prototypes with VA Stakeholders and Veterans

Weeks 4-5: Testing & Handoff
Testing prototypes in the field, integrating findings into new prototype iterations, and handing the prototypes off to VA stakeholders

OVERALL OUTCOMES
Our team introduced a capability and supported a mindset shift in VA stakeholders interested in designing relevant products and services for Veterans and VA employees. In addition to the prototypes, we provided implementation considerations and success factors, and created warm handoffs between the design team and VA stakeholders ultimately responsible for the work.

“We both succeeded and failed at times, but we always got what we needed at the end of the day. It was an incredible but quick journey.”

THOMAS PASAKARNIS
Program Manager,
Veterans Experience
HIRE RIGHT HIRE FAST

A modification of VA’s current hiring processes enables faster onboarding of Medical Support Assistants.

The Challenge It currently takes 80 to 175 days to recruit, hire, and start Medical Support Assistants (MSAs) at VA Medical Centers (VAMCs).

Our Approach We aimed to communicate a new process to hire and fill MSA vacancies faster and with the right person, and engage the appropriate stakeholders along the way to implement the program successfully. Our team traveled to VA Puget Sound for a week of discovery research. We heard from HR staff, current MSAs, medical center directors, service line chiefs, and Veterans. Based on our research, we co-designed communication and implementation materials. We learned that having all the stakeholders in the room at the same time to work through ideas led to a better solution for all. Towards the end, we tested our materials with HR staff and hospital directors, integrating their feedback into the final handoff product.

Design Solution In the new process, HR creates a pool of pre-vetted candidates prior to an MSA job vacancy to fill the slot within 30 days of vacancy. This shift leads to faster hiring of well-qualified candidates. A Hire Right Hire Fast Primer and Implementation Roadmap were created to aid VA Medical Centers as they implement the new program. These materials walk stakeholders through the new hiring process and help VA Medical Centers consider implementation barriers.

Future Impact Five VAMC’s are successfully piloting the Hire Right Hire Fast program using the communication and implementation materials created during the design sprint.

“Going through the process of Hire Right Hire Fast created a mindset that barriers can be overcome.”

RALPH GIGLIOTTI
Network Director VISN 19,
Rocky Mountain Network
**Human Resources will be responsible to create a pre-vetted pool of well qualified Medical Support Assistant candidates.**

**PROCESS OVERVIEW**
The Hire Right Hire Fast primer provides a process overview and steps to implement the new hiring process to VA facilities.

**SUCCESS FACTORS**
The implementation materials highlight key success factors to assess the readiness of VAMCs to implement the new program.
VA FEEDBACK TOOL

The VA Feedback Tool provides a real-time and direct communication path to address both Veteran and employee needs.

**The Challenge** Veterans are confused about how to provide feedback to VA, and employees use multiple systems to track feedback—making it difficult to document and respond to feedback in a timely manner. Our challenge was to create a tool to route Veterans’ feedback to the right employees so they can respond quickly and effectively.

**Our Approach** Our team conducted research at the VA Medical Center in Baltimore to identify the current state of feedback collection and response. Collaborating with VA employees and Veterans helped us identify common issues and which employees could best address that feedback. We conducted interview sessions to gather Veterans’ and employees’ reactions to initial designs of the feedback tool and made improvements based on these reactions.

**Design Solution** A user-friendly digital tool was designed to address Veterans’ most pressing needs and the issues they encounter when interacting with VA. The tool can be accessed through a website link using a computer, tablet, or a smart-phone—either directly after their encounter with VA or on their own time. A back-end routing structure was created to address both Veteran and employee needs by bringing feedback directly to the appropriate party.

**Future Impact** The feedback tool will help Veterans feel that their voices are heard and ensure that any issues or concerns they have are resolved appropriately.

“**The feedback needs to go to the right people. When it’s not specific, it’s not actionable.**

PRIMARY CARE EMPLOYEE, Baltimore
FEEDBACK EXPERIENCE TODAY...

