[Company]

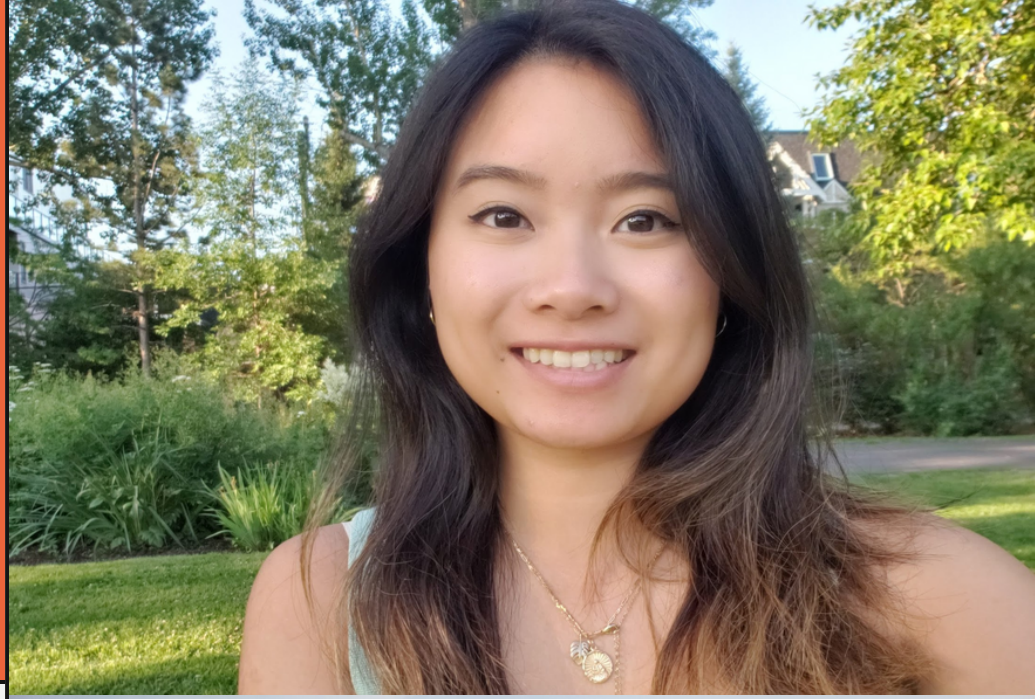
Helen Phan

User Experience Researcher Candidate

[Date]

Overview

Helen Phan



May 2017 - December 2018 - Research Coordinator at Western University

- Academia based research, recruited research participants and learned how to synthesize data

January 2019 - December 2019 - Account Manager at OnCall Health

- Developed customer empathy and a deep understanding on how to ask the right questions

December 2019 - May 2021 - Product Manager at OnCall Health

- Asked 'why' and see problems from a bird's eye view

Introduction

OnCall Health

B2B telemedicine platform that serves SMB, Midmarket & Enterprise Healthcare providers.

The goal is to supplement in person care with a virtual healthcare solution.

North Star: Completed Appointments

Case 1: Onboarding

Context

5 Step process - includes download
40 minutes to onboard every new provider
150 of 200 support tickets everyday due to onboarding

Impact

1. Healthcare Providers
2. Patients
3. OnCall

Timeline: 3 weeks for evaluative research

Why?

Difficulty onboarding leads to unsuccessful provider-patient appointments, causing frustration for all end users.

Difficulty onboarding leads to users less likely using OnCall, users experiencing distress during appointment, poor user experience, higher churn rates and more time spent with customer success.

Research Statement

We want to better understand how users interact with onboarding, in order to improve the onboarding experience.

My Role

Product Manager

- Strategize how onboarding affects north star metric of completing 100% of appointments
- Recruit existing healthcare providers for usability test
- Recruit non customers for usability test
- Review support tickets for common themes
- Conduct Research
- Synthesize & analyze results

Collaboration

- Gather buy in from from CEO, Sales, Marketing, Engineering & Customer Success
- Conduct Research with UX Designer
- Share early findings with VP Engineering
- Recruit users with Customer Success
- Synthesize and share information with Stakeholders
- Share information with entire company (30 people) to gather feedback and insight

Questions

Can users successfully onboard onto the platform independently?

