

Jobs to be done Research Case Study



How “feeling” the customer’s pains helped to shape
io Health’s home health documentation solution.

“ The Customer Progress Design method helped us uncover the unmet needs of our target customers, without being distracted by our own biases.

This approach helped us to ‘feel’ the customer’s pain, discover great new product ideas, and reprioritize our existing ideas.



David A. Bell, Ph. D.
Chairman and CEO of GrandCare
Health Services LLC

Content

- About Us
- Problem Statements & Objectives
- Research parameters, process, and tools
- Research results' impact on product development
- Experienced benefits of the method
- Time investment
- More information



About io Health

- California-based software startup
- Provides a workflow optimization platform designed for Home Health and Hospice organizations specializing in post-acute care
- Founded by David Bell, former CEO and now Chairman of GrandCare Health Services



About unipro solutions

- Germany-based strategy development consultancy
- Helps organizations accelerate growth
- Provides a customer-centric strategy method based on qualitative data
- Founded by Eckhart Boehme, mastermind behind The Wheel of Progress[®] canvas and developer of the Customer Progress Design[®] method

Problem Statements



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Home Health Provider

Home health documentation is complex and error-prone.

Legacy systems' process are burdensome and take critical time away core jobs.

io Health

Determine if there is value in an overlay system to address.

Convince stakeholders by creating evidence for the existence of the problem.

Objectives

Understand how to create more value in home health

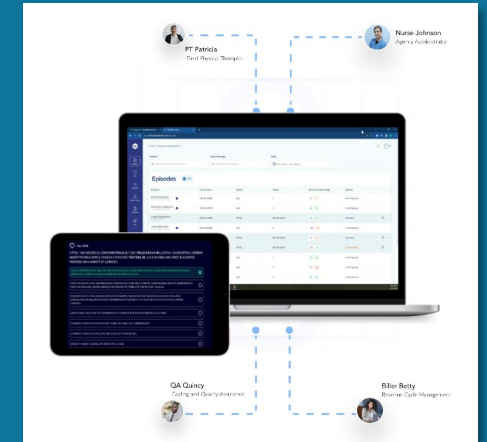
- Understand areas of dissatisfaction
- Realize opportunities

Understand the jobs-to-be-done involved

- Uncover functional, emotional, and social jobs

Create and launch an MVP

- Take MVP to the customer
- Create effective marketing strategy



Research Parameters



Customer
Interviews

4x



Healthcare
Agency
Managers

3x



Healthcare
Office Staff

3x



Clinicians
(RNs, PTs)

