

NERDERY®



The Evolving Role of Research
in the Digital Product Lifecycle:

A Case Study with a Global
Healthcare Provider

Sameera Kapasi, Dr. Sylvia Kidder, & Dr. Bridget Potocki

March 28, 2023

Today's Speakers



Sameera Kapasi, M.S.

Director of Insights

“

I continue to be humbled by companies who want to be digitally adept, but start with putting their user needs at the forefront of everything they do and endeavor to foster a culture that supports data-driven decisions.



Sylvia Kidder, Ph.D.

Sr. Insights Analyst

“

I am passionate about the art of science. All research should be ethical, methodologically sound, and tell a compelling story. It should also be beautiful.



Bridget Potocki, Ph.D.

Sr. Insights Analyst

“

Empathy and perspective-taking are at the core of my research approach. The right method provides a user-centered approach that improves digital experiences and products.

This session uses a case study with a global healthcare provider to illustrate **best practices for incorporating research into the product lifecycle.**

Purpose

Every successful digital product is grounded in a real consumer need; thus, research is an essential part of digital product teams.

Timing

Insights generated from research can inform every step of the digital product lifecycle. We will demonstrate how research can add value at multiple points.

Communication

Many research methodologies overlap between digital and consumer industries, but researchers need to be cognizant of how they communicate insights across different contexts and applications.

Building Consumer Knowledge

Business intelligence and **competitive intelligence** complement these tiers of consumer knowledge.

Product

Goal: understand **consumer behaviors with and reactions to products**

Example assets: Product roadmap, service blueprint

Consumer

Goal: understand **consumer needs & pain points**

Example assets: User personas, user journeys

Market

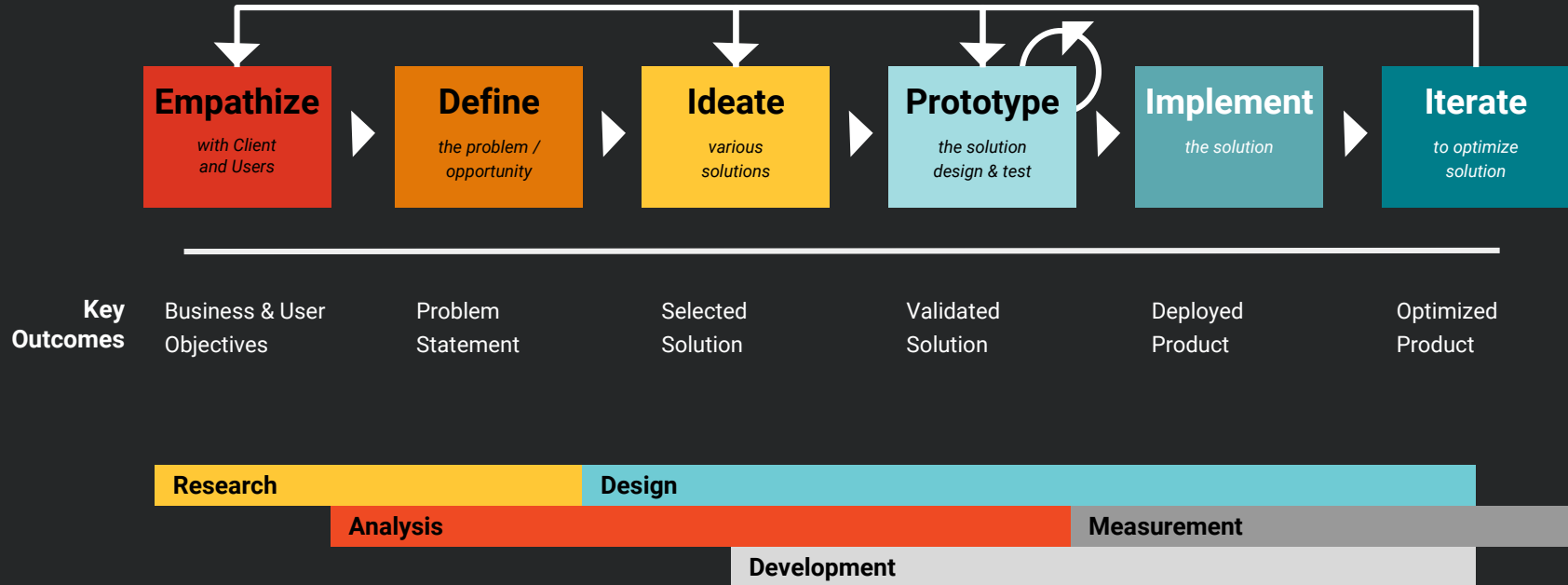
Goal: understand the **opportunity for products** in the marketplace