A MULTITUDE OF OPTIONS FOR SUBMITTING AND COLLECTING FEEDBACK EXIST
There is no unified place for Veterans to submit feedback and they are often not confident a follow-up will occur. For VA, feedback is collected in so many places it is difficult to respond effectively.

THERE IS NO CONSISTENT PROCESS FOR DIRECTING FEEDBACK TO THE APPROPRIATE PARTY
Receiving a follow-up and/or resolution to an issue can be a lengthy process with feedback passing through many hands. Patient Advocates are often required to act as the middlemen when issues need to be routed elsewhere.

THERE IS NO UNIFIED WAY TO DOCUMENT OR RESPOND TO VETERANS’ FEEDBACK OVER TIME
Feedback collection and documentation occurs in a variety of places. Feedback is distributed at different intervals and is not accessed as a whole, allowing issues to re-occur and frustrate Veterans.

FEEDBACK EXPERIENCE TOMORROW...

A UNIFIED CUSTOMER EXPERIENCE REDUCES BARRIERS AND COMPLEXITY FOR VETERANS
Rather than having to guess where they should go to get their questions answered, Veterans will have a reliable tool right at their fingertips connecting them directly to VA facilities and services.

SMART BACK-END ROUTING ENGAGES (THE RIGHT) EMPLOYEES
Back-end routing directs feedback to the appropriate party within VA, simplifying the response to Veteran feedback. This allows employees to spend less time entering and routing feedback and instead spend more time meeting and responding to Veterans’ needs.

DATA COLLECTION AND RESPONSE IS ENABLED OVER TIME
This feedback tool will provide an easier and more integrated way to gather, analyze, and respond to Veterans’ feedback over the long term.
HUMAN RESOURCES TOOLS

We identified opportunities to streamline and simplify VA HR’s organizational processes and practices.

The Challenge As VA contemplates its enterprise HR transformation, HR @ VA wanted to understand what organizational orthodoxies may be getting in the way of progress and which key moments in the employee experience are ripe for disrupting to ensure there isn’t a return to today’s norms.

Our Approach Coming out of a workshop with numerous stakeholders to scope the central issues at hand, we embedded with a combined HR and business partner team undergoing a real-time challenge for real-time observation and research—conducting over 20 interviews with Subject Matter Experts from both sides to gain deeper insight. Through our research we identified key unwritten rules that inhibit HR’s efficacy within VA and procedural assumptions that unintentionally reinforced these rules.

Design Solution Our goal was to develop scalable tools that will lower the barriers to behavior change. Specifically, we honed in on building a Strategic Conversations Toolkit to facilitate productive, structured conversations around alignment and expectations between HR and their business partners at the beginning and throughout the hiring process—to offer HR’s business partners tools to effectively start an engagement with HR and change the dynamic of initial conversations (and beyond).

Future Impact The intended outcomes include enabling HR to act as strategic thought partners, dissolving the current dynamic that obstructs real collaboration, and guiding business partners to engage with HR in a way that will ultimately achieve their own goals and outcomes.

“This initiative is the best work I’ve been involved with at VA.”

MEGHAN FLANZ Assistant Secretary, Human Resources and Administration
Public Policy Lab conducts prototype testing with Veterans at the Veterans Benefits Administration building in Manhattan.
IN-DEPTH DESIGN WITH VETERANS
Co-designing onboarding materials with Veterans.
We created print and digital materials to help Veterans navigate the potentially confusing landscape of post-military life.

The Challenge

Currently Veterans receive information about VA in a fragmented way, which creates a confusing and disjointed experience when first trying to understand and access VA services. VA has the opportunity to foster more positive and effective interactions throughout Veterans’ journeys by improving Veterans’ “onboarding” experience to VA.

We identified two opportunities to complement existing efforts and address gaps in the current onboarding experience:

**INTRODUCING VETERANS TO VA**

To help Veterans answer the question “What can VA do for me?,” we explored new ways to orient both recently-separated and long-time Veterans to VA benefits and services. We tested components including a welcome letter and other communication materials that give Veterans a broad overview of when and how VA might be useful in their lives. We included resources and contact information for each service to help Veterans get their questions answered online, over the phone, and in person.