Why are users struggling to onboard?

Onboarding is a 5 step process, at which point are people getting stuck at and why?

What do users do once they get stuck?

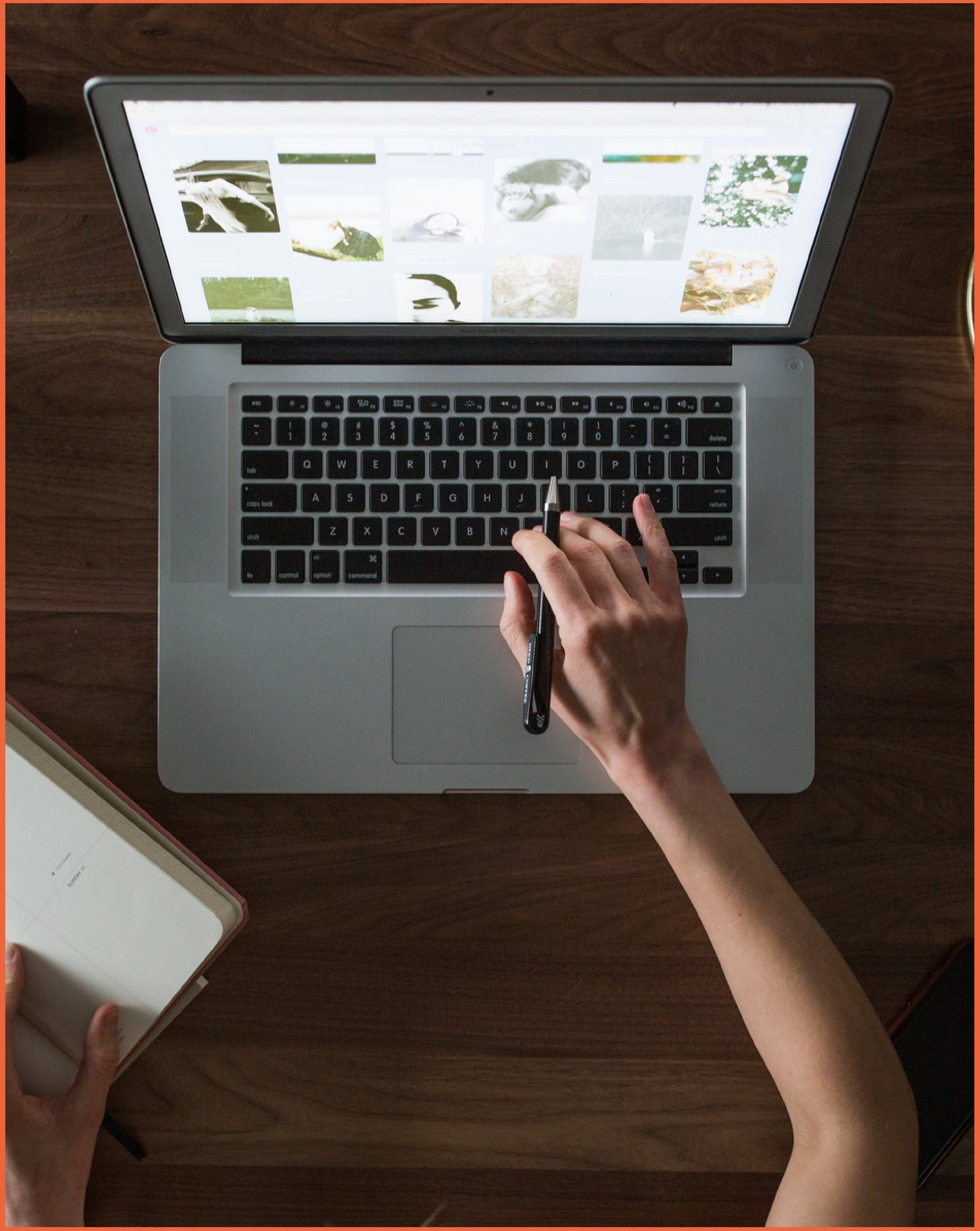
What is the feeling that a user gets when they get stuck? Do they read support guides, call into support or give up?

