Concept and roadmap for an internal product to improve collaboration with clinicians
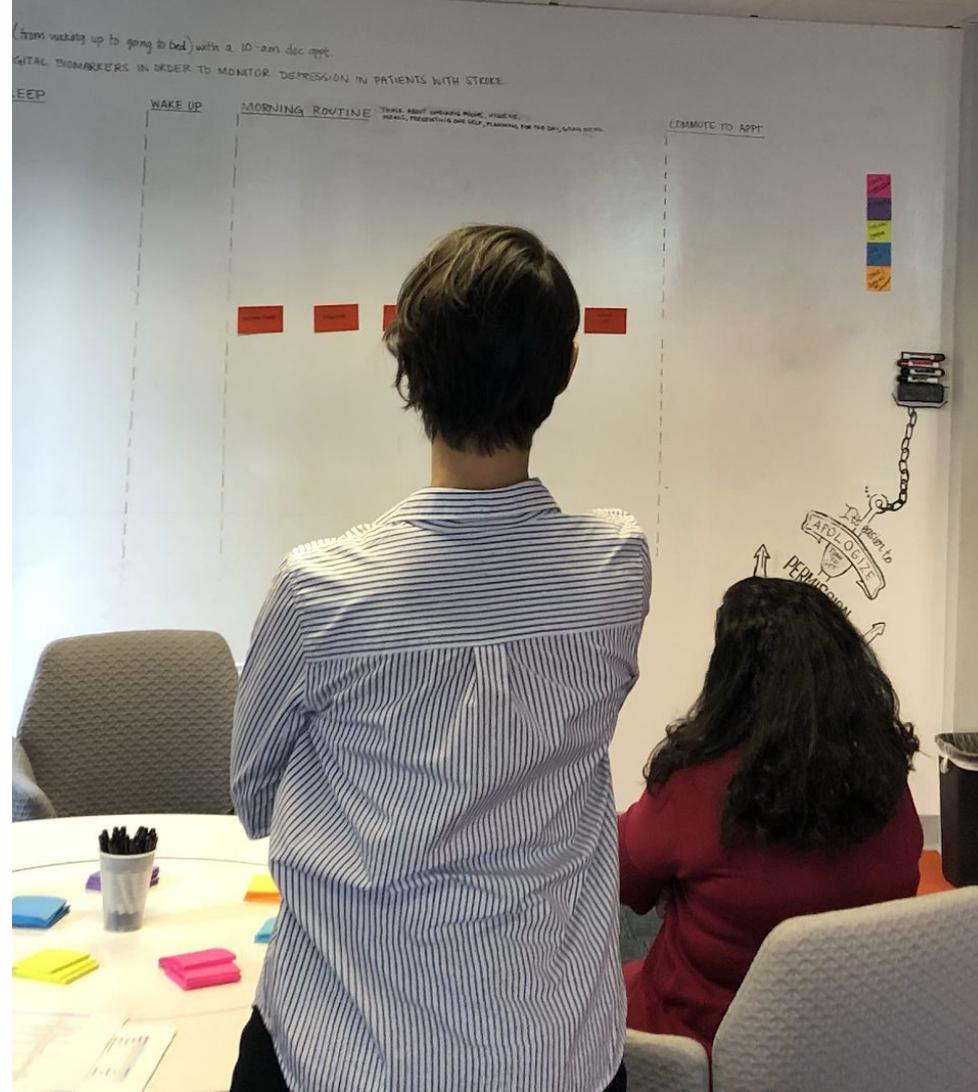
The one where I identified a pain point and created a solution

I pitched an internal project to the leadership team to explore:

"How might we improve our clinician outreach process for future projects?"

Scenario

- Clinician outreach was an essential component of the work of all teams at my department.
- Through conversations with my colleagues, I learned that this process was not standardized or measurable and was perceived as **inefficient, burdensome and time-intensive.**

Task

- I used Design Thinking to create a standardized *clinician outreach* process.
- I recruited 4 teammates to work with me on this project on their spare time.

I conducted **journey-mapping** sessions with staff and clinicians to understand their past **experience** with outreach

UNDERSTAND   DEFINE   IDEATE   PROTOTYPE   TEST

Outcome

Problem statements summarizing key pain points experienced by staff and clinicians.

A key insight was that outreach was only one (yet crucial) step in the process of establishing and maintaining relationships with clinicians.

INSIGHT: While effective outreach was essential to obtain clinician buy-in for a project, staff and clinicians agreed that it was how relationships were managed throughout the project lifecycle that determined clinician openness for future collaborations. Establishing long-term relationships with clinicians was considered the key to effective outreach.

I **prioritized** the most critical problem statements, with input from the Leadership Team

UNDERSTAND   DEFINE   IDEATE   PROTOTYPE   TEST

Outcome

Three **problem statements** prioritized for ideation:

- *How might we identify the best clinical collaborator for a project?*
- *How might we optimize the initial outreach process - from drafting an effective email to obtaining a timely response?*
- *How might we communicate effectively with clinical collaborators throughout a project in order to maintain engagement during and after project completion?*

I planned and facilitated an all-team **ideation** workshop to brainstorm **product** ideas to addressed the problem statements
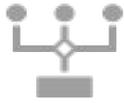
UNDERSTAND   DEFINE   IDEATE   PROTOTYPE   TEST

Outcome

Concept for the **Clinical Collaborators Hub** (aka 'The Hub'), a Salesforce.com customization.

The **vision** and **strategy** for The Hub were defined:

- *The Hub aims to standardize the clinician outreach and relationship management process, while enhancing staff and clinician experience.*

- *The process enabled by The Hub's will be measurable, efficient and consistent across teams; the experience elicited by The Hub will feel human, enjoyable and engaging for staff and clinicians.*

I led a series of **rapid prototyping** sessions to expand on product components, gather **requirements** and obtain early feedback on potential **features**
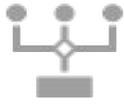
UNDERSTAND   DEFINE   IDEATE   PROTOTYPE   TEST

Outcome

Product requirements document detailing the value, purpose and features of each of the Hub's core components:

1. *Outreach email templates*
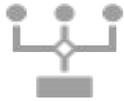2. *Clinician directory*
3. *Clinician communication plan*

Product roadmap outlining goals, priorities and timeline for development.

I **developed** the Outreach Email Templates component and **tested** its **performance** and **user experience** in live projects

UNDERSTAND   DEFINE   IDEATE   PROTOTYPE   TEST

Outcome

Eight staff members **tested** the email templates in three different projects and reported:

- *90% clinician **response rate** within 48 hours;*
- *Decrease in **time** spent crafting outreach emails;*
- *Increase in staff **confidence** reaching out to clinicians across levels of hierarchy.*

Empathy as the path to buy-in

- I was intentional about involving staff from different department levels in all stages of this project. Understanding their experiences and motivations, helped me win their buy-in and ensure that the end-product delivered value for them.

Experimentation and short iterations helped me keep the project moving

- Everyone participating in this project was doing so in their spare time. It was my job to figure out how to maximize their participation and keep the process as efficient as possible.
  - I initially tried to capture my teammates' experience through asynchronous methods, assuming that this was more convenient for them. After a few failed attempts, I switched to in-person journey-mapping sessions, which turned out to be a more efficient and enjoyable method.

"We couldn't do the work we do without involvement from clinicians, but starting and maintaining these relationships is a continuous and complicated effort. Brenda understood the value of great outreach, and advocated for this project with management. As an user of The Hub, I really appreciate that she heard our pain points and enacted a design-thinking based solution!" - Teammate