**HELPING VETERANS GET STARTED**

To help Veterans answer the question “How can I get help for specific needs?” we explored ways to help Veterans take immediate steps to access specific services such as obtaining primary health care or applying for disability compensation. This objective builds on the first effort by providing in-depth and actionable information about how to access VA services. We tested step-by-step checklists to access a benefit or service, as well as other key pieces of information about eligibility and related programs.
Our Approach

Through an iterative testing and design process, we created over 10 version of the prototypes, incorporating feedback throughout the process from over 150 Veterans.

EXPLORATORY RESEARCH

We began our process by interviewing, co-designing, and testing the value proposition of potential tools. Over two weeks, we conducted a mix of in-depth and intercept interviews with Veterans in Denver and New York City. During interviews, we asked Veterans to briefly tell us their story, invited them to participate in a card-sorting activity, and tested the value proposition of a low-fidelity prototype.

KEY FINDINGS

• Provide a manageable, yet broad, view of what VA offers so Veterans can identify programs and services that might apply to them both now and in the future
• Provide the first steps for a Veteran to take towards receiving access to a prioritized list of care, programs, services or benefits
• Be extremely clear about what to expect in the process, how long it will take, and what documents are required
EVALUATIVE TESTING & ITERATION
To test and refine our initial concepts, we followed an iterative testing and design process. We conducted testing cycles in California, Colorado, Michigan, Texas, and Oklahoma. During the testing, we presented in-progress prototypes to a mix of recently separated Veterans, currently separating service members, long-time Veterans, and re-engaging Veterans. In between rounds of testing we incorporated feedback into revised versions of the prototypes.

KEY FINDINGS
- Allow Veterans to quickly grasp what VA offers and see how VA can help throughout their lives
- Use simple, direct, and actionable language for ease of comprehension
- Engage Veterans with a friendly and welcoming tone and accessible design
- Present information in clear and digestible amounts, making it easy to quickly get to the most relevant information
Design Solution

The result is a set of communication materials introducing VA to Veterans and their supporters.

A WELCOME LETTER
A one-page letter, signed by Secretary Bob, welcomes Veterans into VA and lets them know someone cares.

B WELCOME GUIDE
A lightweight booklet introducing Veterans to what VA has to offer, where and when VA can help throughout their lives, and the first few steps to take to get started with VA.
QUICK START GUIDES
Templatized, front and back one-pagers provide simple, actionable, and step-by-step information to help Veterans apply for or get started with specific services.

LOCAL RESOURCES
A one-page template allows VE district field officers to create a comprehensive and personalized list of local people and places who can help along the way.
Testing the utility of Quick Start Guides.
Future Impact

If implemented successfully, these tools will:

**PROVIDE ACTIONABLE TOOLS**
Veterans seek tools that can help them navigate a complex landscape of benefits and services, such as detailed checklists and specific actions to take to access a service.

**BRIDGE THE GAP**
Veterans need this information close to separation, before they may even know about resources like ExploreVA or Vets.gov. These new materials will point Veterans in the direction of these helpful resources.

**PRESENT A HOLISTIC VIEW OF VA SERVICES**
Veterans want a quick, “at-a-glance” understanding of ALL VA offers and then be able to quickly get to the information that is most relevant to them and meets their individual needs.

**INTEGRATE MULTI PLATFORMS**
Veterans expect both physical and digital tools to assist them in navigating VA. While many recent Veterans are digital natives, they also want paper-based tools to store in one place and facilitate conversations with VA representatives.

“
I would want this to occur before and during separation. If they give it to you after, it would be like packing your parachute after you jump out of the plane.

VETERAN
NYC
Future Veteran Experience

We heard from Veterans that they want the materials to be available in many different formats and places. They want the information presented before transition, but also want to have access to the material through other mediums. We imagine the following scenarios:

**IN THE MAIL**

Nick is getting ready to separate from the military in a few months, and is trying to plan his next steps. He receives a packet in the mail with a letter from Secretary Bob welcoming him to VA, a guide that gives him an overview of VA benefits, and a curated set of Quick Start Guides for services most relevant for separating Veterans. Nick reads through the materials and starts applying for services.

