



# Navigating Military Transition Recommendations & Findings Report

## ***Sprint 1A: Transition Process***

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A summary of recommendations and findings from research and solution(s) designed to improve the experience of transitioning out of military service.

Conducted by  
the President's Management Agenda (PMA) Lifecycle Journey Team

Department of Veterans Affairs in collaboration with Departments of Defense, Education, Housing and Urban Development, Labor, as well as General Services Administration, Office of Management and Budget, Office of Personnel Management, and Small Business Administration.



**US** BY THE PEOPLE  
FOR THE PEOPLE  
WITH THE PEOPLE

December 2022

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## EXECUTIVE SUMMARY

Beginning in October of 2021, cross-agency partners embarked on a discovery research initiative that explored how customers currently experience military transition. That research yielded 7 key insights, 4 customer personas, a map of the transition journey, and identification of 4 key areas of opportunity for improvement; which include: navigating the transition process, planning for life after the military, right-sizing and timing educational content, and curating personalized resource connections.

### The First Area of Opportunity

Customers relayed that they struggle to understand what action steps are most important, and when they should be taking them; and are often overwhelmed by the number of resources and services they might need to navigate. So, in September of 2022, as part of the President's Management Agenda (PMA) Lifecycle Journey initiatives and in response to Executive Order 14058 – Rebuilding public trust in government, representatives from 9 federal agencies and 5 military service branches launched the first of 4 Human Centered Design (HCD) improvement efforts.

### Solution Design Questions

**How Might We** simplify identification of customer goals and alignment with available resources early and often in Service members' careers so that identifying and acting on post-transition plans is easier despite competing priorities?

**How Might We** simplify post-transition hand-offs / tracking and communications so that needs can be identified / assessed and additional resources and actions can be provided to Veterans during or after separation?

To answer these questions, the cross-agency team rallied around a digital solution that might expose and consolidate data aggregations from multiple agencies and deliver the right information and resources at the right time based on the customer's own plan / career path. The team improved and validated its concept through multiple rounds of testing and design iteration based on new learnings and feedback from customers.

## Recommendation(s) Summary

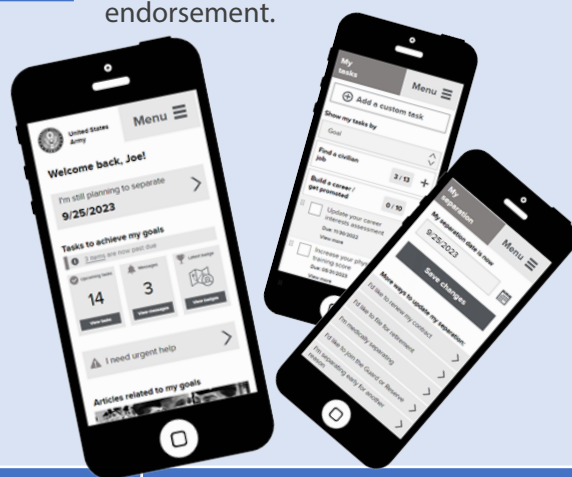
Based on its findings, the cross-agency PMA team recommends the following for approval:



Acceptance of digital prototype for further development in preparation for piloting; which includes working with platform owners and field-level experts to map content, planning, and resource data requirements.



Agreement that a pilot would also include directive, policy and/or process support to increase commander awareness and endorsement.



Category	Estimates for Piloting
Costs	<ul style="list-style-type: none"> <li>TBD in the next phase if approved to proceed</li> </ul>
Staffing	<ul style="list-style-type: none"> <li>1 x Product Manager</li> <li>1 x Operations / Development Team</li> <li>Partnership with support call center</li> <li>Partnership with field support offices</li> <li>Partnership with a comms team</li> </ul>
Security	<ul style="list-style-type: none"> <li>Authentication support</li> <li>PII, PHI, HIPPA compliance</li> </ul>
Software / Hardware	<ul style="list-style-type: none"> <li>APIs to connect key cross-agency resources / data feeds</li> <li>Hosting hardware to support 140K initial users</li> <li>Associated personnel IT equipment</li> </ul>
Pilot Locations	<ul style="list-style-type: none"> <li>2 from each branch of service</li> </ul>
Timeline	<ul style="list-style-type: none"> <li>12 – 36 months</li> </ul>
Funding	<ul style="list-style-type: none"> <li>Shared / cross-agency</li> </ul>
Primary Platform Owners	<ul style="list-style-type: none"> <li>Military OneSource</li> <li>VA.gov</li> </ul>

## INSIGHTS SUMMARY

### User Experience (UX)

- 1 When considering tools, resources and benefits, customers often employ a mental model that focuses on accomplishing individual goals – desiring options that best-map to what they hope to achieve in the time they have to achieve it.
- 2 Customers generally prefer to start thinking about goals relating to future plans as early as their first duty station.
- 3 Customers want to be exposed to recommendations for benefits and services they may be eligible for at the time they begin to meet eligibility criteria.
- 4 Customers desire a single source of truth – one place to find factual and relevant tools and information that include “how to” steps to accomplish key tasks; as well as direct connections with outside / partner / affiliate services or platforms when necessary.
- 5 As a digital solution, customers desire ease of setup, use and navigation; as well as a resource that promotes discovery of what is available to them.
- 6 A digital solution should also:
  - Motivate thinking beyond the present
  - Be as useful and “feel as good” as a tech-industry product
  - Be “sticky” and promote repeated use
  - Fit into existing routines and reward accomplishments / success
  - Receive command support

### Voice of the Customer

**With the technology age and everything online - having an app at your fingertips is more helpful than running around on bases and looking for these people.**

**This [app] gives you enough time to start planning.**

**There seems to be a gap - you get so much info at the beginning of your career and end of career, but nothing while you're in. This could really bridge that gap!**

**There's a lot of individuals going into the military who don't have the life skills... An app like this can help you with that.**

## FACT SHEET / FAQ

### Q: Will another app, website or digital product extension really help solve the problem of navigating the transition process?

**A: Yes.** The key issues customers face when navigating military transition are understanding what action steps are most important and when they should be taking them. This may be solved by minimizing the number of places a customer must identify-and-visit to find reliable information - establishing early and often connections with the providers of benefits and services that may be most applicable to their needs, and activating personalized / timed triggers to prompt customers to take specific actions. An integrated digital solution would theoretically be able to accomplish all of these goals.

However, it is important to note that optimizing the success of a digital solution would also require that it be well maintained / kept up-to-date, easy to use, reliable; and advertised as a critical tool to be promoted and endorsed by unit commanders, leaders and transition support services.

### Q: How would this digital solution improve customers' ability to navigate transition?

**A:** By providing **a framework to surface critical and non-critical tasks / objectives** and their associated "how-to" steps for customers -- timed and triggered to promote earlier action.

### Q: Is this intent to replace TAP counselors and requirements?

**A: No.** This solution is intended to address gaps in identifying and accessing existing (and new / modified) resources at times that are most advantageous to customer success.

### Q: How many customers were part of the testing that led to this recommendation?

**A: 1200+** were part of the initial qualitative research (200) and quantitative validation (1000+) of opportunity areas that were foundational to exploring solutions; and **62** customers participated in the co-design of the recommended digital solution.

### Q: Who were the customers we spoke to?

**A:** Our team recruited **representative samples** that consisted of members of all military branches (with the exception of Space Force); and targeted diversity in age, rank, ethnicity, gender, family type and geographic location (state-level as well as CONUS vs. OCONUS).

### Q: Who are the intended users of this digital solution?

**A: Service members (and their families)** arriving at first duty station and those currently ~2-3 years from separation.

### Q: Will this solution modify or change things we have recently implemented and are still testing?

**A: No.** This solution was designed to be supplemental and supportive of recent improvements already underway.

## FACT SHEET / FAQ

### Q: How will we measure success?

**A:** There are many Key Performance Indicators (KPIs) that may be appropriate to align this pilot with work already underway, and to determine its impact:

1. **Increase:** The number of Service members who were prepared / attained their post-transition intentions (eg. plans / goals) over DoD EISA baselines
2. **Increase:** The number of mitigated risks in Transition Assistance Programs over DoD EISA baselines
3. **Increase:** The number of preventative resources / referrals provided and WHO's identified over DoD EISA baselines
4. **Increase:** The number of VA benefits and healthcare enrollments prior to date of discharge over VA baselines
5. **Increase:** VA Trust Score among Veterans under 40 over V-Signals baselines
6. **Decrease:** Veteran unemployment rates under DoD / DoL baselines
7. **Decrease:** Veteran suicide rates under VA baselines
8. **Decrease:** Veteran homelessness rates under VA / HUD baselines

### Q: How will we ensure people will actually use this solution?

**A:** More exploration into this question will be incorporated into future design sprints. However, early assumptions include: **incorporation in leadership training schools and programs as well as at key touchpoints throughout the military lifecycle journey**, such as: recruiting, arrival at first duty station, change of duty station, pre-deployment, post-deployment, and retirement planning.

