



*designing*  
a User Experience  
that Drives Patient  
Engagement

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Jeanie Barker

Principal, UX Design

PointClear Solutions

# AGENDA

INTRODUCTION

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*key one:* EMPATHY

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*key two:* SIMPLICITY

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*key three:* CLARITY

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*key four:* PERSPECTIVE

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*key five:* VISION

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Q&A



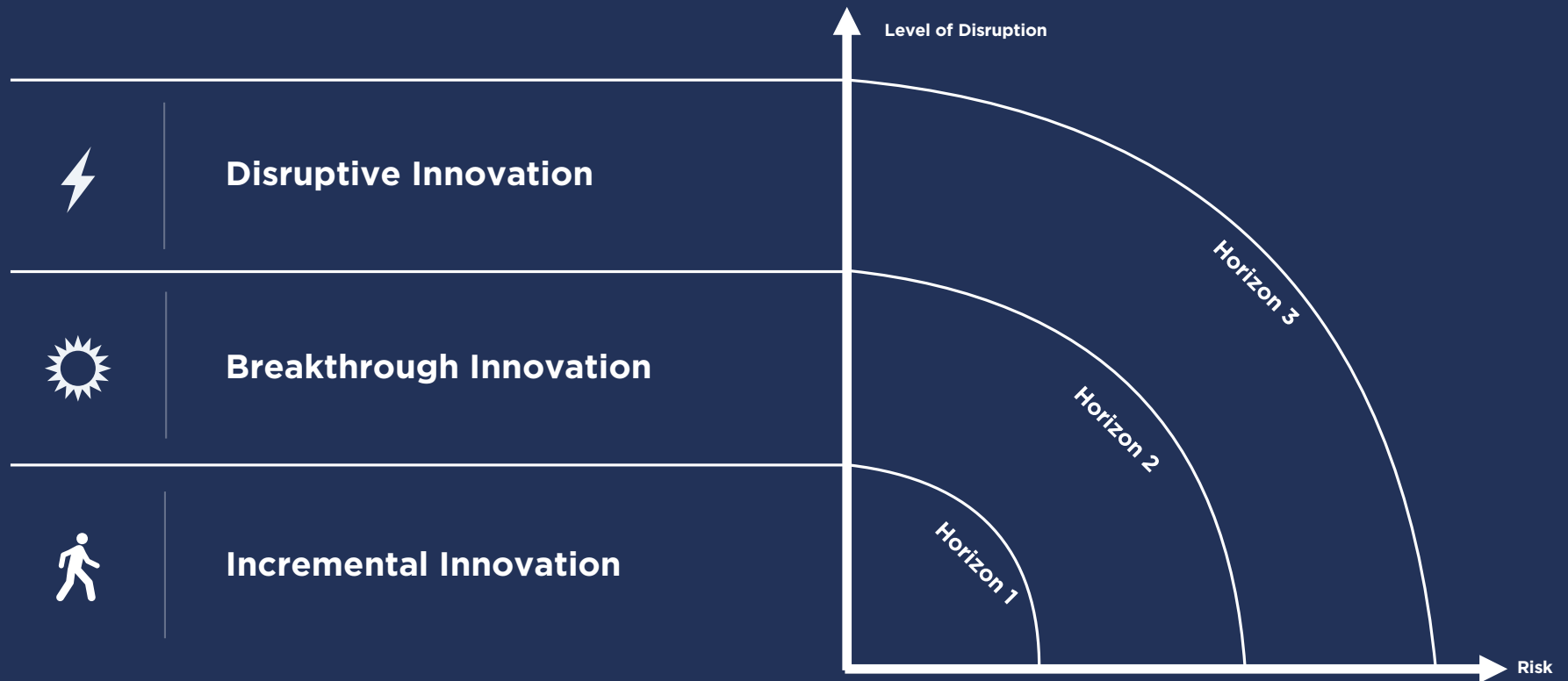


“Just when you are at your weakest and least able to make all the phone calls, traverse the maze of insurance, and plead for healthcare referrals, is that one time when your life may depend on it.”