What solutions are helpful to users?

What is the information that is most helpful for onboarding?

Goals

- Discover current processes for how users interact with onboarding, and how they feel about the overall experience
- Learn about user pain points, frustrations, and barriers about onboarding
- Learn what information users are looking for when they get stuck in onboarding



Methodologies

Usability Test
Identify Themes
Qualitative Analysis

Usability Test

Lead by Helen
Collaboration with UX Designer
Duration: 45 minutes
Conducted over Google Meets

5 Existing Healthcare Providers
5 New Healthcare Providers

Can this user successfully onboard onto the platform independently?

1. Create new account for user
2. Share Screen
3. User will log on
4. User will walk through Onboarding and Think-Out-Loud

Before we can bring in research participants we must send out a survey to get the appropriate participants. We should aim to send this research survey out to 100 people. From there we'll get maybe 20-50 responses, and then it will be narrowed down by people that actually want to come.

1. What is the total number of health care providers in your organization?
2. How many individuals in your organization are currently using OnCall health?
3. What devices do you primarily use the OnCall Health platform on?
4. How often do you use the OnCall platform in a week?
5. How well does OnCall Health integrate with your existing workflow?

Identify Themes

Lead by Helen
Collaboration with Customer Success
Sourced from: Zendesk Tickets, Email & Calls within a 1 year span

1. Synthesize themes from Usability Test
2. Refer to all Zendesk tickets tagged "Onboarding"
3. Refer to call notes for Onboarding issues
4. Review provider emails regarding Onboarding issues

Quantitative Analysis

Lead by Helen
Collaboration with Sales & Customer Success
Sourced from: Zendesk Tickets, Email & Calls, Salesforce within a 1 year span

1. Review total time spent on Onboarding calls
2. Review total time spent on Zendesk Tickets
3. Review churn rate from users who never successfully onboard

Timeline: 3 Weeks

Recruitment

Week 1

- Recruit 5 existing healthcare providers and 5 new healthcare providers
- 5 Existing providers from Customer Success
- 5 New providers sourced from userinterviews
- $75 Incentive

Testing

Week 2

- Usability test conducted for 1 week over Google Meet with UX Designer

Synthesize

Week 3

- Analyze and synthesize usability tests with UX Designer.
- Results presented at stakeholder meeting.

Results

3 out of 10

Healthcare providers were able to Onboard independently

Healthcare providers struggled with moving past the Welcome Stage.

They were stuck at the Downloading Stage

44 minutes

Was the average time spent on a call or support ticket for Onboarding

For healthcare providers and patients alike, users were stuck at the Downloading Stage.

Answers

Can users successfully onboard onto the platform independently?
No.

Why are users struggling to onboard?