### Q: Are there any 'Quick Wins' from this work?

**A: Yes.** As part of the initial content development for piloting (next phase of work following approval), the team plans to produce a series of PDF checklists tied to the main goals identified. These checklists can be shared as resources for early testing at low-to-no cost ahead of the digital solution being available.

### Q: Are there any 'Big Wins' outside of improving the customer experience and outcomes?

**A: Yes.** By working to integrate more cross-agency information for the customer, there are implications to increased data-sharing and collaboration.

### Q: Will states / localities / installations and other partners be included in this?

**A:** That is a **long-term** goal, but may not be feasible to include in the Minimum Viable Product (MVP).

### Q: Who else can see how service members are progressing?

**A:** Service members have indicated that information-sharing should be handled with care to avoid stigmatizing use of the solution. That said, it is recommended that **critical requirements** / milestones within customer task lists be visible to **Transition Service Managers and commanders** to help identify and provide support to customers who may be stuck or who have not started important process steps.



## SPRINT RECAP

Over the course of 13-weeks, the PMA project team achieved the following milestones in support of creating a solution that helps resolve customer pain points around understanding next steps and identifying what is most important to accomplish during their transition:

### In-Person Co-Design Workshop

- Identified high-impact customer touchpoints within the transition process where opportunity for improvement may exist
- Reviewed industry examples and propose solutions to key **How Might We (HMW)** opportunities
- Prioritized, selected and reimaged solutions
- Prototyped prioritized solutions for testing
- Validated solution direction with customers through 1:1 interviews

### Methodology

- 1:1 Interview:** A method for probing customers' past experiences and identifying significant expectations or concerns for their future service interactions.
- Focus Groups:** A method for capturing and quantifying many diverse perspectives on a product, service or subject.
- Co-Design:** A method for designing new products, systems and services with their stakeholders and end-users.
- Card Sorting:** A method for exploring relationships between content elements and prioritizing structures.
- Prototyping:** A method for communicating, testing and iterating solution ideas.
- Visual Preference Testing:** A method for gathering customer feedback to set the visual direction for a product or service.
- Usability Testing:** A method for testing prototypes with customers to understand what works and what needs to be improved.
- System Usability Scale (SUS):** A method for quantifying ease of use and interest-levels following tests as a means of continuing validation of approach.

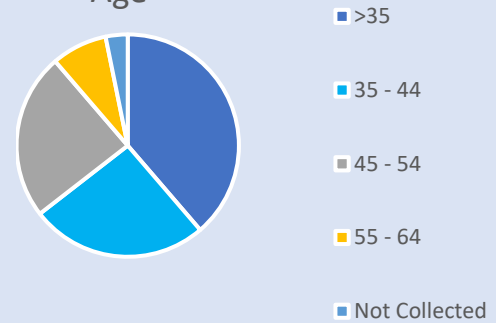
## Participant Demographics

*n* = 62

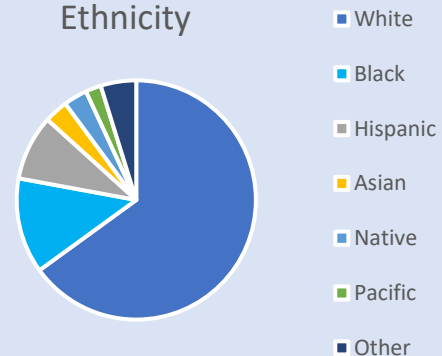
### Gender



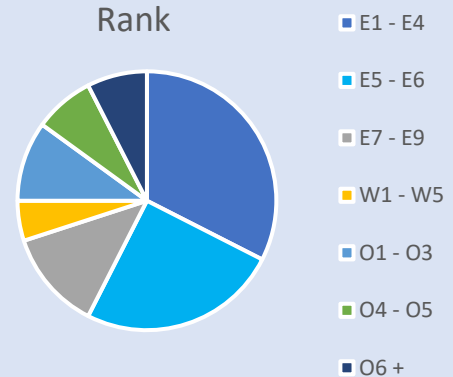
### Age



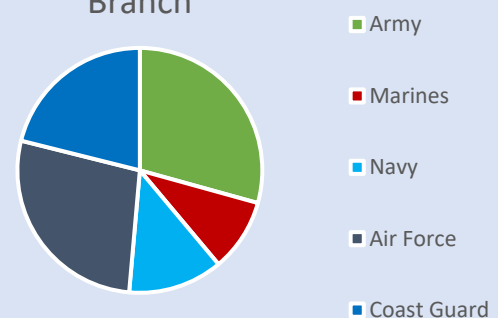
### Ethnicity



### Rank



### Branch



## SPRINT RECAP (CONTINUED)

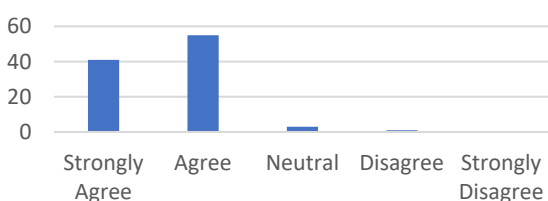
### Testing & Iterations

	Testing Week	Research Questions	Key Learnings
Content and use cases	Week 5	<ul style="list-style-type: none"> <li>What common goals do Service members set within each life domain that was previously-validated in research?</li> </ul>	<ul style="list-style-type: none"> <li>Top-level goals Service members may commonly set</li> <li>Validation of a desire to set most goals at the start of military career</li> </ul>
	Week 6	<ul style="list-style-type: none"> <li>What subordinate context should help flesh-out those goals?</li> <li>How might key resources, information and transition process steps relate to goals, context and domains?</li> <li>What communications rhythms and modalities do customers hope to receive?</li> </ul>	<ul style="list-style-type: none"> <li>Primary subordinate goals and where / how they align with top-level goals.</li> <li>Better understanding of when resources / information are most desired vs. when tools / transactions are most desired</li> <li>Key communications preferences</li> </ul>
Features, visuals, flow and usability	Week 7	<ul style="list-style-type: none"> <li>What visual and usability preferences should we adopt in a digital solution?</li> </ul>	<ul style="list-style-type: none"> <li>Prioritization of features and functions</li> <li>Aesthetic, layout and navigation preferences</li> <li>Key sticking points when using the application</li> </ul>
	Week 8	<ul style="list-style-type: none"> <li>What visual and usability preferences should we adopt in a digital solution?</li> <li>What design recommendations are most important?</li> </ul>	<ul style="list-style-type: none"> <li>Prioritization of features and functions</li> <li>Aesthetic, layout and navigation preferences</li> <li>Customer “Must haves” and key design considerations</li> </ul>
Design Validation	Week 10	<ul style="list-style-type: none"> <li>What do active Service member focus groups think about the recommended / co-designed direction or way-ahead?</li> </ul>	<ul style="list-style-type: none"> <li>Confirmation of value proposition</li> <li>Consensus on design considerations so far</li> </ul>

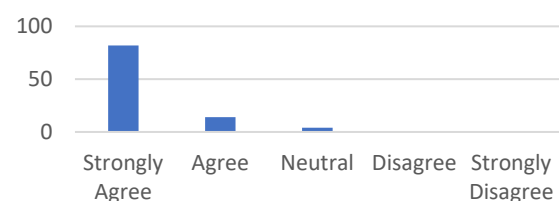
### System Usability Scale (SUS) Results

An average of 96.2% of participants agreed or strongly agreed that the concept would be useful / helpful, easy to use, well-integrated and elicit their confidence.