Example assets: Competitive analysis, business case study

Iterative Updates

Periodically validate knowledge at each level to reflect changing market conditions, competitors, and customer needs/ expectations

Nertery Product Management Framework



Our Ideal Digital Product Priorities

Desirability:

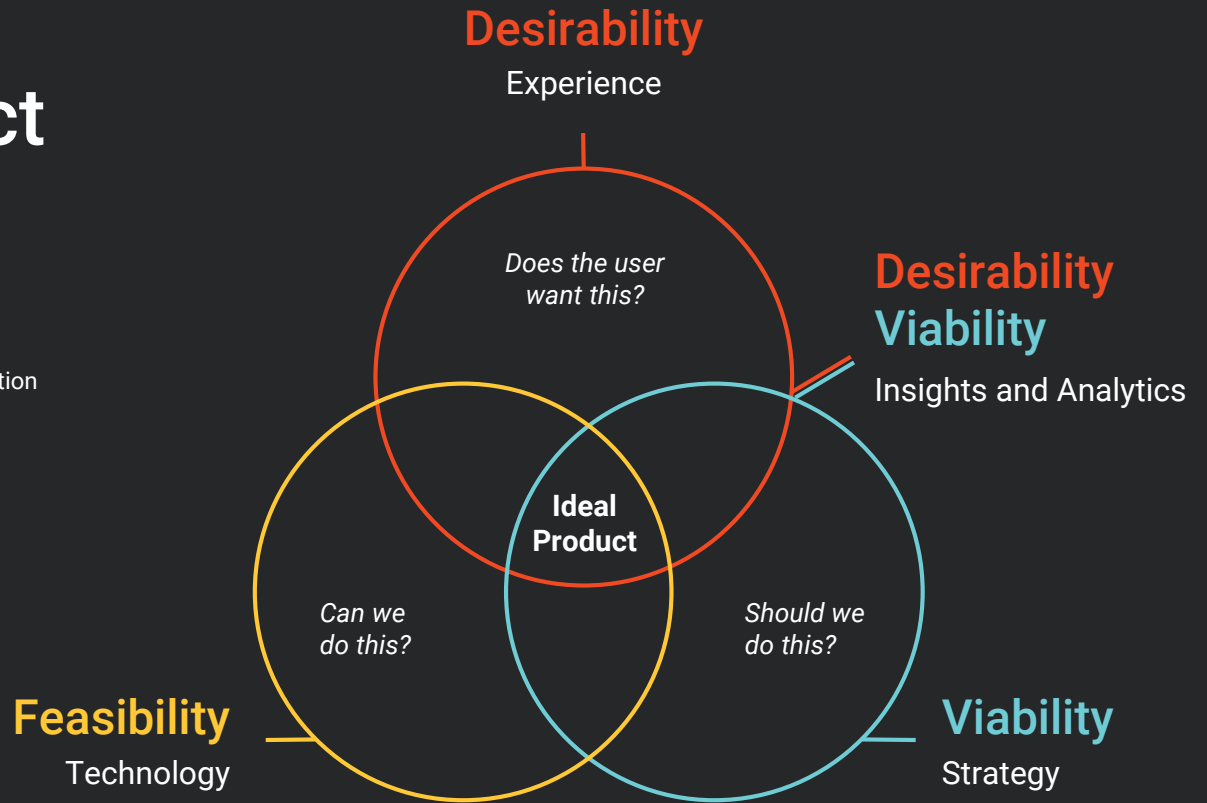
Do users want this? What is the value proposition for users? Does it solve a real problem?