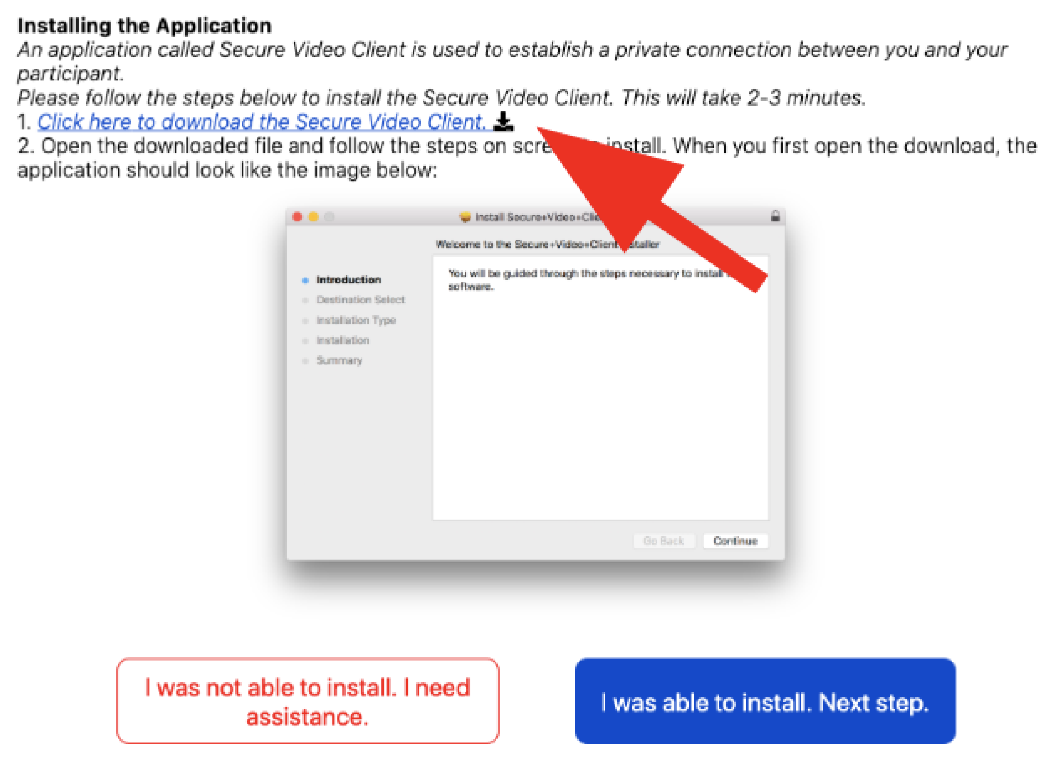
Most users are struggling to download the video client, due to complicated instructions and trying to find the downloads folder.

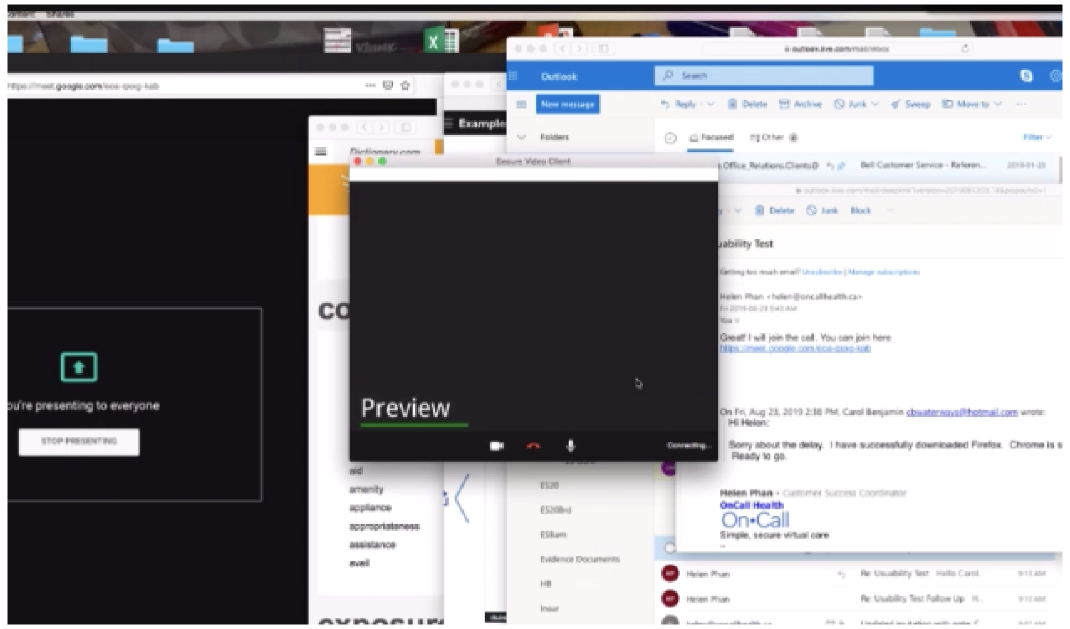
What do users do once they get stuck?

They do not read support guides, they look for a chat or number to contact.

What solutions are helpful to users?

Users only know how to onboard after calling in and Customer Success directs them to click on the "light blue link".