— ROSS I. DONALDSON

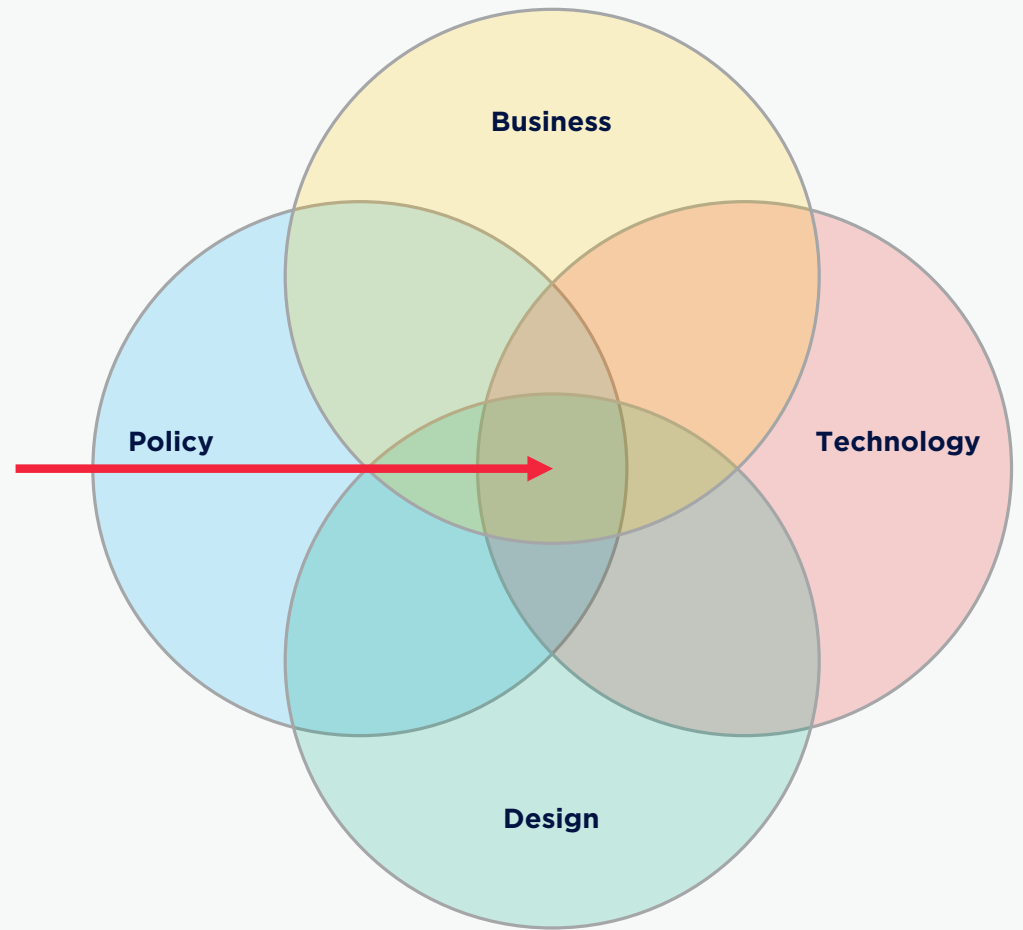
THE LASSA WARD: ONE MAN'S FIGHT AGAINST ONE OF THE WORLD'S DEADLIEST DISEASES

# 3-HORIZONS OF INNOVATION\*



\* Mehrdad Baghi, Stephen Coley, and David White, *The Alchemy of Growth*, New York: Perseus Publishing, 1999

# Innovation.





# Patient Engagement extends beyond patient-facing systems

- ♦ You are always at most 2 degrees of separation away from a patient.



A photograph of healthcare professionals in teal scrubs, with one person holding a clipboard and pen. The image is overlaid with a semi-transparent teal filter. The text "HEALTHCARE IS A TEAM SPORT." is centered in white, bold, sans-serif font.