Feasibility:

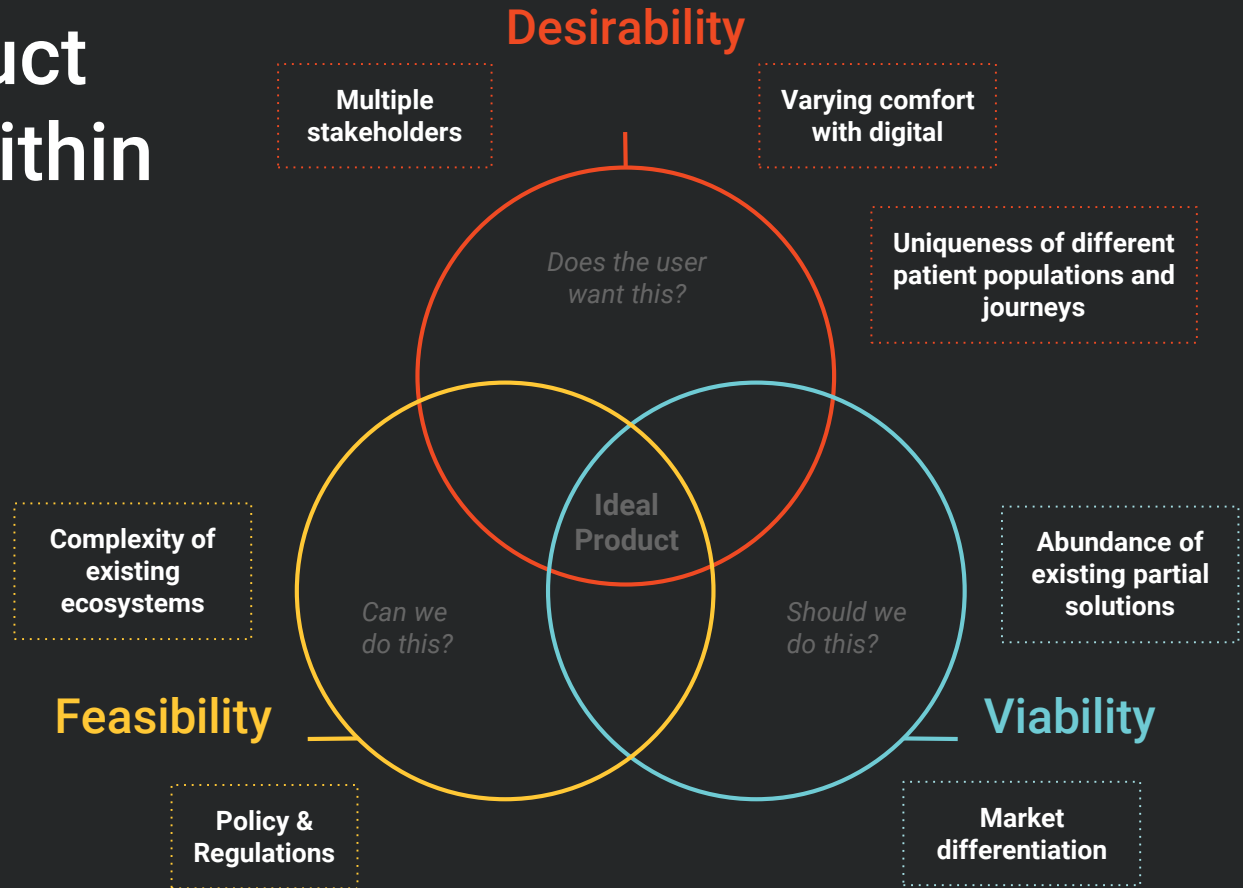
Is it possible within our technology and operational constraints? Do we understand the effort/complexity to build it? What needs to happen for this to be possible?

Viability:

Does it align with leadership's intent and our product vision? Can it generate a return for the investment required? Can our company support it?



Digital Product Pressures within Healthcare



Case Study #1

Using Insights to Assess Market Need and Identify Key Product Attributes



The Ask

A global healthcare provider organization approached Nerdery to define a new digital solution grounded in real stakeholder experiences to improve treatment engagement and outcomes among adults with a specific diagnosis of serious and persistent mental illness (SPMI).

