

Journey research

Veteran and active duty service members, education benefits



U.S. Department of Veterans Affairs
Office of Information and Technology





Research overview

Veteran and active duty service members, education benefits



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Research goals

Education benefits customer journey

How do Veterans and service members plan their education?

This is a wide look across how Veterans & active duty service members learn about education benefits, decide to go to school, and orient themselves to necessary information along the way.

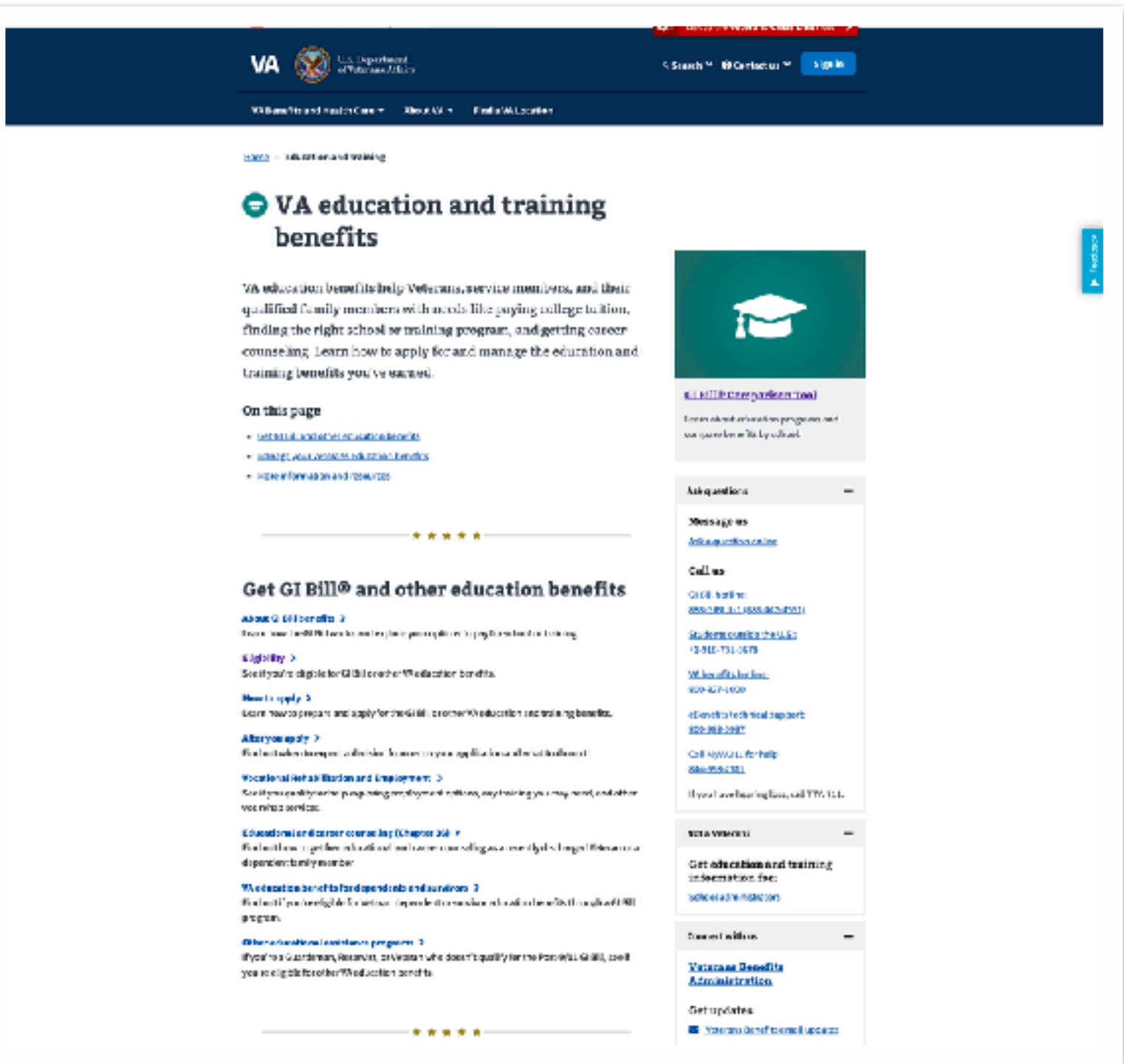
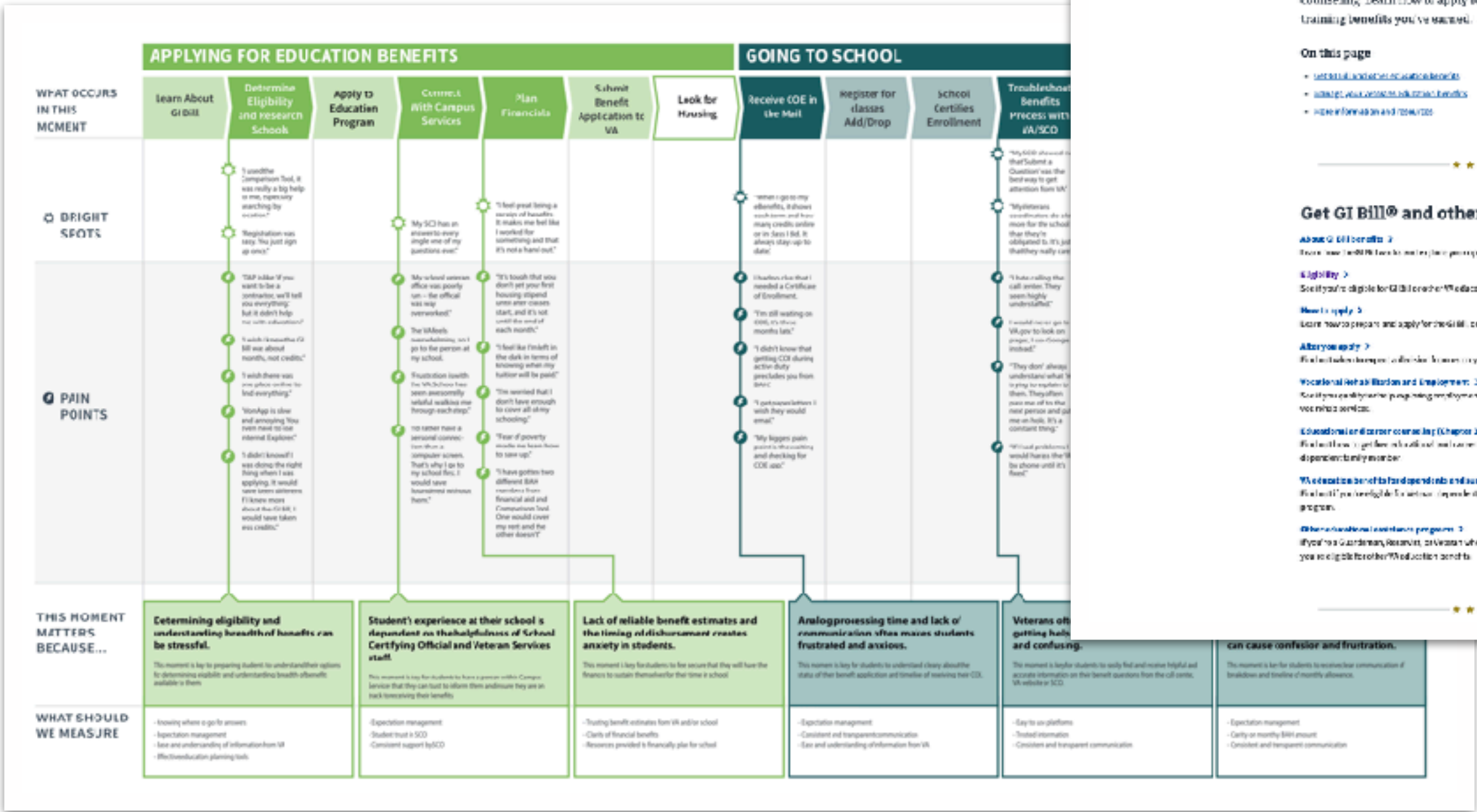
Between transition programs, VA materials, non-official materials, and personal networks what do they use and who do they trust? What works well for them in their process? Why or why not?