Thoughts & Emotions:

Upon the 'Installing the Application Page': "What is the purpose of this installation? Do I really need it? Oh! I can see that I need to download it because I have read it. OnCall Health has put in a place a step to step with the security of the system. Before reading it, I had a bit of a pause, but now that I've read it I understand that, perhaps, OK, I like that they've planned this for an extra step of security. - CB

Upon opening the Test Window: "What do I do next? Do I close this? I am quite comfortable to open the test window but I don't know where to go from here." - CB

Analysis

Themes Identified

1. Struggle to Download Video Client
2. Links embedded within Onboarding, unsure of where to go next
3. Cumbersome text and images
4. Unsure of how to get help

Business Impact

1. 47% users who don't onboard successfully and don't contact support, will not log in for a year after that
2. 44 minutes per user is spent everyday by CS to help someone onboard

Share Findings

1. Presentation to all Stakeholders
2. Videos embedded & direct quotes of frustration

Task 1: Log On & On Boarding

User Errors:

1. Users would click on the images on the screen thinking that they were their actual screens.

1. Users would not read the content that was on the screen for Onboarding instructions/Troubleshooting instructions.

1. After opening test window, users were not sure about where to return after closing SVC

Opportunities & Ideas to Improve:

- Simplify onboarding with larger images and less text. The most complicated part is “Installing the Application” and clicking on “1. Click here to install”

- Prompt clients to look for their image AND green bar BEFORE their test window opens up

- Add a prompt that tells users to return to their internet browser to confirm results and complete onboarding

MAIN TAKE AWAY:
Clients DO NOT want to read. Reduce the text or add more images.

Impact

Simplified Onboarding

Invest in a web based browser, reducing onboarding steps from 5 to 2

Reduced Customer Success Calls

Customer Success calls related to onboarding went from an average of 44 minutes down to 15 minutes

Improve Appointment Completion

Providers & Patients completed appointment rates improved by 35%

Next Steps

Continue to simplify onboarding process

Users have the most trouble with understanding how to test their equipment, which became the new top reason why users were calling in. Finding new ways to simplify the process even further (ie. via mobile) is most important.

Improve clarity on how to seek help

Users were often stuck with what to do when they needed help. Highlight support when necessary to reduce drop off. Efforts were starting on how to highlight tech support chat in this situation.

Learnings

Never guide a user

No matter how frustrating, do not jump in and guide a user on how to perform an action.

The solution might surprise you

I had proposed solutions that were ultimately focused on the onboarding specifically, but didn't think about Web-based. That's why it's always good to share!

Involve everyone

Having Customer Success & Sales help me with preliminary research accelerated the recruitment process.

Case 2: US Insurance

Context

Breaking into the US market

Impact

1. US Healthcare Providers
2. OnCall

Timeline: 1 months for Generative Research

Why?

OnCall wanted to gain traction into the US market but was unsure how.

We needed to understand what the problems in virtual health were on the American side, and how we could be a part of solution.

Research Statement

We want to understand what the most pressing pain-point is for American healthcare providers in their workflow.

My Role

Product Manager

- Conduct user interviews
- Understand workflow of US healthcare providers
- Understand painpoints
- Synthesize information and share with team in order to select a problem to work on

Collaboration

- Collaborate with CEO, Sales, Marketing & Customer Success on feedback and business value
- Conduct User Interviews with UX Designer & Engineer to understand work flows
- Share findings and proposal with stakeholders

Questions

What does your patient workflow look like?

What is the patient journey from the moment they call in, to the moment their appointment is complete?

Who is involved with the patient journey?