**ONLINE**

Chelsea is doing some research on VA benefits and comes across the Welcome Guide online. She clicks through to the section called “Starting Up” because she recently separated from the military and starts to consider applying for disability compensation. Then she follows the link to the “Apply for a Disability Rating” Quick Start Guide and finds a checklist which helps her get started.
WITH A COUNSELOR
Kate is preparing for her separation from the military in a few weeks. As part of processing out, Kate meets with a counselor in the transition office who talks her through the journey map in the Welcome Guide. They discuss what VA services might make sense for Kate at this stage in her life. Kate is interested in the GI Bill, so the counselor gives her the Quick Start Guide for education benefits to help her get started with the application process.

AT A FACILITY
Richard is in the waiting room at his VA Regional Benefits Office when he notices a rack of Quick Start Guides. He’s curious about disability benefits, so he walks over and picks up one that says “Apply for a Disability Rating.” Richard takes the paper over to the receptionist to find out more, and she gives him a copy of the Welcome Guide and a sheet of local resources to help him get started.
Future Onboarding Landscape

To provide a more holistic Veteran experience, these onboarding materials are intended to fill gaps and augment information distribution in VA’s current onboarding experience.

**CURRENT DISTRIBUTION**

**FILL GAPS**
Welcome and Quick Start Guides fill gaps in the Veteran experience during key “moments that matter” to present Veterans with a holistic view of VA benefits.

**AUGMENT**
Onboarding materials augment existing information by providing a starting point to orient Veterans to VA, promote and link to more detailed information sources, and enable warm hands-offs between services.

**REPLACE**
Onboarding materials will potentially replace current mailing such as the Welcome Home and FOLL Packets, plus locally developed resources that have been created in the absence of national level information.

**DISTRIBUTION CHANNELS**
- In-person
- Online
- Phone
- Mail

**12 months After Joining**
- **DURING SERVICE LETTERS**
  Notifies active service members of certain benefits and includes brochure on GI bills

**During Separation**
- **TAP**
  Briefs separating service members on VA benefits and services and provides customized career planning

**6 months Pre-Separation**
- **SECRETARY WELCOME KIT**
  Provides service members preparing to separate an overview of VA benefits, and checklists for how to get started
AVAILABLE ONGOING SUPPORT

Vets.gov
Acts as a one-stop shop for benefits information and application access

EXPLOREVA
Presents digital information on the breadth of VA services available

BENEFITS CALCULATOR
An interactive tool to help Veteran determine benefits eligibility

eBENEFITS + MYHEALTHVET
Allows Veterans to apply, research, and manage benefits online

VSO SUPPORT
Connects Veterans to peers, mentors and VSO reps to guide them through benefits process

LOCAL FACILITY DISTRIBUTION
Provides Veterans with local information

WELCOME HOME PACKET
Welcomes Veterans to VA with the VBA benefits handbook, and a timeline on how to apply for benefits

FOLL PACKET
Reminds Veterans they may be eligible for benefits with follow up documents

HRC CALL
Invites Veterans to schedule an appointment

VHA HANDBOOK
Provides personalized information

AFTER STARTING UP
Future Evolutions

Over time, VA can increase the impact of these onboarding tools by continuing to develop them and integrate them with existing VA materials and processes. We envision that these onboarding tools will evolve in the following ways:

**QUICK START GUIDE MOBILE APP**
Access interactive checklists, links, and resources from a smart phone.

**INTERACTIVE ONLINE FORUM**
Read and share tips and feedback from Veterans on online versions of the tools.

**INTEGRATION INTO TAP**
Augment or replace current TAP materials with Welcome Guide and Quick Start Guides.

**REDESIGN OF VBA/VHA HANDBOOKS**
Redesign VBA and VHA handbooks to reflect new design and taxonomy of needs.
EXTENSION OF VETS.GOV
Host interactive versions of Quick Start Guides on Vets.gov.

OMNICHANNEL PROMOTION
Promote onboarding tools through official VA channels (print, digital, social media).