Building on prior efforts

Education benefits customer journey

This research was built upon a foundation of previous work performed by the Veteran Experience Office (VEO) and the Digital Service Veteran’s Affairs (DSVA) team.

The work assumes the customer journey as defined by previous VEO research is a foundation for further refinement, and focuses on the “Get Benefits” portion of the information architecture of VA.gov.



Hypotheses

Education benefits customer journey

It may be possible that...

Official military and VA materials do not do a sufficient job of providing enough context for users to feel confident.

Human beings play a more significant role than digital content and tools (at [VA.gov](https://www.va.gov) in the education hub) in supporting educational planning and decision making.

Content and tools do not yet successfully convey program changes as a result of the the Colmery Act.

Content and tools are not clearly aligned to a job that Veterans, service members, or school certifying officials (SCOs) need done for them.

Content and tools may be under utilized.

Content and tools are not structured in a way that is compatible with the “mental models” of Veterans and service members who are pursuing their educational and career goals.

Methodology

Education benefits customer journey

Research was conducted via **18 interviews and sessions observing usage of the web**. We spoke with and observed a blended group of **Veterans, active service members, and reservists** who plan on using and/or are using educational benefits. We also spoke with **school certifying officials (SCOs)** for schools identified by the previous audience. Findings blend what the target audience *says that they do* in their education research and planning with real time observation of *actual behaviors* using the web.

Across multiple users/people, common patterns create a **customer journey** which includes

- Key phases of the process
- Tasks that fall under each of the phases
- The Veteran or service member's emotional state along the journey
- Critical channels of communication where Veterans and service members seek out information

Based on this journey a number of **“what if” scenarios** are defined by what would streamline the process or address key pain points. These scenarios can be used in planning and prioritizing efforts (**epics and related user stories**) to improve the experience. At the end of the report, the scenarios are organized by level of effort from highest to lowest.

Limitations of methodology

Education benefits customer journey

This method helps us construct a larger scale mental model for the customer experience, and then align product improvement efforts to that model. It does not go in-depth into different personal approaches to a process, and therefore does not create sufficient data for design personas, “market segments,” or other kinds of segmentation guidelines.

It does provides limited guidance on usability improvements of key products, but it does not target a contained flow within a much larger process, such as a single benefit application. For those kind of insights, we recommend breaking tasks down into individual usability research efforts.

Journey stages

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What are “journey stages?”

When VA defines different phases or stages in a process, VA often takes the *business perspective* by asking questions like

- How is our staff structured to support the process; what teams are tasks with what work?
- Have customers submitted the correct form yet?
- Do customers have the necessary background materials?

By looking at the steps that *customers believe* that they take, it reveals insights to make the experience better for *customers*, including

- Areas where the service provider can provide more or better information
- Parts of the process that are difficult or create anxiety
- Efforts we are making that customers don't expect of us
- Efforts we aren't making that customers do expect of us

JOURNEY STAGES

How to read journey stages:



Description of the Veteran’s mindset, key questions, or process during a single stage.

JOURNEY STAGES

**Discover
benefits**

How does a Veteran first learn about benefits?

**Decide to
attend
school**

What motivates a Veteran to choose to advance their education?

**Compare
schools**

How do Veterans compare and contrast schools in support of their education goals?

**Select
school**

What factors make the difference between a first choice school and other choices?

**Research
benefits**

How do they confirm what benefits they have, and if the benefits will be appropriate for their educational goal?

**Apply for
benefits**

What are the steps in applying for benefits, as seen by a customer ?

