

Context

We're excited to see how you approach this exercise. There's no single right answer - our goal is to understand your thinking and problem-solving style. We know that in reality, projects like the ones outlined here could take weeks to complete. For the purposes of this case study, we expect you to spend **no more than 3 hours preparing**. We are looking for glimpses of the following:

- Your ability to gather and clarify requirements
- Your ability to communicate effectively and visualize data clearly to general teams
- Your data architecture and system design thinking (pipelines, schemas, marts, etc.)
- Your analytical reasoning and problem-solving skills

Time Guidance

You do not need to fully implement everything. We encourage you to go deeper in one or two areas and provide high-level approaches for the rest. A reasonable way to allocate your time might be:

- **15 minutes:** Identify clarifying questions you would ask in requirements gathering.
- **60 minutes:** Review data & outline your initial modeling approach.
- **45 minutes:** Sketch Client report view and define a first-pass Engagement Score.
- **30 minutes:** Organize your slides/wireframes and rehearse your presentation.

Data Goals

Koda has several data goals for 2025/2026. For this case study, we're not expecting you to design all of them in full - just show your initial thinking and where you might dive deeper.

- **Patient Engagement Score:** Quantify each patient's likelihood of completing their ACP guide, based on engagement across channels. This would help ClinOps prioritize phone calls, which are the most resource-intensive outreach activity.
- **Monthly Client Report:** Deliver reports that clearly communicate Koda's value to customers - e.g., patient engagement metrics (accounts created, ACP completions, care plan signatures) and insights into patient preferences (values, care location, quality-of-life priorities).

Data Files

We have provided you 5 data files:

1. The first set of data files (3 files) is engagement data:
 - a. **Email Engagement Data:** Covers 3 activation emails (Email 1, Email 2, Email 3). Includes delivery status, open timestamps, and link click activity
 - b. **Text Message Engagement:** Captures delivery confirmation. Tracks whether the account creation link was clicked
 - c. **Phone Call Data:** Logs outcomes for 3 call attempts. Records if calls were answered, went to voicemail, or were unanswered
2. The second set of data files is app data (2 files):
 - a. **App Engagement Data:** Tracks patient milestones: referral date, account creation, guide start date, guide completion date, and guide signature date (final step in the process)
 - b. **User Inputted App Data:** Details some demographics data and user-inputted app data. Please review the headers of each column for what members are able to input as choices.

Presentation Objectives

Create a short presentation (≤ 15 slides), OR walk us through visuals and notes in another format you're comfortable with. Not every detail needs to be on a slide - you can address items verbally as well.

- **Requirements Gathering:** The reporting requests we've given you are deliberately vague. What would your process be to fully gather requirements? What clarifying questions would you ask?
- **Report Design:** Rough sketch of the monthly report. Hand-drawn wireframes, bullet-point outlines, or low-fidelity visuals - fidelity isn't important. We expect this will reflect only 30-60 minutes of work with limited information. Our goal is to see how you create an MVP sketch to drive further requirements gathering and showcase your analytical thinking.
- **Patient Engagement Score:** Propose a first-pass definition of an Engagement Score. How would you calculate it with the data provided, and what extra data (if any) would make it better? What clarifying questions do you have about the request?
- **Data Architecture:** Given the source data, the monthly report and the request for a patient engagement score. How would you design the pipeline (views, marts, warehouses - whatever framework you like to think in). If you're unsure, what questions do you need to answer and talk us through how those answers would drive different design decisions.

Guidelines and Additional Context

- **Format:** After your presentation, we'll move into a Q&A discussion
- **Assumptions:** We don't expect you to have full context. Make reasonable assumptions and proceed as if you had the authority to define missing pieces.
- **Logistics:** The interview will take place via Google Meet with around ~ 5 Koda team members