The Context

Case Study #1

Treatment Engagement
of Adults with SPMI

Issue complexity

Patient population with complex needs affecting treatment and engagement with technology

Multiple stakeholder groups involved in treatment: patients, caregivers, healthcare providers

Client characteristics

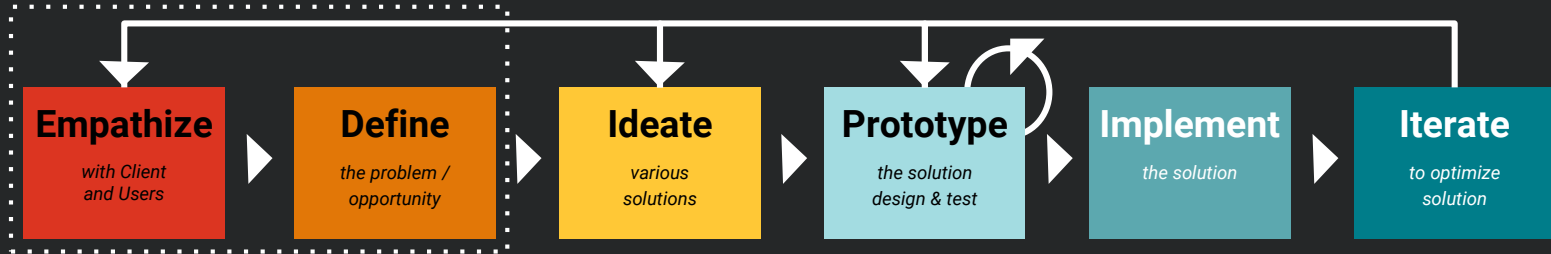
Client represented provider perspective

Strong initial hypotheses about market viability and desired functionalities of digital solution

Our Approach

Case Study #1

Treatment Engagement
of Adults with SPMI



The Outputs

Case Study #1

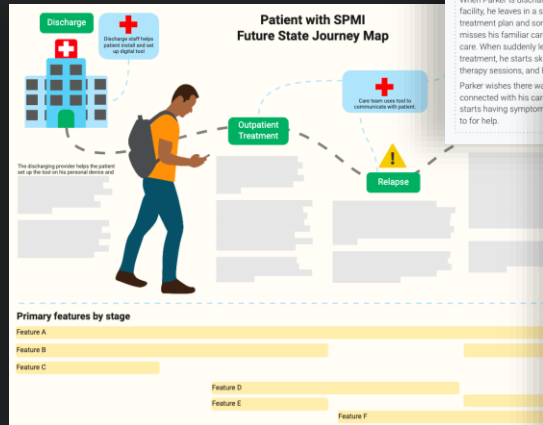
Treatment Engagement of Adults with SPMI

Competitive Landscape Analysis

Personas and Market Truths by stakeholder group: Patient, Caregiver, Provider

Current State Journey

Future State Journey



Adult with SPMI

"I have SPMI and am learning how to deal with it. For the longest time, I thought I was alone and no one got me. I was scared. But now I have a doctor who put me on meds that actually help. I can contact her and I have the support of peer groups. I started feeling way better about myself. I have hope again."

Patient's Story

Parker has faced numerous challenges while experiencing SPMI. **He fell out of control of his own care journey.**

When Parker is discharged from an inpatient care facility, he leaves in a stable condition, armed with a treatment plan and some medication. But Parker misses his familiar care team and the continuity of care. When suddenly left in charge of his own treatment, he starts skipping medication, missing therapy sessions, and has a relapse.

Parker wishes there was a better way to stay connected with his care team so he can start having symptoms to look for help.

Care Journey Phase Focus:

Symptomatic	1st healthcare encounter	Emergency Dept.	Inpatient Stay	Discharge	Outpatient Treatment & Support	Relapse	Remission
*	*	*	*	*	*	*	*
*	*	*	*	*	*	*	*

Needs

- Lorem ipsum dolor
- Lorem ipsum dolor Lorem
- Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor
- Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum
- Lorem ipsum dolor Lorem ipsum