**HEALTHCARE IS  
A TEAM SPORT.**

01

*Empathy*

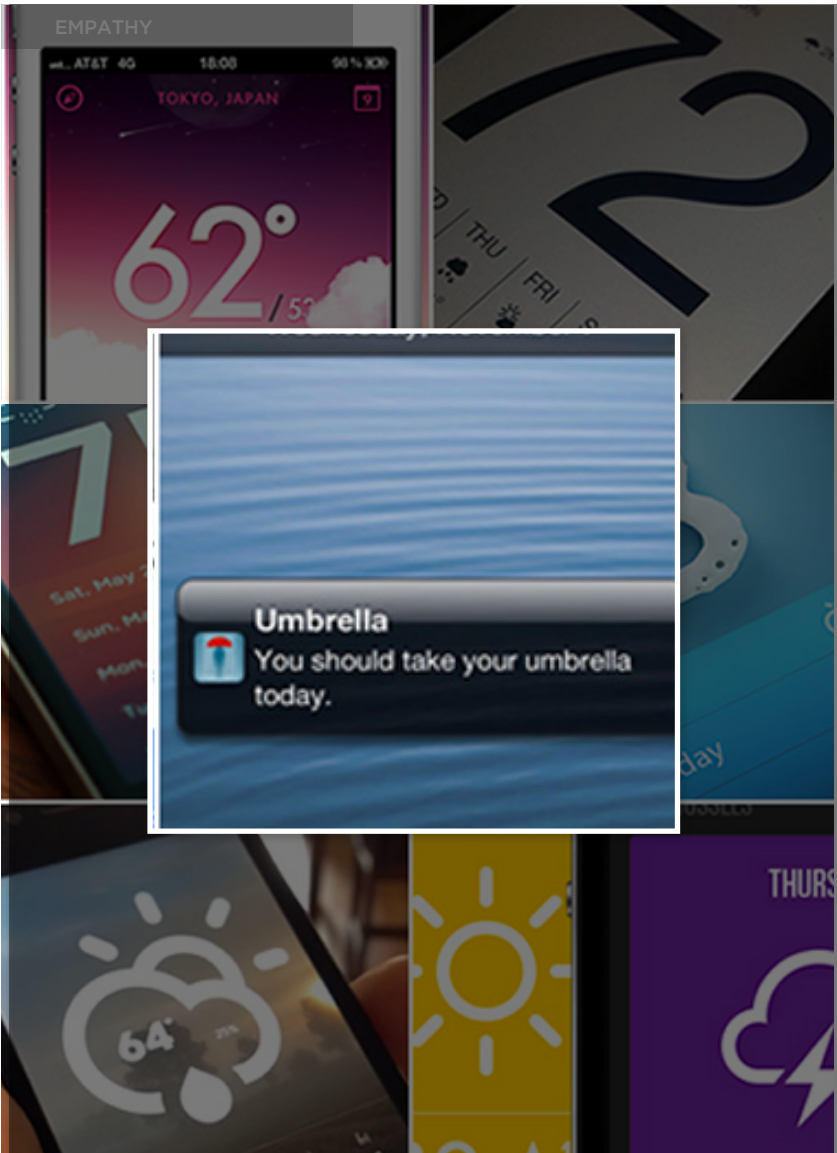
**KNOW THY USER**



# Context is King.

- ◆ Location
- ◆ Environment
- ◆ Tools
- ◆ Activities
- ◆ Emotional State





# Users don't know what they want... until they use it.

- ♦ Hypothesize, but don't presume.
- ♦ Seek subjective answers in narrative form, rather than concrete/objective answers.
- ♦ Start with the “why?”



# Embrace People-Focused Strategic Planning

- ♦ Begin your strategic planning process by asking “Who is the most important ‘person’ for us to focus on this quarter and what are their biggest pains/needs?”
- ♦ Build your product roadmap from there by identifying features that speak directly to the Persona pains you are focused on.

## CANDIDATE PERSONA

### I'm Mark Cheng.

I'm a recent first-time father and financial planner living in New York City. I have been enrolled in the CFA Program for six months and am signed up for the Level I exam in July.

It's been tough juggling my professional responsibilities with my new fatherly duties, so I have to use my limited free time wisely to prepare for the exams.

#### DEMOGRAPHICS

|                |                              |
|----------------|------------------------------|
| Age            | 27                           |
| Seniority      | Mid-level                    |
| Occupation     | Financial Planner            |
| Location       | Americas / New York City, NY |
| Marital Status | Married                      |

#### ENGAGEMENT

|                                   |                                                                                                                    |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Archetype                         | CFA Program Candidate                                                                                              |
| Mark's Needs                      | Mark needs reassurance that the CFA is worth the time, money, and effort. He also needs help paying for the exams. |
| Mark's Goal                       | Mark wants to get the charter as quickly and affordably as possible.                                               |
| Mark's Value to CFA Institute     | Candidates are why the program exists.                                                                             |
| CFA Institute's Primary Objective | CFA Institute wants to ensure that Mark succeeds in getting the CFA designation.                                   |
| Primary Channels                  | Enterprise Website and Email                                                                                       |
| Web Segments                      | 'Anonymous' or 'Candidate'                                                                                         |
| Key Tasks                         | Prepare for the exam, Take the exam, Get exam results                                                              |
| Key Web Sections                  | Practice Tests, Fee Schedule, Exam Calendar, Scholarships                                                          |
| Keywords                          | 'study tips', 'exam ticket', 'results', 'mock exam'                                                                |

#### KEY METRICS

|                     | CURRENT                                 | TARGET          |
|---------------------|-----------------------------------------|-----------------|
| NPS                 | 33 in 2016                              | Not yet defined |
| Engagement Duration | 4 years on average; range is 3-12 years | Not yet defined |
| CX Score            | 73 in 2016                              | Not yet defined |
| Velocity            | Not Applicable                          | Not yet defined |