#### I think I would like to use this system frequently



#### I thought the system would be easy to use

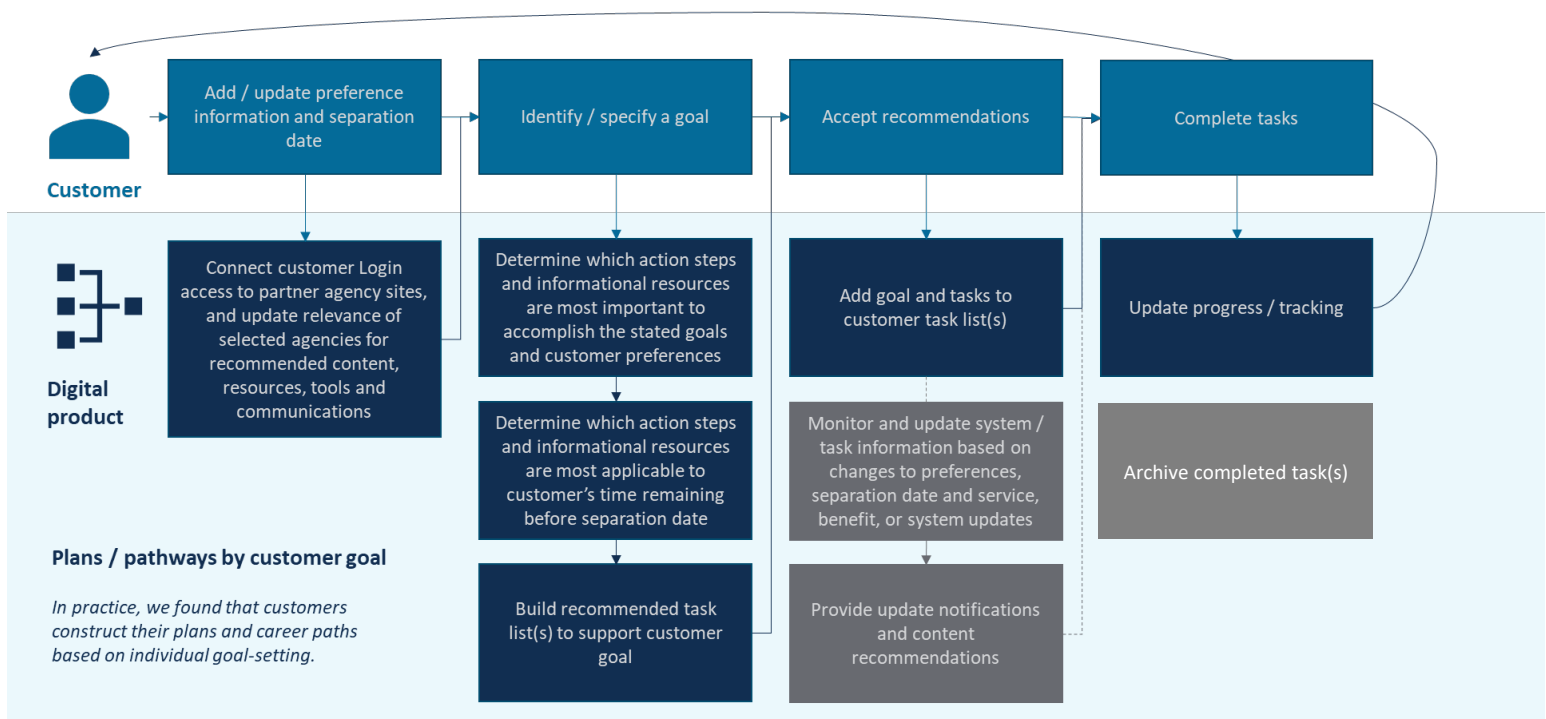




A blue-tinted photograph of a smartphone and a laptop keyboard on a wooden surface. The smartphone is in the foreground, and the laptop keyboard is visible in the background. The word "PROTOTYPE" is overlaid in large white letters.

**PROTOTYPE**

## PROTOTYPE OVERVIEW

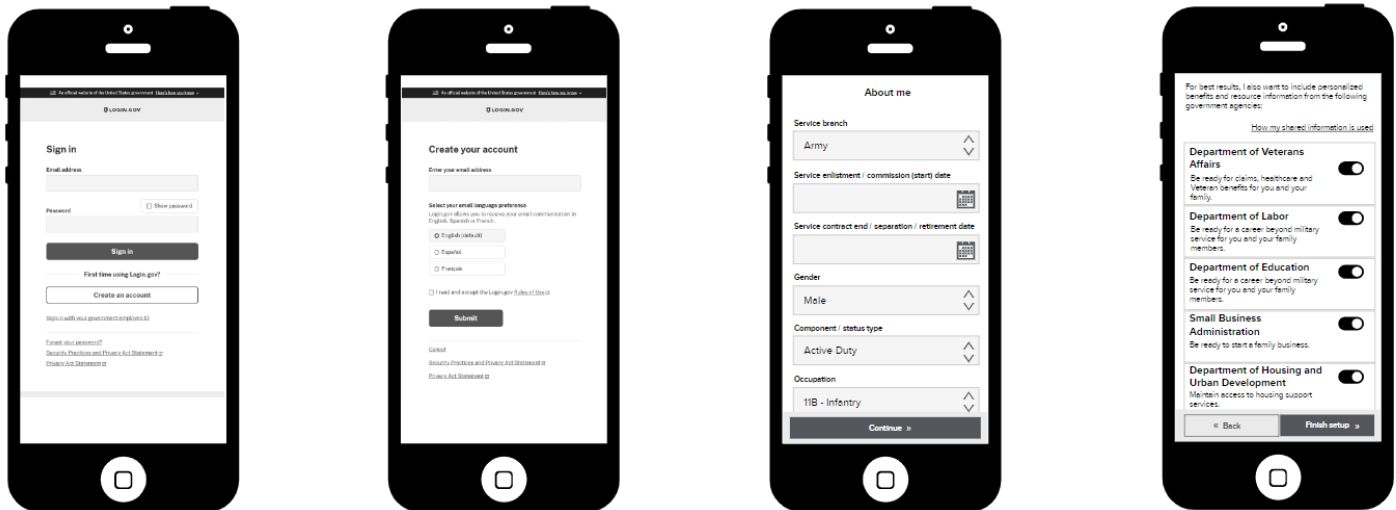


### Curating a Sea of Information and Resources

In summary, the PMA team found that customers generally construct their Individual Development Plans (IDPs) and career paths as a series of distinct goals.

As such, the proposed digital solution aims to simplify the goal-setting and task-recommendations process based on customer preferences and stated desires so that curated tools, resources and timelines are easily accessed based on where the customer is and what they hope to achieve.

## SETUP WORKFLOW



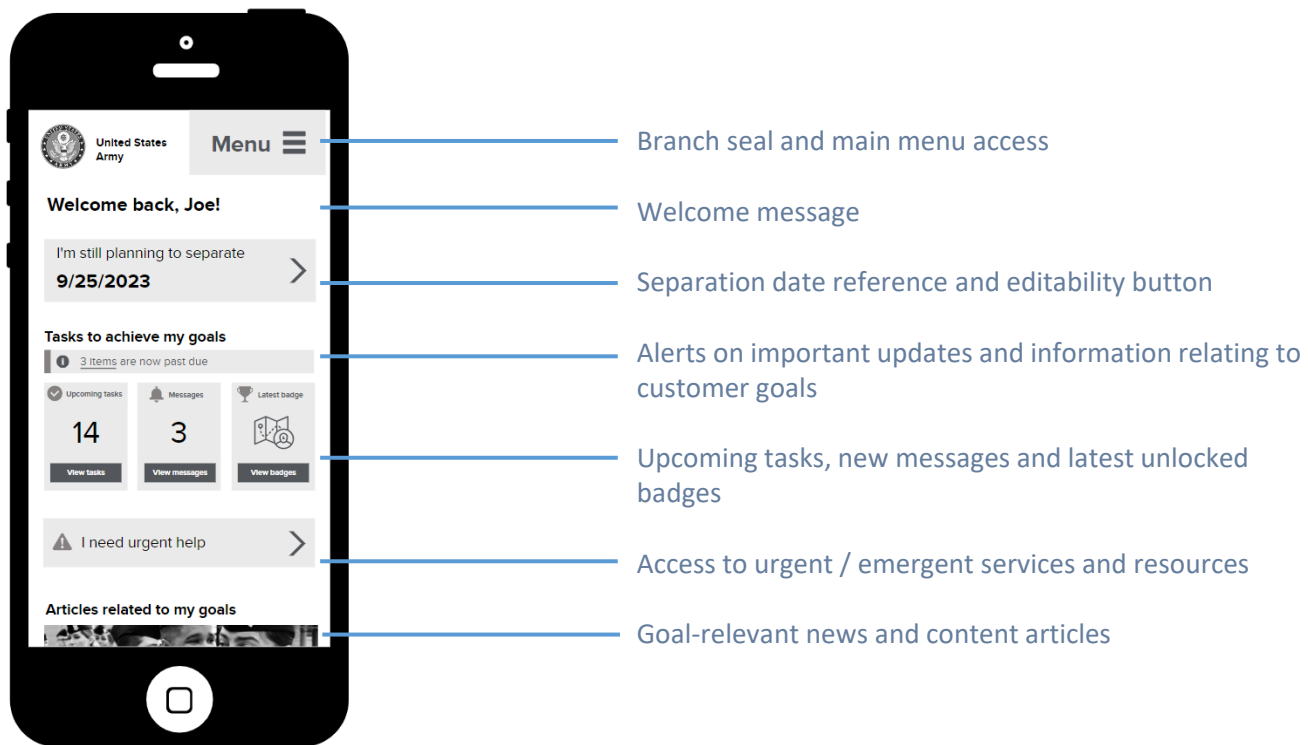
### Quick, clean and user-friendly

*Customers felt an account creation, user information and agency opt-in / connection setup cycle would be quick and easy.*

### Key Concepts

- Users setup an account that includes information about their separation / tour, branch of service, occupation and preferential demographics that can be matched to personalized tasks/resources.
- Users indicate which partner agencies they would like to share their information and/or establish a login account with; which unlocks partner resources and access to notifications.