**Apply to
school**

What are the steps in applying to a school, as seen by the customer?

JOURNEY STAGES

Although the journey is experienced linearly for an individual, it is not always a linear process, and it isn't the same for everyone.

These steps do not always happen in this exact order and aren't necessarily discreet from one another. Although customers see them as different phases, they may bounce between them, repeat steps, and go in a different order than a "standard approach."



An active military member already knows that a desired school is covered.



A Veteran discovers his first choice school isn't covered by benefits.



Tasks by journey stage

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Tasks by journey stage

Education benefits customer journey

In each stage of the journey the customer performs a variety of tasks. Not all tasks are required and although they are listed in a likely sequence, the sequence will vary for different customers, including some dropped or skipped tasks. In addition, there are some tasks that are repeated for different stages.

Discover benefits



Learn about
benefits from a
person

Receive benefits
information as
part of military
recruiting

Receive formal
benefits
orientation while
on active duty

Receive formal
benefits
orientation during
transition from
active duty

Develop
confidence
understanding
benefit options

Choose (or switch
to) a specific
benefit, most
commonly switch
from Montgomery
GI Bill to Post 9/11
GI Bill

Decide to attend school



Assess costs, especially out-of-pocket costs

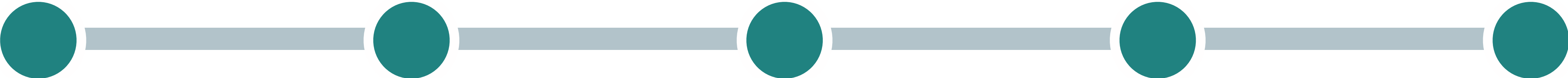
Consider logistical factors, such as location/ accessibility or family commitments

Discuss options with friends, colleagues, and family

Consider attending school before transition, while in reserves, or after transition

Identify interest in a specific career or area of study

Compare school options



Select type of degree or certificate

Compare degree/certificate program specifics between schools

Decide between online, in-person, or both

Discuss options with friends, colleagues, and family

Consider known schools versus unknown schools

Select a school



Compare based on reputation

Compare based on logistical factors, such as location/ accessibility or travel around family commitments

Compare based on cost, especially out-of-pocket costs

Compare based on services specific to Veterans

Contact school’s Veteran or military support office

Research benefits



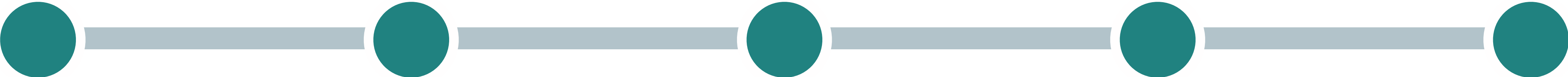
Evaluate benefits against personal budget requirements/ out-of-pocket costs

Evaluate Veteran-specific qualities of the school provided by VA

Confirm benefits directly with the school

Confirm benefits with local VA support or with the VA (e.g. call the hotline, visit the [VA.gov](https://www.va.gov) website)

Apply for benefits



Collect benefit application materials

Get help with application from school

Get help with application from local VA support or VA (e.g. call the hotline, visit the [VA.gov](https://www.va.gov) website)