## EMPATHY



## WEB CHANNEL CONSIDERATIONS

### DESCRIPTION

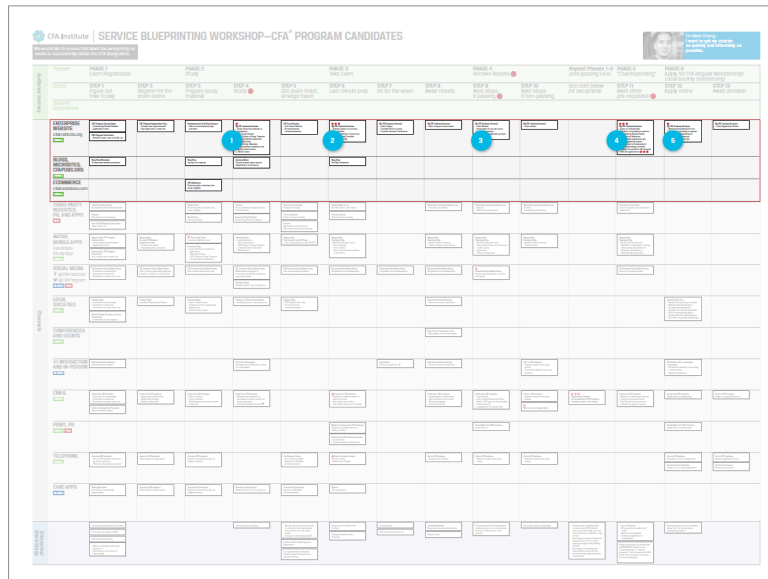
At present, the web channel consists of the enterprise website; a constellation of bespoke sites and microsites for products, marketing campaigns, events, regions, and more; and an unused eCommerce presence.

CFA Program Candidates primarily interact with CFA Institute through the web channel.

### WEB CHANNEL OBJECTIVES

The web channel is crucial to the success of candidates of the CFA Program. Candidates rely on the enterprise website to accomplish key tasks like applying for scholarships, registering for exams, finding and accessing study material, receiving exam updates, understanding their results, and applying for CFA Membership. Many of these functions are found within their account dashboard and require login to access.

Although candidates go to the enterprise website to access tools and information, CFA Institute primarily interacts with candidates through email. For example, CFA Institute pushes out several updates that are timed to the exam calendar.



This image was created as part of a service blueprinting workshop conducted Spring 2017. See the assets folder for the original PDF.

Many specific study tools are scattered across channels. For example, candidates can obtain the official CFA Curriculum via an eBook (which is hosted on a third party site) or a print curriculum book (available from CFA Institute or Amazon). Or they can download an iOS Study App, or they can sign up for study classes offered by providers like Kaplan. The enterprise website should give context to these many options and help candidates decide which tool would be most suitable.

When candidates need help, they reach out to the Contact Center, the customer service desk for the CFA Program. The enterprise website should help provide answers to common questions and enable self-service for common tasks so as to reduce the load on the Contact Center.

When it comes to community, many candidates use online forums like AnalystForum to discuss the exams and to commiserate.

### KEY WEB TOUCHPOINTS

'Key Touchpoints' are points of interaction between CFA Institute and CFA Candidates that enable Candidates to progress through their customer journey and achieve their ultimate goal of becoming a CFA Member. In the case of the web channel, this would take the form of a page or series of pages on the enterprise website.

Through a dot-voting exercise conducted during a service blueprinting workshop conducted in Q1 2017, internal stakeholders identified the following key touchpoints:

1. Study Resources
2. Exam Information
3. Results and Next Steps
4. Membership Information
5. Membership Application

### TOUCHPOINT 1 STUDY RESOURCES

Candidates need study resources to succeed on their exams. This touchpoint should gather those resources into one place. Since there are many ways to study, candidates seek recommendations on which to use. This touchpoint could also provide some guidance.

#### Touchpoint Functional Requirements

This touchpoint must support the following tasks:

- Reviewing the curriculum eBook
- Selecting an exam prep provider that has been approved by CFA Institute
- Ordering a printed version of the curriculum
- Taking online topic-based practice tests and mock exams

#### Touchpoint Experience Recommendations

- Candidates should be no more than one click away from accessing any given study resource.
- The study resources themselves, such as the eBook or the app, should be user-friendly.

#### Touchpoint Key Content

| CONTENT                                  | CATEGORY     |
|------------------------------------------|--------------|
| Shortcut to CFA Course of Study Chapters | Makes Easier |
| Shortcut to Chapter Review Questions     | Makes Easier |
| Shortcut to Practice Tests               | Makes Easier |
| Shortcut to Video Study Materials        | Enriches     |
| Shortcut to the Study Planner            | Makes Easier |
| Shortcut to Mock Exams                   | Makes Easier |



**ACTION TIP:**

Set up a User Advisory Program that allows you to get continuous feedback from your user base, and require your project teams to listen to/observe the feedback first hand.