OUTPUT OF BENEFITS NAVIGATOR
Include Quick Start Guides as resources alongside outputs of the explore VA navigator.

INTEGRATION INTO EMPLOYEE ONBOARDING
Integrate tools into HR employee training to facilitate strong customer service.
Implementation Recommendations

To implement these onboarding tools successfully we recommend conducting small-scale pilot tests to validate their value to Veterans and make final necessary improvements before widely distributing. The goal of the tests will be to understand if the onboarding tools improve the Veterans experience, positively impact their perception of VA, and increase accessibility to VA benefits and services, leading to increased trust in VA.

WHAT WOULD WE TEST?
The pilots would address a number of key uncertainties and inform how to improve the tools and make them more useful for Veterans.

- Are Veterans using the tools? How are they using them?
- Do the tools provide clarity and simplify Veterans understanding of VA benefits and services?
- Are the tools inspiring Veterans to seek more information and take action?

HOW WOULD WE TEST?
To address key uncertainties and test the value of the tools to Veterans, we recommend conducting two small-scale pilot tests (e.g., 50–100 participants each). Both tests will inform how to distribute these materials to Veterans to maximize value, while simultaneously reaching all intended audiences to understand Veteran use of the tools. We recommend carrying out the tests over a period of time (e.g., 3–6 months) so that Veteran behavior, adoption, and engagement with the tools can be observed and evaluated over time. Data-driven evaluations (e.g., surveys and observational interviews) will inform additional iterations of the tools for continuous improvement and refinement.
PILOT TEST 1: IN THE MAIL
To test the impact of the onboarding tools on Veterans during separation, we recommend distributing the Welcome Letter, Welcome Guide, and a curated set of Quick Start Guides to a small sample of separating Veterans and their supporters (n=25–100) via mail. To evaluate success, we recommend testing with Veterans at three, six, and twelve months through brief surveys and short interviews. Both qualitative and quantitative data will indicate how Veterans are using the tools, if they simplify their understanding of VA benefits and services, and how the tools are inspiring action.

PILOT TEST 2: AT LOCAL FACILITIES
To assess staff readiness to facilitate use of the tools as well as understand how a broader audience of Veterans and supporters may use the tools, we recommend distributing the Welcome Guide, Quick Start Guides and Local Resource Guides at local facilities (e.g., VAMCs or VSOs). To measure success, we recommend monitoring behavior of both staff and Veterans over time through observation and intercept interviews. Qualitative data from these evaluation methods will indicate how facilities are using the tools to facilitate engagements with Veterans as well as how Veterans are using the tools to access services.

HOW DO WE GET STARTED?

PREPARE
- Design testing plans
- Recruit Veterans
- Set up data collection systems
- Revise testing plans as needed

EXECUTE
- Distribute materials
- Carry out testing
- Begin evaluation

EVALUATE
- Complete evaluation
- Document process, impact, and responses
- Iterate on materials
- Repeat process for continuous evaluation
DEVELOPED BY THE VETERANS EXPERIENCE TEAM

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All photos were taken during research that contributed to the creation of this document. Photos of any Veterans and their families were taken with permission of the interviewee. Participants of this research voluntarily participated. Names have been changed to anonymize data.
How is the Veterans’ Experience Office exploring new ways to improve Veterans’ services?

Over the course of its first year, VA’s Veterans’ Experience Office has used human-centered research and design approaches to develop a wide range of new tools and services, improving VA experiences for both Veterans and VA staff.

PG 5 EXECUTIVE SUMMARY
Read a quick overview of our process and results.

PG 9 VETERAN EXPERIENCE TOOLS
See how we used in-depth ethnographic research to develop five useful new tools for designing better Veteran services.

PG 23 DESIGN SPRINTS WITH VA STAFF
Check out the three rapid design projects we conducted with VA staff, and see prototypes of the new tools and services we developed to improve VA hiring and Veteran feedback.

PG 33 IN-DEPTH DESIGN WITH VETERANS
Learn how we carried out a collaborative design process with Veterans across the country to develop a set of new tools to make it easier to ‘onboard’ into VA services.