## HOME SCREEN



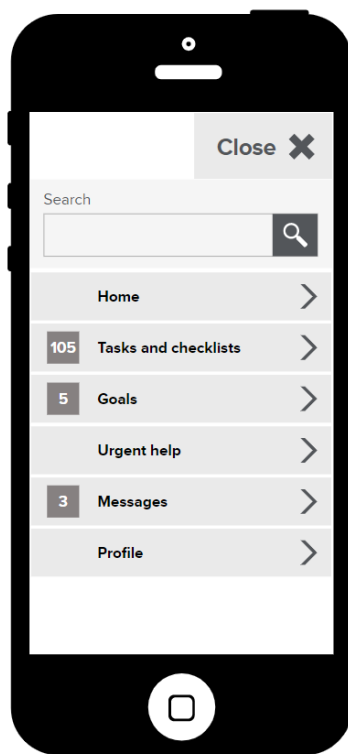
### The most important things up-front

*Customers liked clean and clear “sections” of content that put the most important features at their fingertips.*

#### Key Concepts

- Users can monitor and update their separation date at all times to keep that master deadline in-focus.
- Users can quickly access task lists, notifications / alerts and relevant information to the goals they've set and/or the critical tasks that have been added for them automatically.

## MENU / NAVIGATION



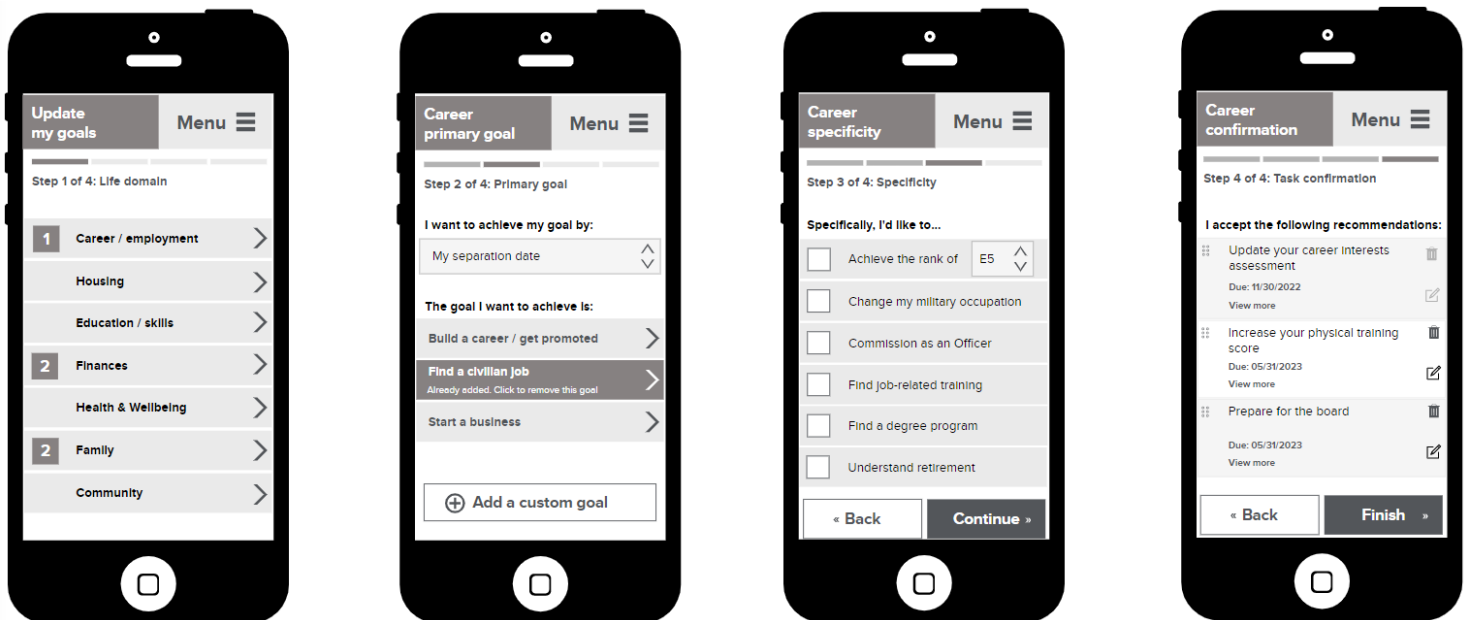
### Ease of navigation

*Customers enjoyed a pop-out / hamburger menu that allowed for each of the main features to be separated and easily accessible.*

#### Key Concepts

- Users can quickly find all of the main features of the digital solution

## GOAL-SETTING WORKFLOW



### Single-piece goal flow

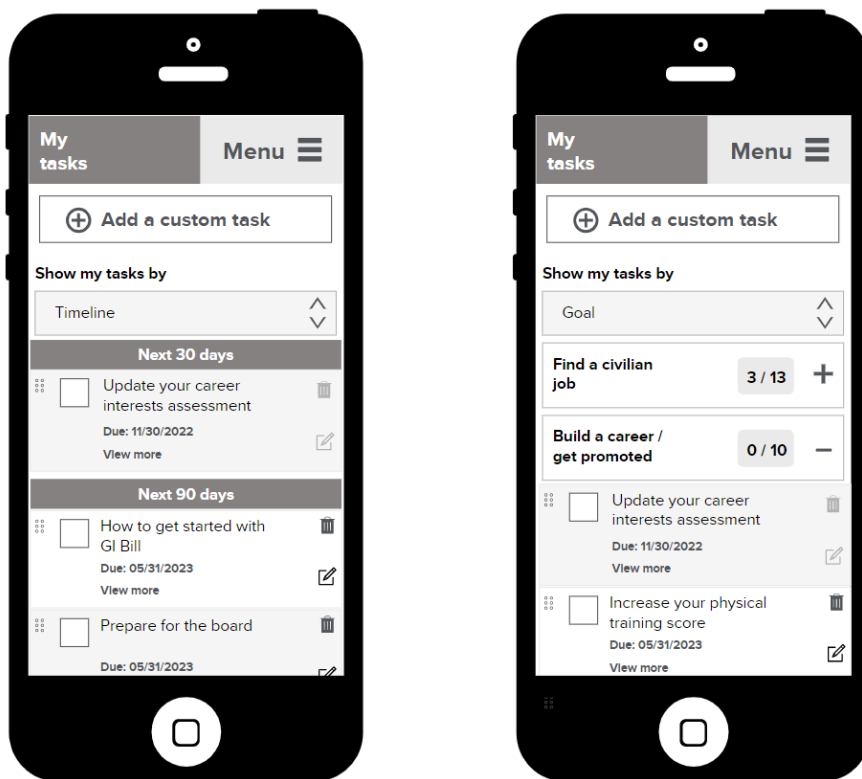
*Customers generally applied a mental model of setting a single goal at a time -- which included confirming app-recommended tasks prior to adding them to their master task list or timeline.*

#### Key Concepts

- Users choose which life domain they're hoping to influence
- Users determine "by when" they want to achieve their goal, then select from a list of recommended primary goals (or create their own custom goal)
- Users select from related secondary goals (if a primary was selected) to further define what they're hoping to achieve
- Users then review a list of recommended critical and non-critical timed tasks based on their "achieve by" date. Critical tasks are also influenced by the user's separation date to ensure all requirements are met prior to separation.
- Users can modify or remove non-critical tasks to determine when and what is most relevant to them, then publish their final accepted tasks to their own tasks lists