# 02

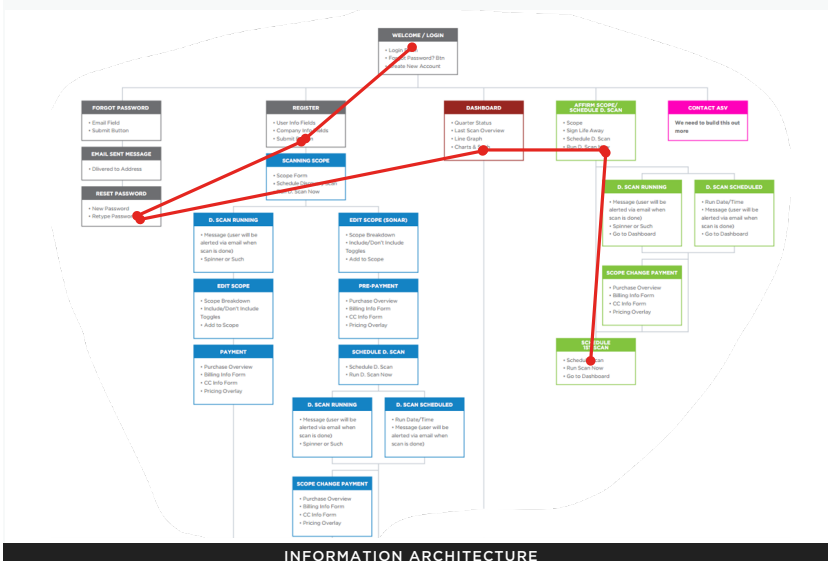
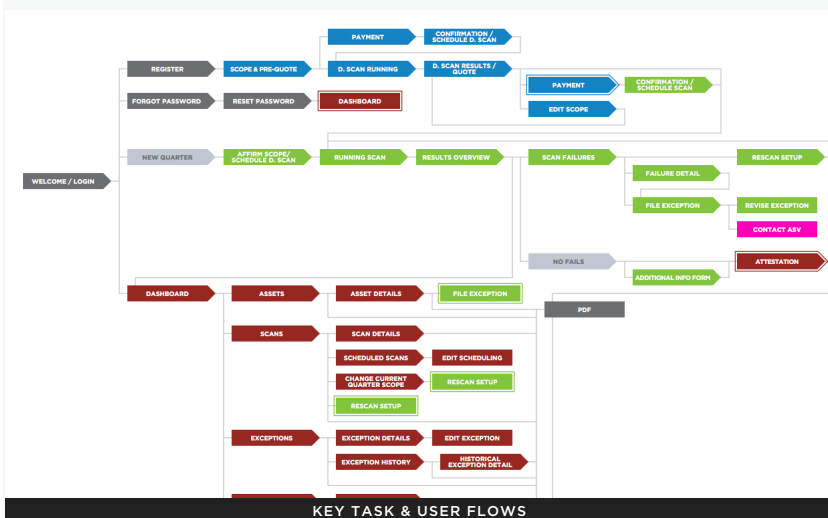
*Simplicity*

**CONFIDENCE IS  
THE OBJECTIVE**



# Be ruthless about information hierarchy and content strategy.

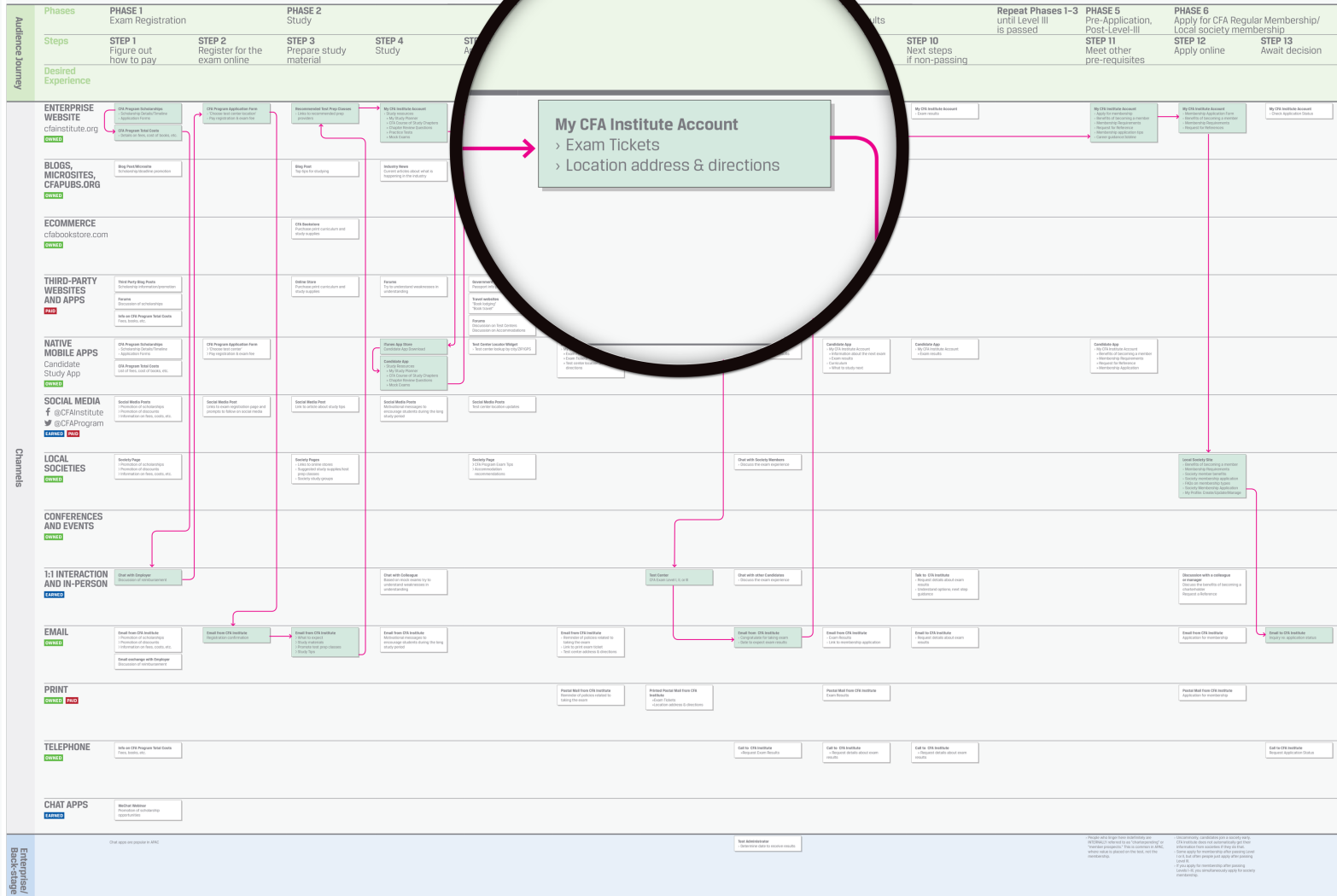
- ♦ Consider not just the “organization” of information, but how that information maps across user tasks.
- ♦ Map content to User Journeys.