Do it all by themselves

Submit application

Apply to school



Collect materials, including Certificate of Eligibility (COE) letter

Get help with application from school

Get help with application from local VA support

Transfer military credits

Transfer non-military credits

Submit application

Veteran emotional journey

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Veteran emotional journey

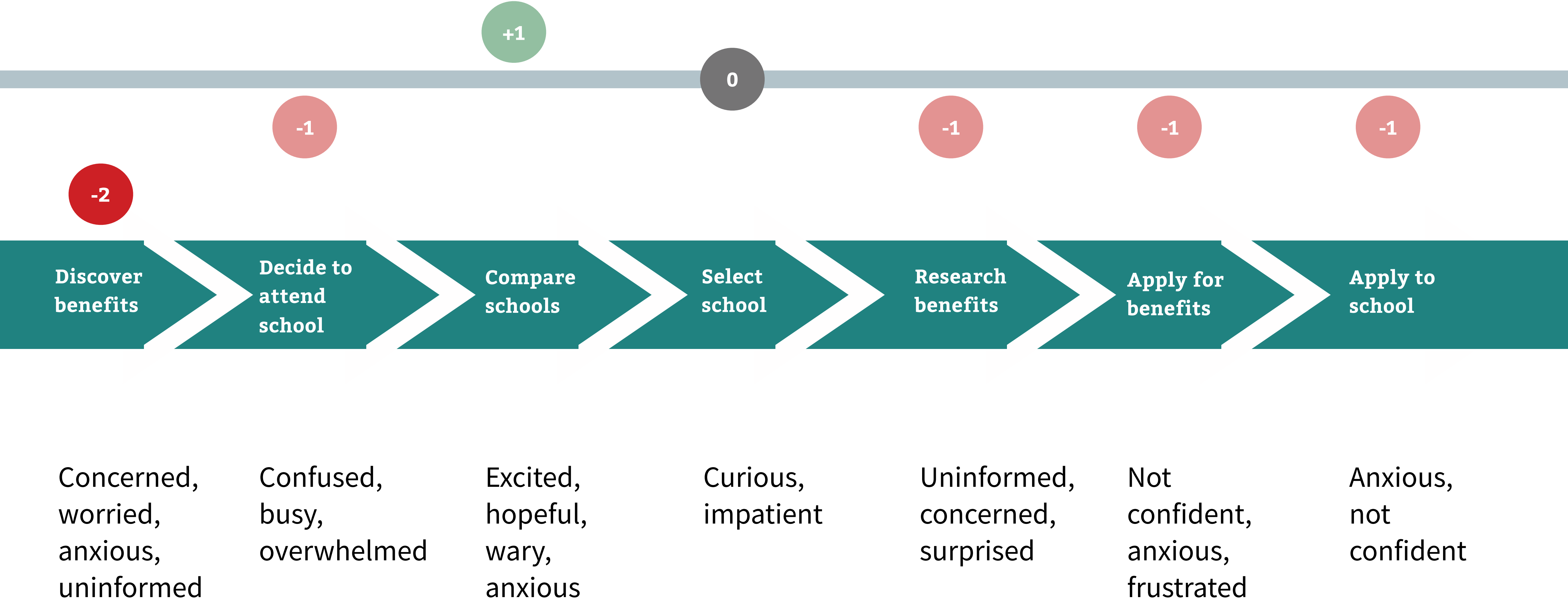
Education benefits customer journey

It's not possible to invest effort in every stage and every task across the entire journey. But we don't have to do that.

A customer's emotional state — how strongly positive or negative they feel and what may cause those feelings — guides the relative level of effort we can put into improving Edu content and digital products used in each phase.

Insights into how Veterans feel can also help us adjust our voice and tone appropriately, so that we use the right language at the right time.

VETERAN EMOTIONAL JOURNEY





The journey across channels

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The journey across channels

Education benefits customer journey

Imagine someone helps you through a process...

...you might speak to them in person informally, through text messages or e-mail, through websites and documents you share, in the context of specific events, and more. Our research demonstrated that customers occupy specific channels across this journey, and in each channel, have specific styles of conversation (such as informal or formal), use different technical

platforms (e-mail, websites, etc.), and behave in certain ways (such as how they format a search term or phrase).

Veterans and active duty service members receive and provide information that helps them make decisions through this experience by using four channels:

Military/Department of Defense (DOD) Programs

Conversations

Websites

E-mail

Note: each section lists channels from most to least influential and/or impactful.