## TASK MANAGEMENT



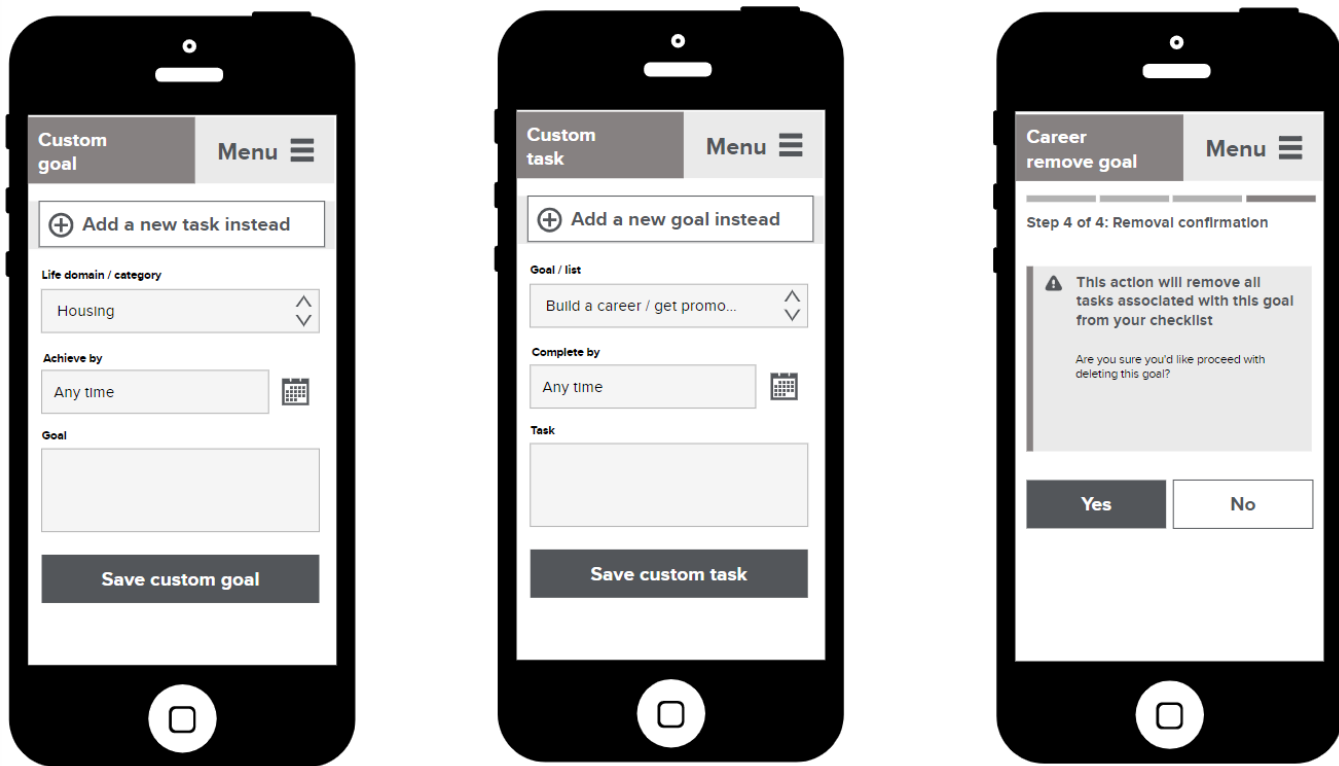
### Organized task lists

*Customers appreciated the ability to filter and sort their recommended and custom-created tasks by timeline and within the goals they've set. Additionally, they want to be able to quickly access the tasks they've already completed.*

#### Key Concepts

- Users can “view more” about any task to reveal information, how-to steps, direct access / transaction options and redirect links
- Users can check the box to move items to their “Completed” list
- Users can sort / filter their task lists by timeline, goal, required / critical and completed
- Users can reorder, edit or remove non-critical tasks from their list at any time
- Users can create custom tasks to add to their list at any time

## CUSTOMIZATION



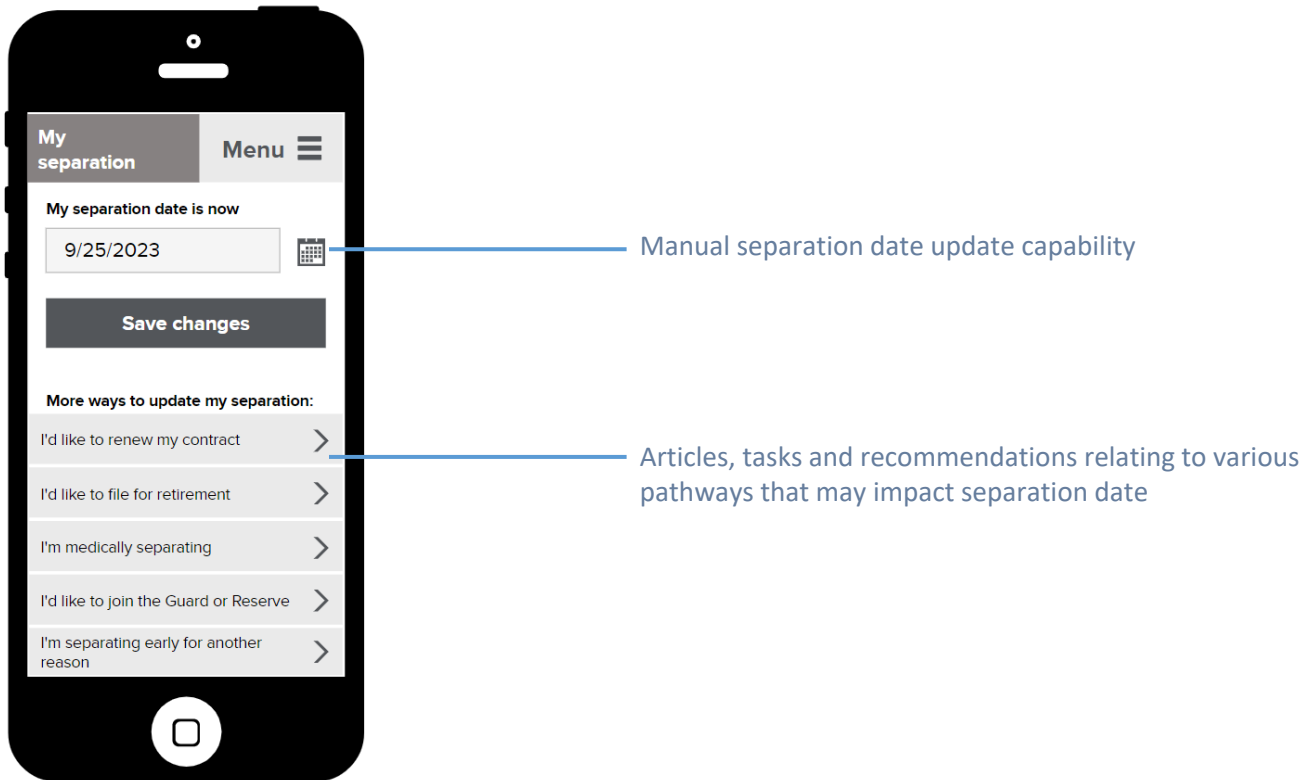
### Freedom and customization

*When goals and tasks that are not supported by templates within the system, customers want to be able to create their own – and remove batches of tasks when goals are no longer applicable.*

#### Key Concepts

- Users can create custom tasks to add to their list at any time
- Users can create custom goals to nest / align their custom tasks to at any time
- Users can remove or edit their selections on entire goals (and associated recommended tasks) at any time – updating their entire associated task list through a single action

## SEPARATION DATE MODIFICATIONS



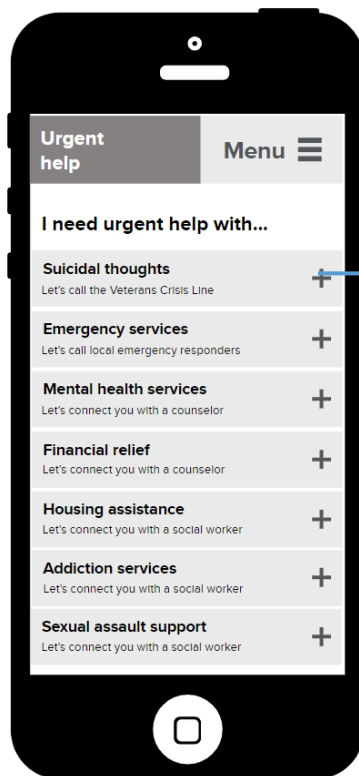
### Simple updates to separation date

*Customers desired a way to easily update their separation date (and all relevant goal timelines in the process); as well as find helpful information on how to proceed with various pathways that could impact when they exit service.*

#### Key Concepts

- Users can manually modify their separation date at any time; which then automatically updates critical task due dates when applicable
- Users can review separation pathway information and add separation-modifying goals / tasks to their task lists by selection the reason for updating their separation date

## URGENT HELP RESOURCES



Expandable / quick information and resources for various urgent circumstances / situations Service members may find themselves in (including direct links to call 24/7 hotlines and help centers or chat with agents online)

### The right help when it's needed

*Customers relayed several key sticking points where urgent help and resources may be necessary to avoid crisis while serving in the military and beyond.*

#### Key Concepts

- Users can select from various crisis situations to quickly expose accurate contact and help information
  - Note: customers expressed a desire for these options to be localized when applicable and possible