We would like to ensure that Mark has everything he needs to successfully obtain the CFA designation.



Hi Mark Cheng,  
I want to get my charter as quickly and affordably as possible.



# Assume people will not receive training.

- ◆ Design for a “first-time” user experience.
- ◆ Minimize text and instructions.
- ◆ Test often and continuously.
- ◆ Simplicity is a process, not a concrete end-state.



# Design as a team.

- ♦ Agile software development practices allow for frequent and ongoing cross-functional team collaboration.
- ♦ Create design-developer design sessions.
- ♦ Partner with design for requirements definition.







**ACTION TIP:**

Actively identify and manage the type of content that exists in your application (content that informs, alerts, makes tasks easier, and enriches!) and ensure you are leveraging it appropriately – and in a timely manner.

# 03

*Clarity*

**MAKE THE SOFTWARE  
DISAPPEAR**



# Design is done when there is nothing more to take away.

- ♦ Aim to have as few features as possible.
- ♦ Treat every pixel as you would precious, costly real estate.
- ♦ Design for intuition and learning, not just aesthetics.

## Tell a story

PRESENT YOUR IDEAS WELL

You have to be able to tell a story. You have to be able to convey ideas clearly, concisely and purposefully.

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PRESENT YOUR IDEAS WELL

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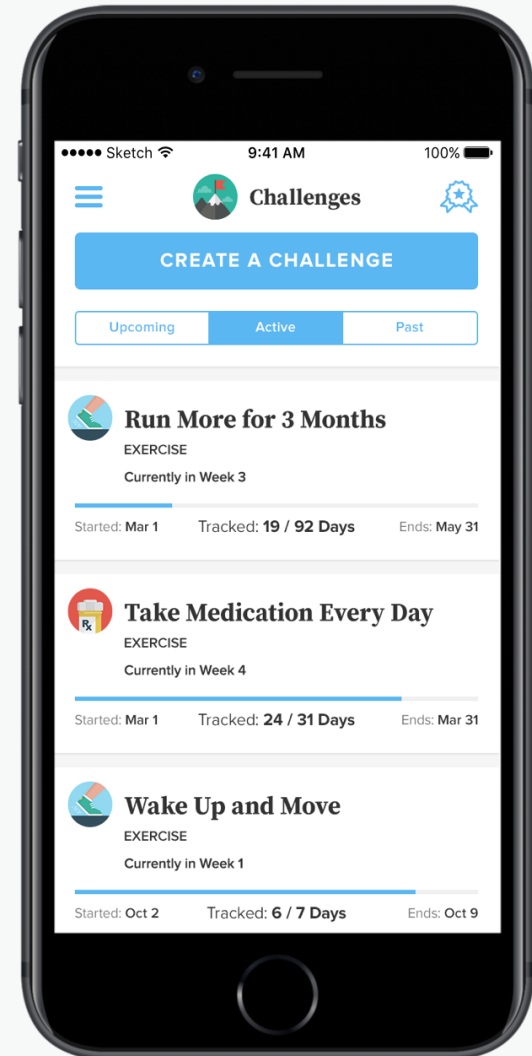
# Define a visual hierarchy.

- ◆ Create a clear and bold design system hierarchy that is consistent throughout your application.