Discover benefits

Military/DOD programs

Prior to enlisting

- Recruitment programs

During service

- Boot camp

Prior to transition to Veteran status

- TAPs (all branches except marines)
- Executive TAPs (Officer ranking individuals, all branches except Marines)
- TRS (Marines)
- STEPS Program (All branches)

- Custom programs, such as “Accessing Higher Education Benefits” classes or “Dress for Success” programs

“ Only 30 minutes of 2 days (TAPs) were about education benefits.

“ TAPs was only about disability.

Conversations with...

During service

- Officers
- Family members who are active duty and/or Veterans

After transition to Veteran status

- Family members who are active duty and/or Veterans
- Coworkers
- Vocational rehabilitation counselors at their local VA facility

“ I learned about benefits from my father/brother/friend who is a Veteran.

“ I was contacted by Disabled American Veterans and encouraged to go to school.

Discover benefits

Websites

Prior to enlisting

- VA.gov - clicked on “Check my Post 9/11 GI Bill Benefits”

This is a usability issue. Clicking on this will not actually provide the information about the benefits, it provides information about the status of an application.

“ I researched educational benefits on my own.

E-mail

No Veterans or service members reported learning about their benefits via e-mail. Although they were not reported as such, personal e-mails may play a role via conversations.

Discover benefits

What experiments could we run to have greater impact on how Veterans learn about benefits?

Veterans Affairs could...

- Develop consistent, plain-language educational benefits content that is crafted for an audience of Veterans and active duty service members.
- Based on that content, develop/update train-the-trainer guidelines for discussing that content with usage guidelines (e.g. when discussing A, refer to B). This would be equivalent to a document like the SCO handbook, but for more generalized usage.
- Distribute that content for use in Military and DOD recruitment, boot camp, and transition programs.
- Collect contact information for customized programs and distribute/promote that content to those programs (e.g. via an e-mail newsletter.)
- Treat education benefits content and “train-the-trainer” guides as a digital product, identify internal owners/teams, and support this product with appropriate skillsets, and when necessary, contractors.

Decide to attend school

Conversations with...

Prior to enlisting

- Recruiters

During service

- Education specialists (on base)
- Officers
- Family members who are active duty and/or Veterans

After to transition to Veteran status

- Other Veterans
- VA Vocational Rehabilitation Counselors

- Family members who are active/ Veterans
- Organizations outside the VA that support Veterans, such as Disabled American Veterans (DAV)

“ My officer recognized my writing ability.

“ My coworkers inspired me to advance my career.

Military/DOD programs

Websites

E-mail

No Veterans or service members reported making a decision to attend school as the result of a military or DOD program, use of the web, or e-mails. Although they were not reported as such, personal e-mails may play a role via conversations.

Decide to attend school

What experiments could we run to have greater impact on how Veterans decide to attend school?

Veterans Affairs could...

- Develop consistent, plain-language educational benefits content that is written for the audience of Veterans and active duty service members.
- Distribute that content regularly to School Certifying Officials (SCOs) and school Veteran support offices, possibly via an e-mail newsletter.
- Distribute that content regularly to Vocational Rehabilitation Counselors in local VA facilities, possibly via an e-mail newsletter.

Compare school options

Websites: search terms

Google search terms

- schools/colleges in [area of study]
- [state name] schools/colleges
- online schools/colleges in [area of study]
- [school/college name]
- [state name] average tuition per semester
- military friendly schools for [area of study]
- [school/college name] [area of study]

I prefer/trust a .org site.

General websites

- Discussion boards and forums related to an area of study
- TheBestSchools.org (look for military friendly score)
- USNews school ratings (look for military friendly score)
- CollegeCostCompare.com
- LinkedIn.com (find graduates who are Veterans)
- securitydegreehub.com (and other domain specific “link farm” sites)
- Joint Services Transcript system
- VA.gov - clicked on “Check my Post 9/11 GI Bill Benefits” (usability issue)

Educational institution websites

- Look for “military” or “veterans”
- Look for school fact sheet
- Look at course descriptions in [area of study] across schools
- Submit a “Contact Me” or “Request Info” form
- Read Veteran Support Office pages
- Look for Yellow Ribbon information

I would see if there is a reserve unit nearby.