Goals & Motivations

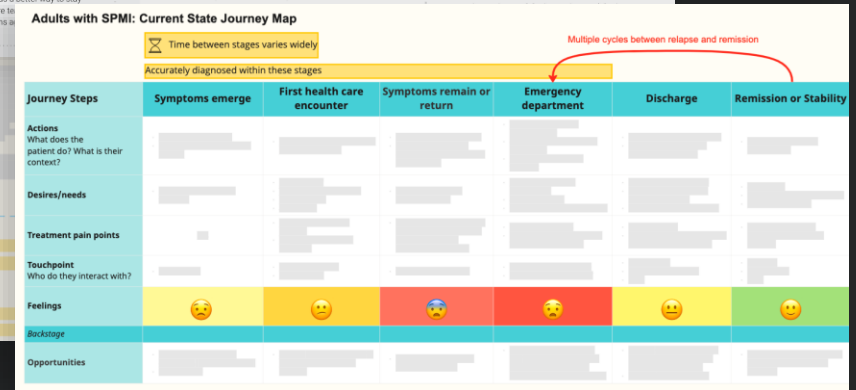
- Lorem ipsum dolor
- Lorem ipsum dolor Lorem ipsum dolor
- Lorem ipsum dolor ipsum dolor
- Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor
- Lorem dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum Lorem ipsum dolor

Challenges

- Lorem ipsum dolor Lorem ipsum dolor
- Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor
- Lorem ipsum dolor
- Lorem ipsum dolor Lorem ipsum dolor

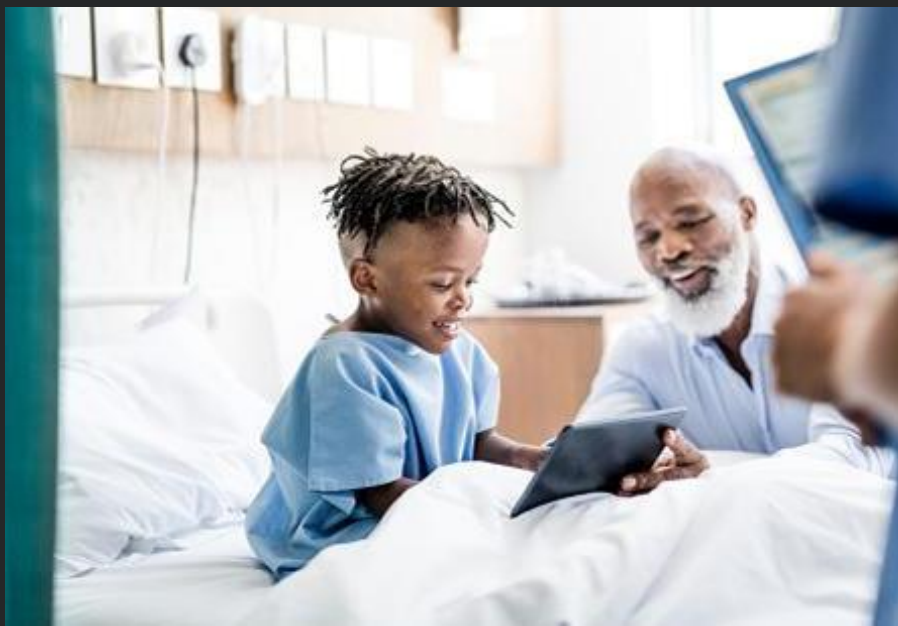
Use of Technology

- Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor
- Lorem ipsum dolor Lorem ipsum dolor



Case Study #2

Using Insights to Assess User Experience and Improve Product Attributes



The Ask

A global healthcare provider organization approached Nerdery to help build and refine a new digital solution to improve screening of and treatment for children and adolescents' mental health conditions during general wellness visits.

The Context

Case Study #2

Evaluating Mental Illness in
Children and Adolescents

Issue complexity

Patient population is underserved, especially those in rural and low-income areas

Providers and caregivers already navigating plethora of digital solutions for simple issues