## MESSAGING AND NOTIFICATIONS



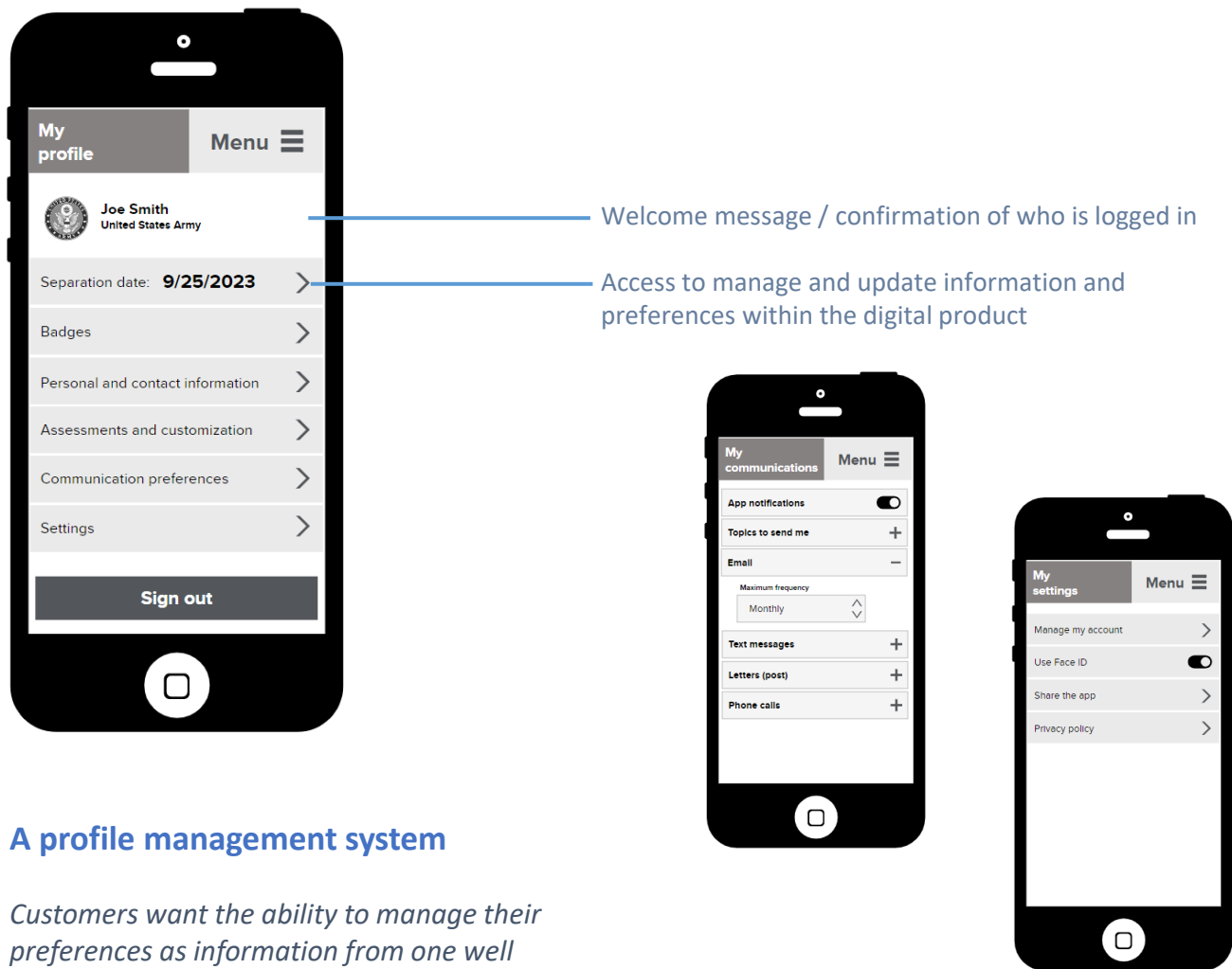
### A message / notifications center

*Customers want the ability to manage incoming system notifications or messages that may come in from partners, counselors, etc.*

#### Key Concepts

- Users can create custom tasks to add to their list at any time
- Users can create custom goals to nest / align their custom tasks to at any time
- Users can remove or edit their selections on entire goals (and associated recommended tasks) at any time – updating their entire associated task list through a single action

## PROFILE MANAGEMENT



### A profile management system

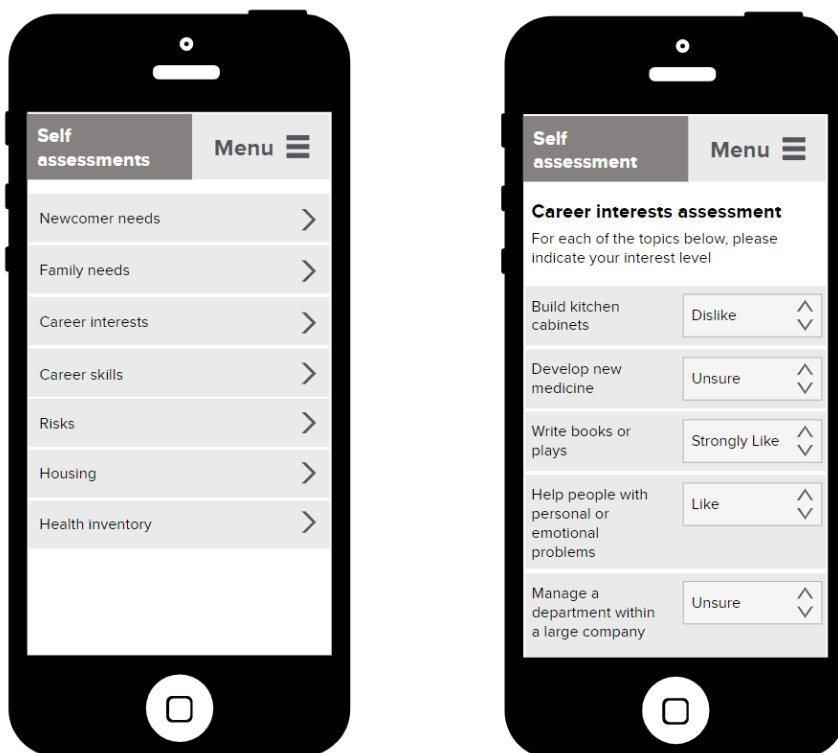
*Customers want the ability to manage their preferences as information from one well organized set of lists and screens.*

#### Key Concepts

- Users can update their biographical / preferential data at any time
- Users can add additional detail / fidelity to their recommendation results and system behaviors by submitting / updating self-assessments and other preferences



## SELF ASSESSMENTS



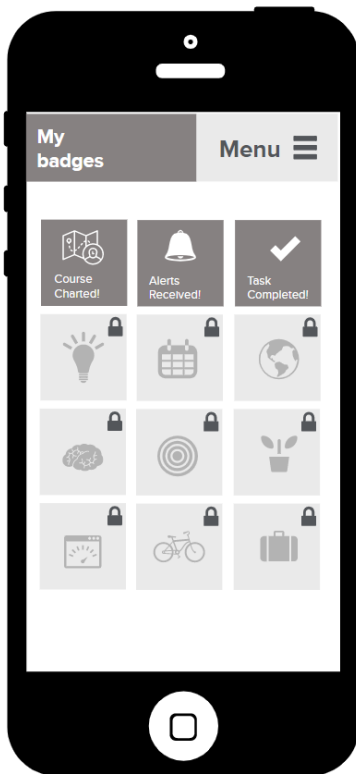
### Self assessments

*Customers agreed that taking routine self-assessments to help identify relevant preferences, gaps and risk factors could help ensure they're getting the most desirable and necessary communications and recommendations.*

#### Key Concepts

- Users can add additional detail / fidelity to their recommendation results and system behaviors by submitting / updating self-assessment information

## MOTIVATION



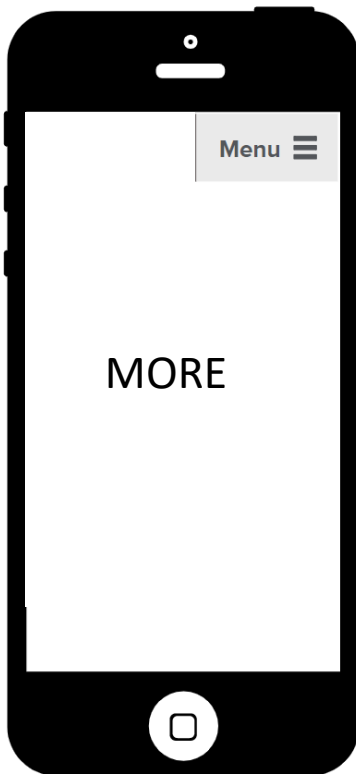
### Motivational badges

*Most customers expressed additional motivation in using the application when they knew there were things to “unlock” based on their activity, and wanted to be able to see what it takes to unlock them.*

#### Key Concepts

- Users can review badges they’ve unlocked and those they have not – including details about what actions or progress are needed for badges to be earned

## ADDITIONAL CONSIDERATIONS



### Key Concepts

- Users want to have access to social features such as message boards where they may post questions or interact with peers who are navigating the same goals / processes they are.
- Users would prefer to have access to installation-level / local POCs when appropriate to best-solve their support or urgent help needs.
- Users expressed an interest in customizing the coloration of their app to match their military service and to switch between light / dark mode.
- Users expressed a desire to include terminal leave plans as a means of moving up timelines related to their separation date.
- Users expressed an interest in direct resource search to attempt to find relevant information about benefits, tools and resources by name.