I would look for a military friendly score.

Compare school options

Conversation with...

During service

- Family members who are active duty and/or Veterans

After transition to Veteran status

- Other Veterans
- Family members who are active duty and/or Veterans

“ Other Veterans went there, and say good things about (a specific school).

“ My uncle/ex-wife went to school there.

E-mail

- Contact the school via public e-mail address for military/veterans.
- Fill out a contact form; be contacted via e-mail.

“ I would wait for them to contact me via e-mail. They usually contact me within a few hours.

Military/DOD programs

No Veterans or service members reported comparing school options based on information learned from a military or DOD program.

Compare school options

What experiments could we run to have greater impact on how Veterans compare school options?

- Add an Apply for Benefits button to the Comparison Tool (CT) school profile page.
- Simplify and restructure the CT school profile page against the highest priority elements as identified by Veterans
 - Tuition
 - Housing allowance
 - Yellow Ribbon programs
 - Veteran support programs/office
 - Veteran graduation rate
- Assess the SEO of CT school profile pages against the most common Google behaviors of Veterans and service members. Redesign (or build in parallel) the profile page to prioritize appropriate content.
- Create custom SEO optimized landing pages for key Veteran comparison search behaviors. Example: list the most attended Veteran schools, or list schools that are receiving the fewest Principles of Excellence complaints.
- Partner with a school ranking site to improve CT data accuracy, surface CT profile content (such as Principles of Excellence complaint rates, benefit rates, etc.)
- Create functionality and editorial reminders for schools to self update with VA review and approval.
- Provide direct links from school sites (Veteran support pages) to the VA CT profile page for that school by giving them embeddable, VA branded code (e.g. a badge) that reads something similar to “Estimate your GI Bill Benefits for [School/College]”
- Create a capability within the comparison tool to select and compare school profiles by variables (e.g. tuition, housing benefit). This functionality currently exists in the form of filtering, but it isn’t explicitly user-driven because it doesn’t task the user with making a selection of what variables to compare.
- Create a map view for the CT showing schools based on geographic location similar to Columbia University's Veteran Transition Tool (<https://ahemap.veterans.columbia.edu/>);
- Integrate school and CT data points into the facility locator.
- Purchase (or request a donation of) Google Ads for search combinations that do not favor a particular school but are aligned with search behaviors.

Select a school

Conversations with...

- School certifying official (SCO)
- School's Veteran support staff member
- School's admissions staff member

E-mail

- School certifying official (SCO)
- School's Veteran support staff member
- School's admissions staff member

Websites

- [Preferred institution name] website
- Joint Services Transcript system

Military/DOD programs

No Veterans or service members reported selecting a school based on information learned from a military or DOD program.

Select a school

What experiments could we run to have greater impact on how Veterans select a school?

There are no aspects of this interaction that directly involve — or need to involve — VA. The final selection of a school is primarily a dialogue between the school and the (Veteran or service member) student, or their trusted personal network. Furthermore, excessive effort in this area could violate laws regarding the Use of office for private gain, specifically around the appearance of government sanction or endorsements. Therefore, VA could...

- Add data and/or highlight information about which schools accept military transcripts to the CT.
- Minimize efforts in this area. Eliminate content on va.gov, benefits.va.gov, and other VA websites that's devoted to school selection. VA is not where Veteran and active duty students make this decision. Investing time and energy in this space does not align with the natural behaviors of Veterans and students.

Research benefits

Websites

- VA.gov and related websites
 - GI Bill Comparison tool

Conversations with...

- School certifying official (SCO)
- School's Veteran support staff member
- School's admissions staff member

“ I would confirm Yellow Ribbon with the Veterans support Office at the school.

E-mail

- School certifying official (SCO)
- School's Veteran support staff member

“ I would call or e-mail the school Veteran's office.

Military/DOD programs

No Veterans or service members reported selecting a school based on information learned from a military or DOD program.