Client characteristics

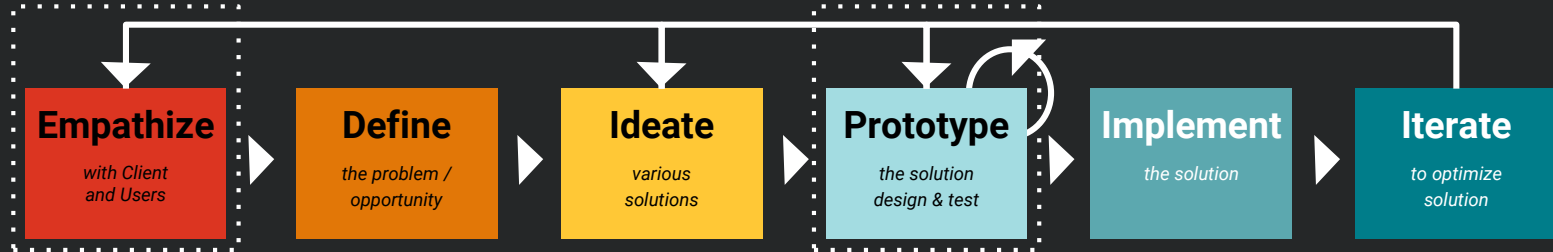
Client represented a provider perspective, but not the provider that would initially evaluate patients or use proposed solution

Difficulty understanding the broader process of product development

Our Approach

Case Study #2

Evaluating Mental Illness in
Children and Adolescents



The Outputs

Case Study #2

Evaluating Mental Illness in Children and Adolescents

User Truths by stakeholder group:
Caregivers & Providers

Feature prioritization

 Preferred / Perceived Value Add Features (Providers More Likely to Use)	 Less Desired / Unsure Value Add Features (Providers Unlikely to Use at This Time)
<p>1. Recommendations + Referrals Tab</p> <ul style="list-style-type: none"> Providers were interested in the potential to more effectively connect patients with resources. In particular, they were interested in a referral engine that helps connect patients to appropriate resources. 	<p>1. Clinician Assessment/Interview + Scores</p> <ul style="list-style-type: none"> All providers indicated a lack of time and a general unwillingness to have more structured conversations because they felt they would have to sacrifice rapport with patients. Providers were unsure how to interpret the assessment severity scores because they were unsure what questions patients and caregivers were answering and how scores were being calculated. Providers also expressed current screening process (PHQ-9 etc) is quick and efficient and were unsure how this longer interview process adds benefit. Some expressed interview may be more suited for a mental health vs a well child appointment.
<p>2. Blue House Self-Help Tool</p> <ul style="list-style-type: none"> Providers were interested in utilizing a low touch (for providers) tool that can help patients navigate through their mental health conditions and management, especially in situations where resources were not readily available (rural/underserved areas) 	<p>2. Diagnosis Tab</p> <ul style="list-style-type: none"> While rural providers were more inclined to use the diagnosis tab, providers did not look at the tab as a means of diagnosing conditions (and did not express a desire to use it as such). Instead, the tab was perceived as a resource to help them make decisions. Many felt uncomfortable diagnosing based on interview alone and a single well child visit. Perhaps using the tool for follow up visits may be more viable.
<p>3. Appointment Note as Patient Education</p> <ul style="list-style-type: none"> Providers liked how succinctly key information was laid out and felt the page's content was presented in a way that would be helpful for patients. Some providers noted it would be a convenient way for their clinic to build-up their patient education libraries. 	<p>3. Blue House as Automatic Notes</p> <ul style="list-style-type: none"> Providers expressed hesitation about using Blue House as a way to compile their required notes for a visit. They want to document other appointment components, besides the mental health evaluation, including physical exam, labs, medication, or other templated-question flows. Instead, they liked the notes as a patient education / print out but were unlikely to use for their own workflow purposes.

- Several users indicated that facilitating the search**

"It's pretty helpful, handy and said or pretty helpful, are in our area that specialize in those things. So provider, like a new doctor, or psychologist or the"

"It's helpful cuz it has a list accessible list of prov there was a provider that had specialization in th"

"The good thing I liked was able to see the names of various Specialists doctors in the air. So if there's one that resonates with you, one that you think I has previous experience with the condition that your child has. You're able to immediately set it up. You able to take check the insurance to see if the insurance works and then you also able to see what type of therapy would be provided."
- All users also wanted patient reviews of those specialists.**

"I wish there was like a, you know, patient reviews section because again, like I'm very reliant on Yelp. I look at Health grades. I look at how vitals.com anytime I'm selecting a particular therapist or doctor that's like an area, I pay attention to very closely. So I would hope that you include that as well because as a parent you want to make sure that your child is getting access to good health care."

"Hopefully, it's website targets the good doctors in the area and not just the closest one. So, I guess that's another question is I like to see General review and their stats on their knowledge of this."