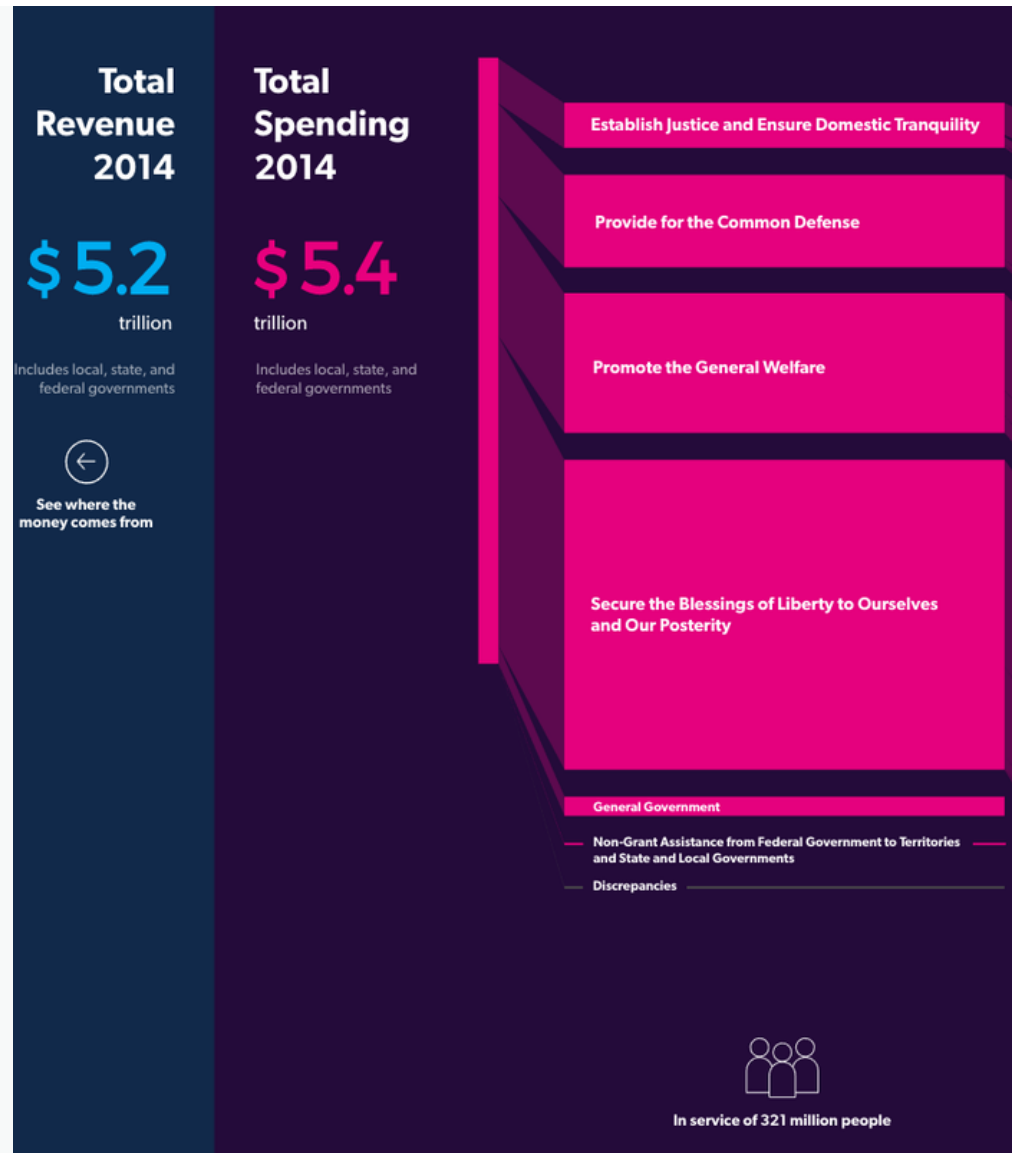
# Help people make decisions.

- ♦ Leverage white space to streamline legibility and improve cognitive efficiency.
- ♦ Use color meaningfully to drive and indicate action.
- ♦ Direct behavior and tasks to help users stay on the happy path.



# Leverage Visualizations to simplify the complex.

- ♦ Pictures tell a thousand words...  
Interactive pictures tell a million.





Total  
Revenue  
2014

\$5.2  
trillion

Total  
Spending  
2014



**ACTION TIP:**

Often times, what is considered a UI design problem is really a “content problem.” UI design is simply knowing how to best serve the right content at the right time.