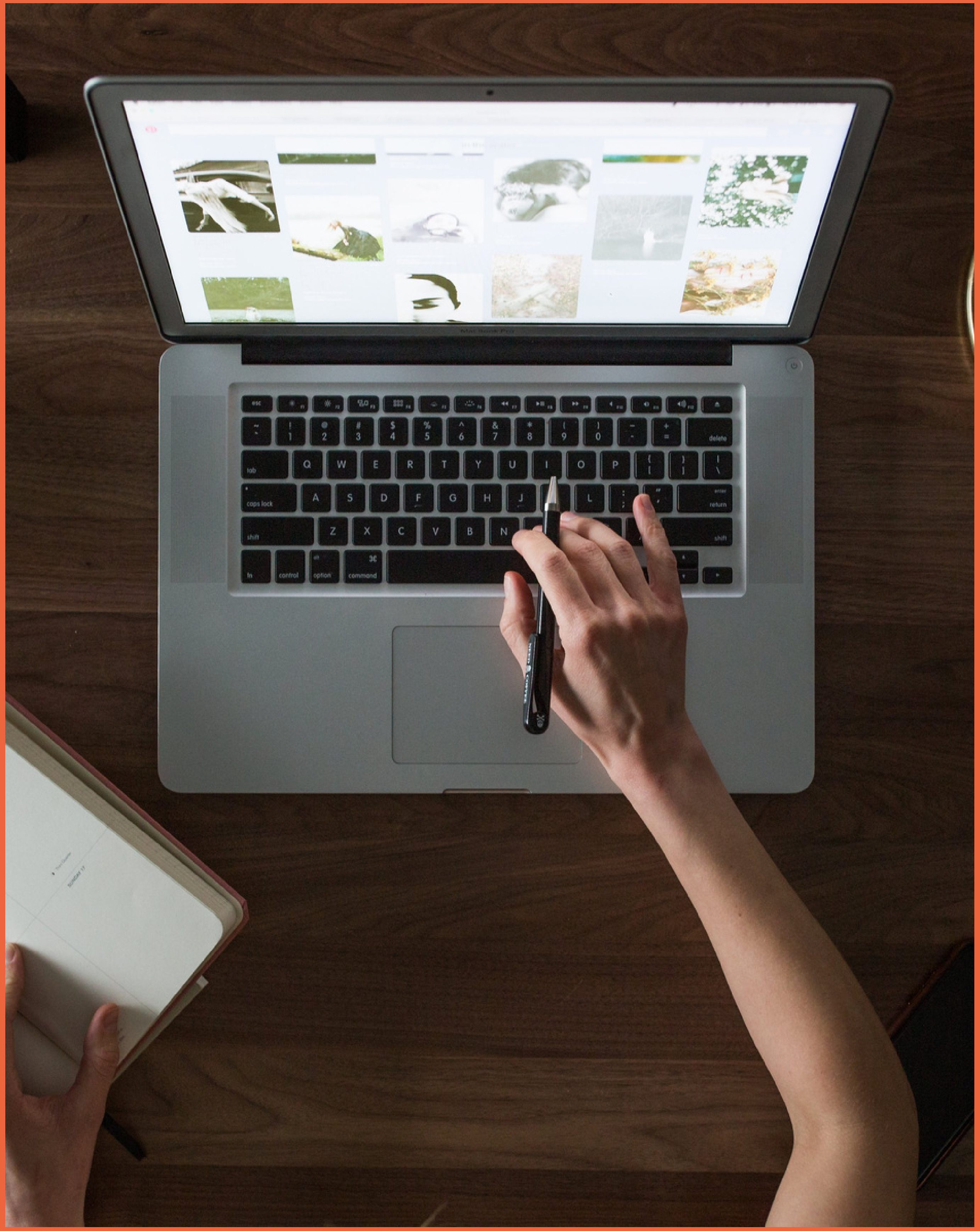
Who are the stakeholders involved beyond the physician?

What are the things happening parallel to the patient journey?

Does the patient care also involve insurance, billing, outsider services that need to be done adjacent to the care?

Goals

- Understand American provider-patient journey
- Learn about who is involved in the process from beginning to end
- Understand what pain points and frustrations occur during the patient journey
- Gather research about the different processes that are involved with patient intake



Timeline: 1.5 Months

Recruitment

2 Weeks

- Recruit 5 existing healthcare providers and 5 new healthcare providers
- 5 Existing providers from Customer Success
- 5 New providers sourced from Sales
- $100 Gift Card/Free Month

Interviews

2 Weeks

- User Interviews conducted over Google Meet
- Research being done in parallel

Synthesize

2 Weeks

- Analyze and synthesize user interviews & research
- Results presented at stakeholder meeting

Methodologies

User Interviews
Informational Research

User Interview

Lead by Helen
Collaboration with UX Designer
Duration: 1 Hour
Conducted over Google Meets

5 Existing US Healthcare Providers
5 New US Healthcare Providers

1. What does your day to day look like?
2. What happens when a patient calls in to book an appointment?
3. Who is responsible for booking the appointment?
4. What information do you ask for?
5. What happens during the appointment?
6. What information do you need at the end of your appointment?
7. What happens after the appointment?