SPECIALIST

JANE SMITH, PH.D., L.P.

Area of focus:
Anxiety-related disorders, Mood disorder, Attention-deficit hyperactivity disorder in children, Attention-deficit and disruptive behavior disorders, Obesity, Teen depression, Drugs and alcohol

[View Bio >](#)

DAN ROBERTS, PH.D., L.P.

KATE HANSON, PH.D., L.P.

Lessons Learned

Task	Duration
Business objectives	
Opportunity Review	
Objective Setting	0:30
Review top areas of opportunity for ideation (pain point deep dive)	0:40
Activity to	
Pain point	
State, user	
outcome &	
opportunity	
Problem Statement Refinement / Focus Area	2:00
Assessing Objectives	
Identify additional "wins" or pods needed to push forward	
Workshop	
Draft initial statements for ideation	
Design baseline user flow - sketches	
Guides on crafting the Sigma component library	1:00
Brainstorm initial feature lists	1:00
Brainstorming Solutions	1:00
Ideation - Educational Material	
Educational Material covered in facilitation slides	
Consider what the digital product would offer (MVP)	0:10
Brainstorm possible features/solutions	
Begin to imagine experience through wires	
like screening - consistent testing with customer	
Brainstorming Solutions	
Ideation	
Feature and purpose	0:30
Show framework in slide	
Consolidate ideas into clean epics	2:00
Practice epics based on how well they help us meet our objectives	1:00

Lessons Learned

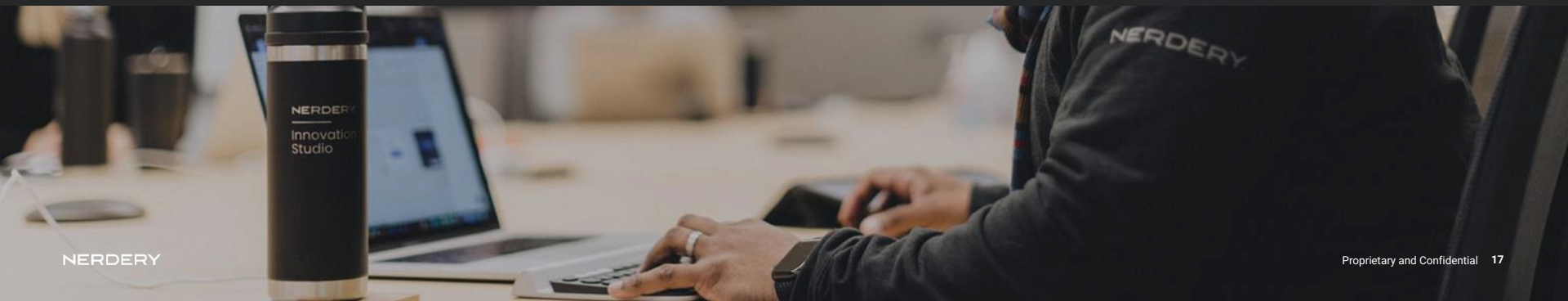
Cross-Functional Team Collaboration

01

Consider when it is most efficient to conduct research prior to vs. in parallel with solutioning/design/development.

02

Align the cross-functional team on research roles and outputs to ensure the product roadmap is user-centric.



Lessons Learned

Working Effectively with Clients

03

Advocate for research in the product lifecycle phases where it is most needed.

04

Improve efficiency by fully understanding client assumptions, hypotheses, and priorities before beginning work.

05

Adapt to whatever breadth and depth of expertise clients have in the subject.

Lessons Learned

Research in the Context of Digital Products

06

Digital products may have to meet the needs of multiple personas and/or involve personalization.

07

Business strategists and insights researchers must work in lockstep.