# SUPPORTING DATA

## PRIMARY & SECONDARY CUSTOMER GOALS

Career / Employment	Housing	Education / Skills	Financial
<ul style="list-style-type: none"> <li>Build a career / Get promoted               <ul style="list-style-type: none"> <li>Change military occupation</li> <li>Setting priorities</li> <li>Commissioning to Officer or Warrant Officer</li> </ul> </li> <li>Find a civilian job               <ul style="list-style-type: none"> <li>Build a resume</li> <li>Networking</li> <li>Match military standard of living</li> <li>Set a career path                   <ul style="list-style-type: none"> <li>Find a new purpose / explore options</li> <li>Match military experience to potential career fields</li> </ul> </li> </ul> </li> <li>Start a business</li> </ul>	<ul style="list-style-type: none"> <li>Find a home / place to live               <ul style="list-style-type: none"> <li>Owning a home                   <ul style="list-style-type: none"> <li>Get a home loan</li> </ul> </li> <li>Renting</li> <li>Find a safe community in an area of my choice</li> <li>Housing market vs. BAH</li> <li>Laying down roots</li> </ul> </li> <li>Move to a new state / town               <ul style="list-style-type: none"> <li>School zones</li> <li>Crime rates</li> <li>Housing affordability</li> </ul> </li> <li>Sell a home               <ul style="list-style-type: none"> <li>Remodeling / maximizing home value</li> <li>Coordinating inspections, walkthroughs, etc.</li> <li>Understanding home as an investment</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Job-related training / on-the-job training/ professional schools               <ul style="list-style-type: none"> <li>Military pathways</li> </ul> </li> <li>Earning a degree or certification               <ul style="list-style-type: none"> <li>Find a program</li> <li>Find a college</li> </ul> </li> <li>Preparation for a career path               <ul style="list-style-type: none"> <li>Understanding retirement</li> </ul> </li> <li>Learning about benefits               <ul style="list-style-type: none"> <li>VA information</li> <li>Health information</li> <li>Employment information</li> <li>How to get help</li> </ul> </li> <li>Skills development               <ul style="list-style-type: none"> <li>Leadership</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Creating a budget               <ul style="list-style-type: none"> <li>Paying for school</li> <li>Managing obligations</li> <li>Managing home maintenance</li> <li>Managing major purchases</li> <li>Financial assistance programs</li> </ul> </li> <li>Debt management               <ul style="list-style-type: none"> <li>Reducing obligations and expenses</li> </ul> </li> <li>Saving money / investing for the future               <ul style="list-style-type: none"> <li>Retirement planning</li> </ul> </li> <li>Affording travel / vacations</li> <li>Understanding costs of living outside of the military               <ul style="list-style-type: none"> <li>Insurance costs</li> <li>State/local taxes, property costs, income-levels</li> <li>Food, fuel, incidentals</li> </ul> </li> </ul>
Health & Wellbeing	Family	Community	Urgent Sticking Points
<ul style="list-style-type: none"> <li>Stay in shape               <ul style="list-style-type: none"> <li>Eat healthier</li> <li>Lose Weight</li> <li>Find a gym</li> <li>Find outdoor activities</li> <li>Manage stress</li> <li>Sleep better</li> </ul> </li> <li>Get mental healthcare               <ul style="list-style-type: none"> <li>Life coaching</li> </ul> </li> <li>Get healthcare               <ul style="list-style-type: none"> <li>Manage pain</li> <li>Personal maintenance / annual checkups</li> <li>Understanding health insurance</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Manage relationships               <ul style="list-style-type: none"> <li>Time management / protected time for loved ones</li> <li>Couples counseling</li> </ul> </li> <li>Get married</li> <li>Have or adopt a child</li> <li>Supporting family careers &amp; healthcare</li> <li>Enroll children in school</li> <li>Get a pet</li> </ul>	<ul style="list-style-type: none"> <li>Find volunteer opportunities</li> <li>Find social groups that match my interests</li> <li>Find local religious organizations</li> <li>Find donation opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Financial relief               <ul style="list-style-type: none"> <li>Job placement services</li> </ul> </li> <li>Suicidality</li> <li>Emergency services               <ul style="list-style-type: none"> <li>How to Access Urgent Care</li> </ul> </li> <li>Housing assistance</li> <li>Mental health services</li> <li>Addiction services</li> <li>Sexual Assault Support</li> </ul>

## RESOURCE-TYPE PREFERENCES

Information-Leaning	Information + Tools	Tools & Transaction-Leaning
<b>Housing</b> <ul style="list-style-type: none"> <li>Sell a home</li> </ul> <b>Education / skills</b> <ul style="list-style-type: none"> <li>Get job-related training</li> <li>Earn a degree or certification</li> </ul> <b>Financial</b> <ul style="list-style-type: none"> <li>Understand costs of living</li> </ul> <b>Family</b> <ul style="list-style-type: none"> <li>Support family member careers / healthcare</li> <li>Manage relationships</li> </ul> <b>Community</b> <ul style="list-style-type: none"> <li>Find social groups that match my interests</li> </ul>	<b>Career / employment</b> <ul style="list-style-type: none"> <li>Start a business</li> </ul> <b>Housing</b> <ul style="list-style-type: none"> <li>Find a home / place to live</li> <li>Move to a new state / town</li> </ul> <b>Financial</b> <ul style="list-style-type: none"> <li>Afford vacation / travel</li> </ul> <b>Health &amp; wellbeing</b> <ul style="list-style-type: none"> <li>Stay in shape</li> <li>Get mental healthcare</li> <li>Get healthcare</li> </ul> <b>Family</b> <ul style="list-style-type: none"> <li>Get married</li> <li>Have or adopt a child</li> <li>Enroll a child in school</li> <li>Get a pet</li> </ul> <b>Community</b> <ul style="list-style-type: none"> <li>Find volunteer opportunities</li> <li>Find local religious organizations</li> <li>Find donation opportunities</li> </ul> <b>General</b> <ul style="list-style-type: none"> <li>Find my benefits</li> </ul>	<b>Career / employment</b> <ul style="list-style-type: none"> <li>Build a career / get promoted</li> <li>Find a civilian job</li> </ul> <b>Education / skills</b> <ul style="list-style-type: none"> <li>Prepare for a career path</li> <li>Develop new skills</li> </ul> <b>Financial</b> <ul style="list-style-type: none"> <li>Create a budget</li> <li>Manage debt</li> <li>Save money / invest for the future</li> </ul>



COMMUNICATION PREFERENCES

Communication Modes

Top-tier	Mid-tier	Low-tier
<ul style="list-style-type: none"><li>Email</li><li>Word of mouth</li><li>Text message</li></ul>	<ul style="list-style-type: none"><li>Mail (letter / post)</li><li>Push notifications (app-based)</li><li>Phone call</li><li>Social media</li></ul>	<ul style="list-style-type: none"><li>Advertisements</li></ul>

Communication Content Preferences

Top-tier	Mid-tier	Low-tier	Low-to-no priority
<ul style="list-style-type: none"><li>My goals</li><li>My separation date (time-boxed events and resources)</li><li>What I’m eligible for</li><li>My risk factors</li></ul>	<ul style="list-style-type: none"><li>My interests</li><li>My separation type (retirement, voluntary, involuntary)</li><li>What my branch offers</li><li>What my community offers</li></ul>	<ul style="list-style-type: none"><li>My status type (active, guard, reserve, spouse, dependent, caregiver, survivor)</li><li>My family type (# dependents, etc.)</li></ul>	<ul style="list-style-type: none"><li>My gender</li><li>My rank</li></ul>