# 04

*Perspective*

## STICK TO YOUR ~~PRODUCT~~ EXPERIENCE ROADMAP

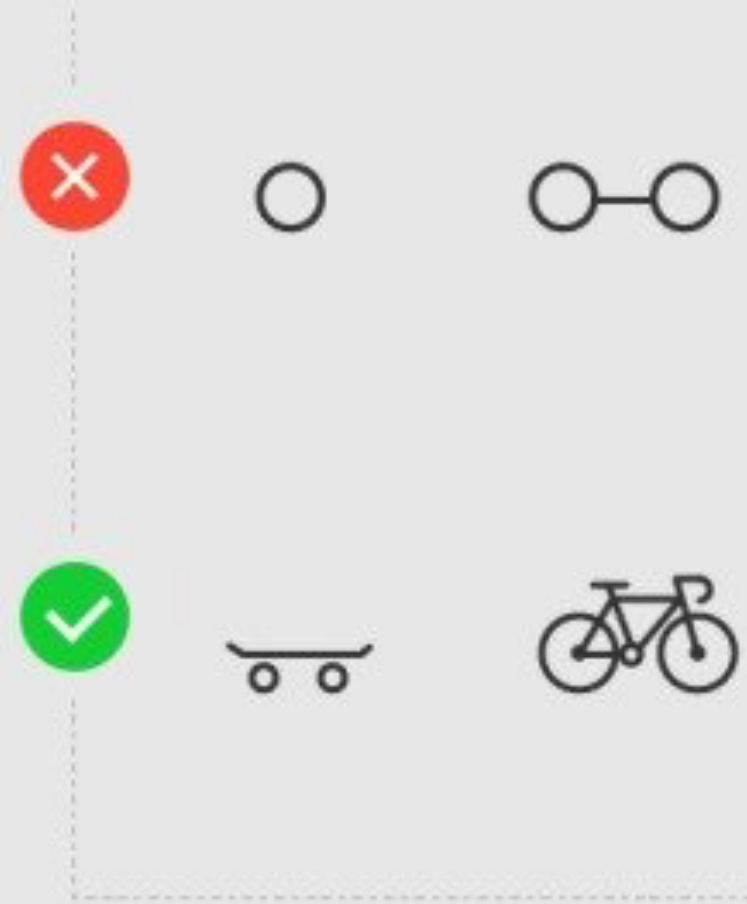


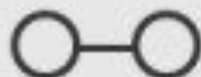
# Define MVP by User Flows, not features.

- ♦ ID the most important tasks your users must accomplish.
- ♦ Define the critical path of features according to those tasks.
- ♦ Decide how “deep” you should dive into each of those features based on how critical they are to the task at hand.

# The MMP represents your quality standards and strategic position.

- ♦ MVP is for validation.
- ♦ MMP is your definition of done.





1 year

2 year





# Solve the right problem at the right time.

- ♦ A “production ready” software product will always have a mixture of MVP and MMP ready features.
- ♦ The timing of a release is almost always critical, but the fidelity of the release is almost always negotiable.



**ACTION TIP:**

Know and articulate the difference between MVP and MMP for your company, then create and define the acceptance criteria accordingly. This is how “delight” features will make their way off the backlog and into production.

# 05

*Vision:*

**FOCUS IS EVERYTHING**

# Know and understand your solution's "externalities"

- ♦ Understand how your system can impact all users within the healthcare ecosystem.
- ♦ Everything in healthcare is connected, so understand the impact your solution will have holistically.





# How does your product improve the patient experience?

- ♦ This is the only question we should be asking ourselves... everything else is noise.



**ACTION TIP:**

Document the best case scenario for the patient that may live at arms-length from your system. Ask yourself “How does your product support this outcome?” and begin to make decisions accordingly.





**WE ARE ALL  
CONNECTED.**

*key one:* **EMPATHY**

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*key two:* **SIMPLICITY**

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*key three:* **CLARITY**

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*key four:* **PERSPECTIVE**

---

*key five:* **VISION**

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A group of four healthcare professionals, three women and one man, are smiling and holding a large white sign. The sign has the text 'We ARE the patient experience!' written on it in a handwritten style. The word 'ARE' is underlined. The sign also has a yellow bar at the bottom with the website 'www.theberylloft.com'. The background is a blurred indoor setting, likely a hospital or clinic.

We ARE  
the patient  
experience!

[www.theberylloft.com](http://www.theberylloft.com)



A group of four healthcare professionals, three women and one man, are smiling and holding a white sign. The woman in the foreground is wearing a white lab coat and has blue nail polish. The sign is held in front of them, partially obscuring their faces. The background is a blurred indoor setting, likely a hospital or clinic.

We  
ARE  
the patient  
experience!

[www.theberylstitute.org](http://www.theberylstitute.org)

The background is a dark blue gradient. In the upper right, there are several light blue sticky notes. One note says 'COURSE CREATION (HELP)', another says 'BOARDING', and a third says 'CLASS'. There are also many other smaller, less legible sticky notes scattered across the wall.

# THANK YOU

Jeanie Barker

UX Principal, PointClear Solutions

[jeanie.barker@pointclearsolutions.com](mailto:jeanie.barker@pointclearsolutions.com)