NERDERY®

Nerdery

info@nerdery.com

nerdery.com/insights-and-analytics

Get in Touch

sameera.kapasi@nerdery.com

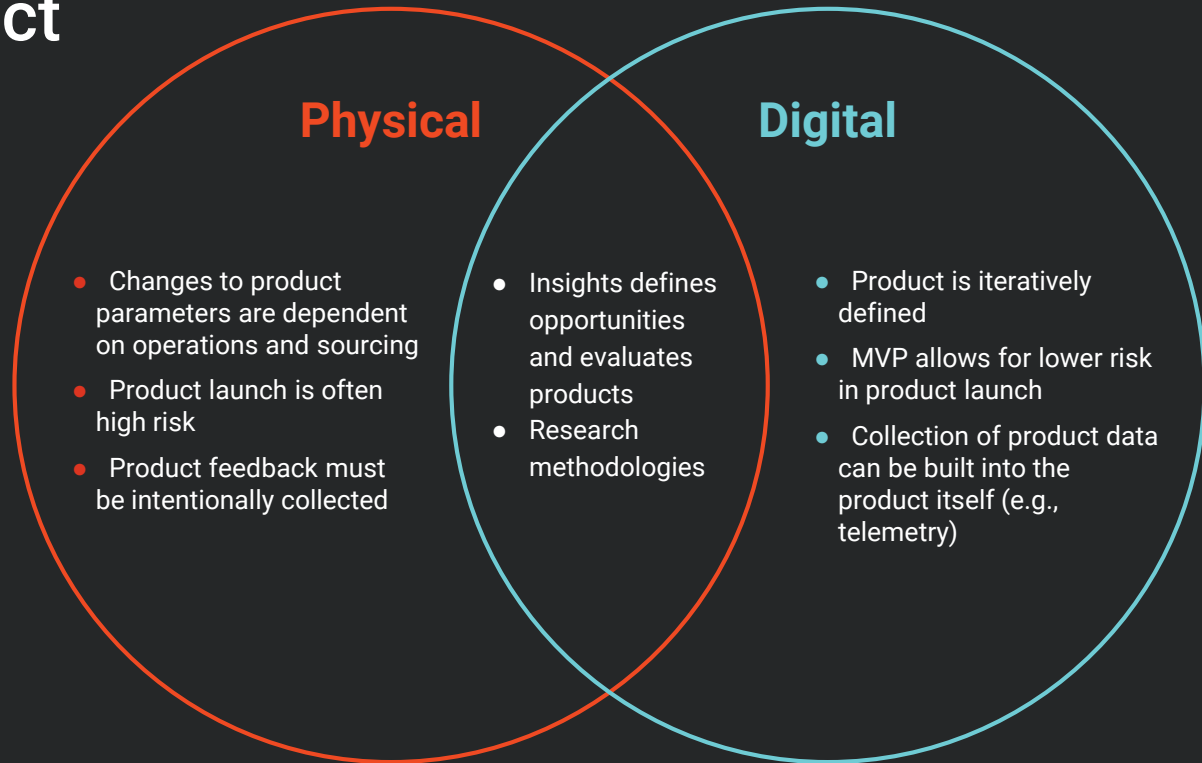
sylvia.kidder@nerdery.com

bridget.potocki@nerdery.com

Appendix

Task	Duration	Description
Objective Setting	0:30	Review top areas of opportunity for ideation (pain point deep dive)
Activity to	0:40	Pain point state, user outcome & opportunity
Problem Statement Refinement / Focus Area	2:00	Assessing Objectives Identify additional "steps" or pods needed to push forward Storyboard
Design baseline user flow sketches	1:00	Guides on crafting the Figma component library
Storyboard initial feature lists	1:00	
Educational Material covered in facilitation slides	0:10	Consider what the digital product would offer (MVP) Storyboard possible feature/solutions Begin to imagine experience through wires User screening - consistent testing with customer
Feature and purpose	0:30	Use prompt brainstorm
Show framework in slide	2:00	Consolidate ideas into clean epics Prioritize epics based on how well they help us meet our objectives

Physical vs. Digital Product Contexts



Communicating Insights within Digital Product Teams

Defining Market Opportunities

Monitor information relevant to a company's market - trends, competition - to support informed decision making across domains

Shaping Product Vision

Prioritize the ideated solutions and features, enabling creation of a comprehensive product roadmap and service blueprint to support effective product development

Evaluate Concepts and Designs

Perform initial work to ensure potential users see value in a particular solution and how the solution is presented, helping to appropriately allocate resources based on user feedback

Provide a Voice for the User

Informal communication with designers during solutioning and wireframing to ensure users' main problems are solved and needs are prioritized