## SME DATA CONNECTION RECOMMENDATIONS

“Must Have” Recommendations	“Nice to Have” Recommendations
<ul style="list-style-type: none"> <li>• Authentication / Login (possibly with connection to DSLogin or ID.me)</li> <li>• TAP XXI – DTARS – TAP coordination</li> <li>• DMDC – Separation and Active Service Date</li> <li>• IPSSA</li> <li>• APIs and/or deep links for each of the platforms compared on page 28.             <ul style="list-style-type: none"> <li>• VA: Eligibility mapping, application(s), benefits and services information</li> <li>• VA Caregiver website.</li> <li>• VA Home loan.</li> <li>• VA VR&amp;E platform.</li> <li>• VA GI Bill platform.</li> <li>• VA Comp &amp; Pen.</li> <li>• VA Health care</li> <li>• DOL AJC website.</li> <li>• FAFSA.</li> <li>• Small Business Association.</li> <li>• Military health record platforms (MHS Genesis).</li> <li>• Service Component Wounded Warrior System of Record (i.e. Army Recovery Care System (ARCS)).</li> </ul> </li> <li>• <a href="https://milgears.osd.mil/">https://milgears.osd.mil/</a> - for information about all career matters.</li> <li>• <a href="https://skillbridge.osd.mil/">https://skillbridge.osd.mil/</a> - so that the user can be made aware of this resource early enough to be able to participate in support of their transition.</li> <li>• Service Component Education platforms.</li> <li>• Service Component Family and Wellness program platforms.</li> <li>• Tricare Information.</li> <li>• Yellow Ribbon</li> </ul>	<ul style="list-style-type: none"> <li>• Milconnect - this is a hub to connect the user to different types of resources.</li> <li>• Service specific TAP websites.</li> <li>• MSO/VSO links.</li> <li>• DoD Educational data systems</li> <li>• State and Territory VA websites.</li> <li>• USA Jobs</li> <li>• TENS for ENPP</li> </ul>

## PRIMARY PLATFORM(S) SELECTION CRITERIA

Criteria	Military OneSource	VA.gov / VA mobile app	Career OneStop	FedsHire Vets
Strong recommendation by PMA teams / experts	✓	✓		
Strong Audience Match * Currently serving active service members, transitioning service members and their families as <b>primary audiences</b>	✓			✓
Strong Content Match * Currently providing tools and resources relating to a <b>broad array</b> of topics / life domains <b>specific to military transition</b>	✓	✓		
Strong Functional Match * Currently providing <b>goal-setting and/or task-list generation</b> tools, features or transactions	✓			
Strong Integration Match * Currently connected to IT / data systems used to <b>track progress and/or provide direct human-intervention</b> support to transitioning service members.	✓	✓		
Usability * Provides a clean, easy-to-use experience.	✓	✓		
<b>Best Matches</b>	✓	✓		

\*Each platform above was evaluated through exploration and review of currently-published versions on web and / or mobile as well as direct input from subject matter experts, then rated on a 5-point Likert scale against the stated criteria to determine strongest matches (No Relevance, Almost No Relevance, Neutral, Some Relevance, Strong Relevance). Platforms scoring a 5 received a binary “Yes” / checkmark as a strong match, and the platform with the most checkmarks was selected as a best match.

## PRIMARY PLATFORM(S) SELECTION CRITERIA (SCORING)

Criteria	Military OneSource	VA.gov / VA mobile app	Career OneStop	FedsHire Vets
Strong recommendation by PMA teams / experts	5 – Strong  <b>Why?</b> Many SMEs referred to this platform - pointing to integration with existing transition systems and processes.	5 – Strong  <b>Why?</b> Many SMEs referred to this platform - pointing to integration with future benefits.	3 – Neutral  <b>Why?</b> One SME referred to this platform - pointing to its relevance to the Career life domain.	1 - No Relevance  <b>Why?</b> SMEs did not refer to this platform as a potential solution.
Strong Audience Match * Currently serving active service members, transitioning service members and their families as <b>primary audiences</b>	5 – Strong  <b>Why?</b> Transitioning service members are a primary audience of the platform.	4 – Some  <b>Why?</b> Transitioning service members are a secondary audience of the platform.	4 – Some  <b>Why?</b> Transitioning service members are a secondary audience of the platform.	5 – Strong  <b>Why?</b> Transitioning service members are a primary audience of the platform.
Strong Content Match * Currently providing tools and resources relating to a <b>broad array</b> of topics / life domains <b>specific to military transition</b>	5 – Strong  <b>Why?</b> The platform arranges content and tools around major life domains, and includes specific pathways relating to transition.	5 – Strong  <b>Why?</b> The platform arranges content and tools around major benefits / services and includes some pathways relating to transition.	3 – Neutral  <b>Why?</b> The platform provides content specific only to “Career” life domain.	3 – Neutral  <b>Why?</b> The platform provides content specific only to “Career” life domain.

## PRIMARY PLATFORM(S) SELECTION CRITERIA (SCORING CONTINUED)

Criteria	Military OneSource	VA.gov / VA mobile app	Career OneStop	FedsHire Vets
<b>Strong Functional Match</b> * Currently providing <b>goal-setting and/or task-list generation</b> tools, features or transactions	5 – Strong  <b>Why?</b> The platform provides some tools that aid with planning and task-list generation, including various calculators and the “Plan My Move” tool.	3 – Neutral  <b>Why?</b> The platform offers tools and information that may be used to manually develop goals and task lists, but does not generate task lists based on customer goals.	3 – Neutral  <b>Why?</b> The platform offers tools and information that may be used to manually develop goals and task lists, but does not generate task lists based on customer goals.	3 – Neutral  <b>Why?</b> The platform offers information that may be used to manually develop goals and task lists, but does not generate task lists based on customer goals.
<b>Strong Integration Match</b> * Currently connected to IT / data systems used to <b>track progress and/or provide direct human-intervention</b> support to transitioning service members.	5 – Strong  <b>Why?</b> The platform is currently integrated with WHO referrals and transition communications systems.	5 – Strong  <b>Why?</b> The platform is currently integrated with claims tracking and processing as well as benefits enrollment.	3 – Neutral  <b>Why?</b> The platform is well-integrated with career data systems, but does not directly connect with transition data.	3 – Neutral  <b>Why?</b> The platform is well-integrated with career data systems, but does not directly connect with transition data.
<b>Usability</b> * Provides a clean, easy-to-use experience.	5 – Strong  <b>Why?</b> Information architecture, searchability and navigation support discovery of desired tools, resources and content.	5 – Strong  <b>Why?</b> Information architecture, searchability and navigation support discovery of desired tools, resources and content.	4 – Some  <b>Why?</b> Information and tools are provided, but page layouts may be “busy” or challenging to follow for customers.	4 – Some  <b>Why?</b> Information architecture, searchability and navigation support discovery of information, but primarily in the form of static web pages.



# APPENDIX



## PAST RESEARCH FINDINGS

### Military Transition | Discovery

- As they prepare to separate, transitioning Service members (TSMs) navigate a lack of direction and coordination for the first time since they joined the military. (Military Transition, 2022)
- Veterans quickly lose confidence when engaging with civilian services that fail to meet their standards of reliability. (Military Transition, 2022)
- Veterans often casually approach reintegration into civilian lifestyle and may not appropriately prepare for the impact of having to replace their entire community, purpose, culture and identity. (Military Transition, 2022)
- TSMs find themselves walking off a resource cliff with complex and short timelines, creating a lack of awareness and foresight into how to land safely. (Military Transition, 2022)
- TSMs are overwhelmed with information and aren't sure how to apply it to their needs, so they rely on advice from other TSMs and Veterans based on their experiences. (Military Transition, 2022)
- Even the most prepared and supported TSMs run into unforeseen challenges when relying on the competence of those working behind the scenes. (Military Transition, 2022)
- Spouses and family members may discover their own challenges in establishing a life after the military that seeks to re-engage a postponed career, education opportunity or community that was previously sacrificed in support of frequent moves and the demands of military life. (Military Transition, 2022)

### Past Research | Guidance

- Veterans often make decisions based on 'what they know now'. (TAP Decision Tree Narrative, 2018)
- One-on-one conversations may be most effective in delivering benefits information. (TAP Decision Tree Narrative, 2018)
- A customizable approach would help TAP students navigate the benefits important to them individually. (TAP Decision Tree Narrative, 2018)
- Veterans think of VA as one of many organizations here to support them. (VA Outreach Strategy, 2019)
- Family members and other Veterans are key to encouraging Veterans to engage with VA. (VA Outreach Strategy, 2019)
- Veterans expect to find information about VA benefits and services in one intuitive place that organizes the information in a consumable way. (Brand Strategy Research Report, 2017)
- Veterans are confused by the fragmented and complex VA benefits ecosystem. (Brand Strategy Research Report, 2017)
- Veterans are largely unaware of VA while in service, and view it primarily as a "next step," rather than a continuous entity that is there with them throughout their military lifecycle. (Member Experience, 2021)
- Guidance is among transitioning servicemembers' highest priorities. (Military to Civilian Transition, 2019).

## PAST RESEARCH FINDINGS (CONTINUED)

### Past Research | Employment / Career

- Servicemembers are novices at the labor force. (Employment Journey, 2019)
- A commander or supervisor has an outsized influence on whether the servicemember is granted the time, space and acceptance to pursue their personal career transition. (Employment Journey, 2019)
- Many enlisted servicemembers are novices at managing their own budgets... which has ripple effects across career. (Employment Journey, 2019)
- Career is among transitioning servicemembers' highest priorities. (Military to Civilian Transition, 2019).

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