Informational Research

Lead by Helen
Collaboration with UX Designer

Based off of the information our users would provide us, we would conduct deeper research with their resources on American Insurance, Direct Billing, Billing Laws, State Laws, Codes and much more..

Answers

What does your patient workflow look like?

Verifying patient eligibility, collecting direct billing info from insurance company and accepting the patient..

Who is involved with the patient journey?

Administrators, billers, insurance verification teams..

What are the things happening parallel to the patient journey?

Contacting insurance companies and billers, Medicare..

Stages	Patient	Biller	Provider
1. New patient	Requests an appointment	Asks for insurance ID	
2. Validating appointment request	Provides insurance ID Demographic Info: - Age - Name - DOB - Address - Social Security #	Logs into Insurance Portal to verify coverage (deductible), or calls	
3. Contacting insurance		Insurance company verifies deductible and co-pay amount. - Coverage – whether the patient has valid coverage on the date of service - Benefit options – patient responsibility for copays and coinsurance - Prior authorization requirements – confirming authorization for treatment from appropriate sources, if applicable	
		IF PATIENT IS NOT ELIGIBLE - it is up to the discretion of the provider how to move forward. Provider may charge patient upfront cost, or deny patient.	
		If patient is eligible, Informs patient of the "Account Balance" (determined by the insurance company) for the specific service	
4. Accepting Appointment		Patient is confirmed for their appointment.	
5. Appointment			Sees patient. Provides diagnosis.

Pain Points

Insurance Verification

Admins / Billers have to call multiple insurance companies at a time in order to verify if patient is eligible.

Billing Management

Admins / Billers have to coordinate with different insurance companies what is eligible for payment, co-payments and much more.

Getting Paid

Different codes and forms for different insurances and services provided, having to ensure that they will be paid directly.

Proposal

Presented to Stakeholders via Slidedeck

The workflow was presented to the Stakeholder team so they had a deep understanding of how the workflow process worked, and why we identified Insurance Verification as being the first step in breaking into the US.

We proposed the part of the workflow we believed could provide the most value, in order to gain buy in from Stakeholders.
Participants included: CEO, Sales, Customer Success, Marketing, Design & Engineering

MVP: Insurance Verification

This took the most upfront time for a provider, and there was no one tool that billers used. Billers were spending hours on the phone trying to coordinate with different insurances, and if they were missing information, they'd have to call again later.

Impact

Increase US Activation

One Enterprise Client (100 providers) who was not using OnCall due to the limitations were now using OnCall daily to verify patient verification successfully with over 50 checks per day

Establish User Research

First major project to be created through user research and to successfully launch with beta testers

Establish Prototype Testing

Created a comprehensive feature that was thoroughly tested before design, saving time for engineering fix

Next Steps

Create an insurance verification tool

An MVP was built out in a span of 6 months, with continuous prototype testing with the providers we had spoken with. Upon it's release, we turned on the feature for those 10 users that we had initially spoke with.

Continue testing and understanding what the feature lacks and how we can continuously improve

We built a feature that solved only a part of the workflow, and we wanted to understand how it reduced the time billers spent on the phone and how it fit into the rest of their workflow. Our next steps would be to look into billing as we improve the eligibility function.

Learnings

Always ask Why

Providers assumed that we understand the nuances of the acronyms and terms they were using. Once we dug a bit deeper, there was always some more information to uncover.

Understand who is involved

We assumed that only providers and admin were involved, but we learned there are whole billing teams, insurance verification teams and more.

Repeat the process

Asking 10 people for their workflows provided us with more confidence in our secondary research and gave us more information to start working on a prototype.

Thank you!