Research benefits

What experiments could we run to have greater impact on how Veterans research benefits?

Veterans Affairs could...

- Add an Apply for Benefits to the Comparison Tool (CT) school profile page.
- Simplify and restructure the CT school profile page against the highest priority elements as identified by Veterans
 - Tuition
 - Housing allowance
 - Yellow Ribbon programs
 - Veteran support programs/office
 - Veteran graduation rate
- Assess the SEO of CT school profile pages against the most common Google behaviors of Veterans and service members. Redesign (or build in parallel) the profile page to prioritize appropriate content.
- Provide direct links from school sites to the VA CT profile page for that school by giving them embeddable, branded code (e.g. a badge) that reads something similar to “Estimate your GI Bill Benefits for [School/College]”

- Address usability issues for the CT tool identified in this research, including
 - Name match issues (UMBC, for example)
 - Clarify in-state vs. out-of-state benefits for public schools
 - Reduce confusion by changing or eliminating null data (currently reads “no data”)
 - Address graduate vs. undergraduate cost and program-specific cost expectations
 - Improve design of student outcomes
 - Support zip code search
 - Address non-traditional semesters (summer, winter, trimesters, etc.)
 - Display program information by school

Research benefits

What experiments could we run to have greater impact on how Veterans research benefits?

Veterans Affairs could...

- Address usability issues for the Edu hub identified in this research, including
 - Label confusion around “Check post 9/11 Benefits.” This is to check the status of benefits, not the benefits themselves. Revise to “Check status of Post 9/11 benefits application” or similar
- Rename or provide explanatory content for “Careerscope,” or make plans to retire the name. Some Veterans thought this referred to graduate programs. Others ignored it completely.

Apply to school

Conversations with...

- School certifying official (SCO)
- School’s Veteran support staff member
- School’s admissions staff member

Military/DOD programs

Websites

E-mail

No Veterans or service members reported applying to a school as the result of a military or DOD program, website, or e-mail interaction. It is likely that e-mail interactions were contained within the conversations reported, however.

Apply to school

What experiments could we run to have more impact on how Veterans apply to school?

This is a context where how we support SCOs actually empowers us to support Veterans more efficiently, and potentially have a big impact on one of the largest pain points: the amount of time it takes to get approved for benefits, which most schools advise doing *prior* to the school application process.

To support faster school application, Veterans affairs could...

- **Create a digital Certificate of Eligibility (COE) confirmation process**

Create a digital workflow for SCOs to authenticate and confirm Veteran benefit eligibility status, eventually eliminating the need for a paper COE. This could be implemented both pre- and post- applying to a school. Investigation with the Veteran developer API efforts is required to assess the ability for APIs described within developer.va.gov to support this business process.

Apply for benefits

Conversations with...

- VA Hotline
- Local VA support
- School certifying official (SCO)
- School’s Veteran support staff member
- School’s admissions staff member

Military/DOD programs

Websites

E-mail

No Veterans or service members reported applying for benefits as the result of a military or DOD program, website, or e-mail interaction. It is likely that e-mail interactions were contained within the conversations reported, however.

Apply for benefits

What experiments could we run to have more impact on how Veterans apply for benefits?

Veterans Affairs could...

- Run quarterly usability testing on all benefit applications towards iterative improvement, including all live benefits applications (1995, etc.) and make iterative improvements based on the results.
- **Assess interest in chat based support**
A chat bot with natural language processing could answer common call center questions around benefits, including basic steps, requirements, and (with authentication) Veteran and application status. This experiment could be run by
 - Serving live text chat to a limited percentage of people in flow for application to assess willingness to get help this way (% of requests over time)
- **Create a digital Certificate of Eligibility (COE) confirmation process**
Create a digital workflow for SCOs to authenticate and confirm Veteran benefit eligibility status, eventually eliminating the need for a paper COE. Investigation with the Veteran developer API efforts is required to assess the ability for APIs described within developer.va.gov to support this business process.