10 x 60 min remote interviews



Interview
Team

Interview lead, notes taker,
1-2 observers



Scheduling

4 days of interviewing

13.02.2024

Process Steps and Tools



STEP 1

Determine Project
Scope



STEP 2

Conduct Customer
Interviews



STEP 3

Generalize Interview
Data



STEP 4

Prioritize Customer
Jobs



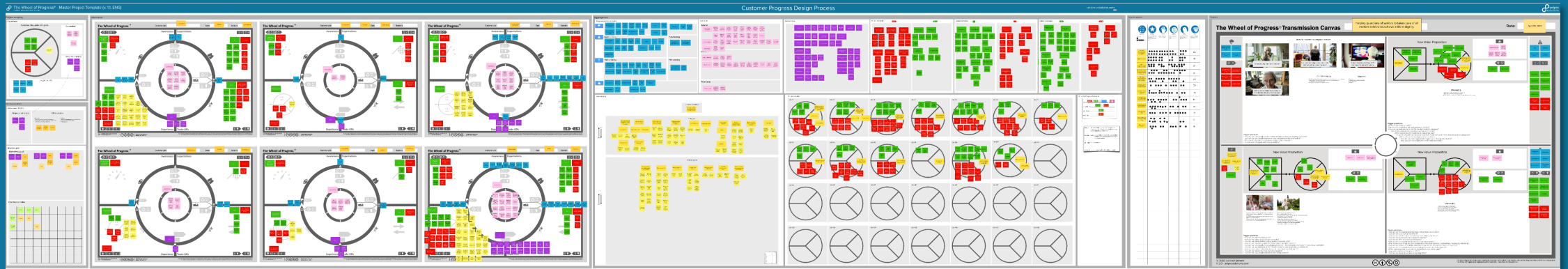
STEP 5

Develop Strategy Based
on Data

Process Steps and Tools



Project template



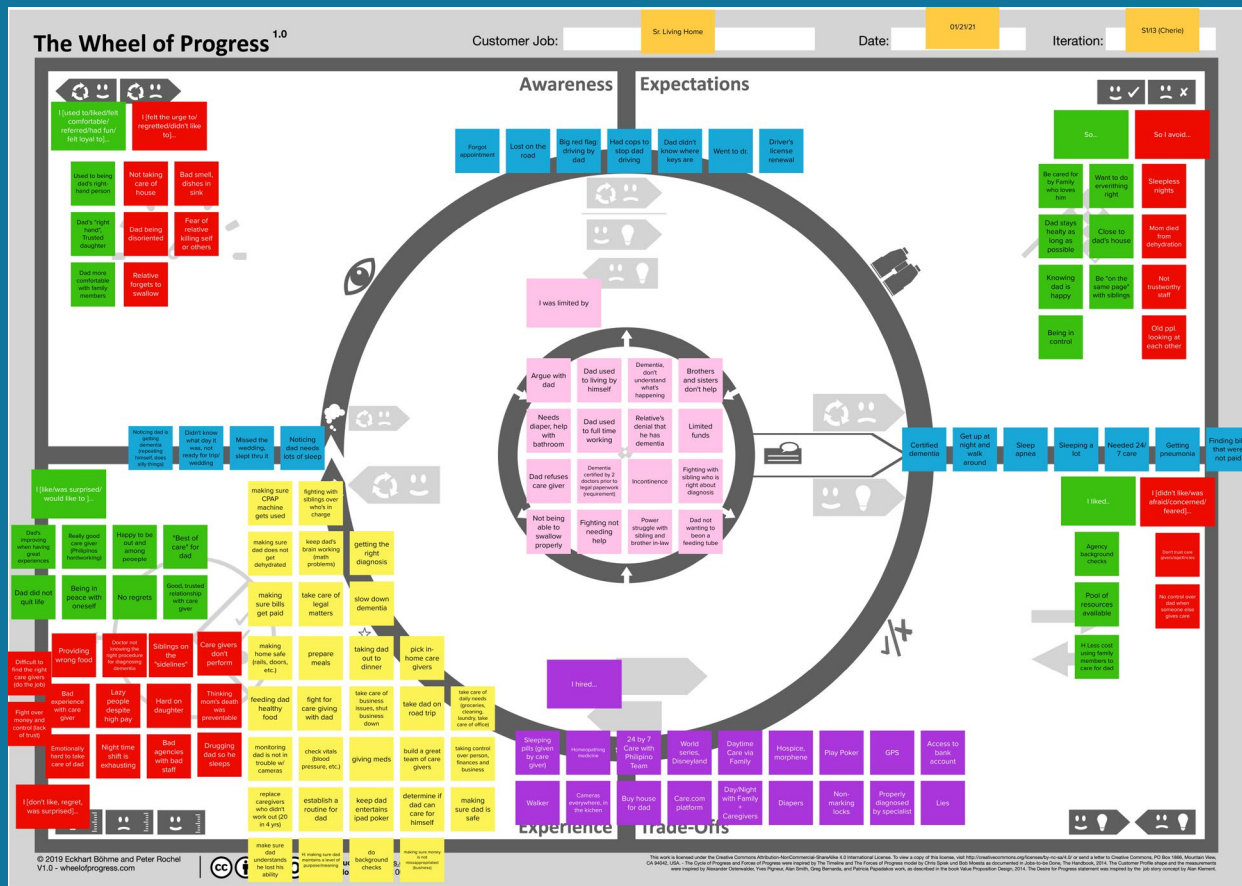
Purpose

- Covers tool set for all project steps
- Provides space for data capture and processing
- Provides visualization and fosters collaboration



Process Steps and Tools

The Wheel of Progress Canvas



Purpose

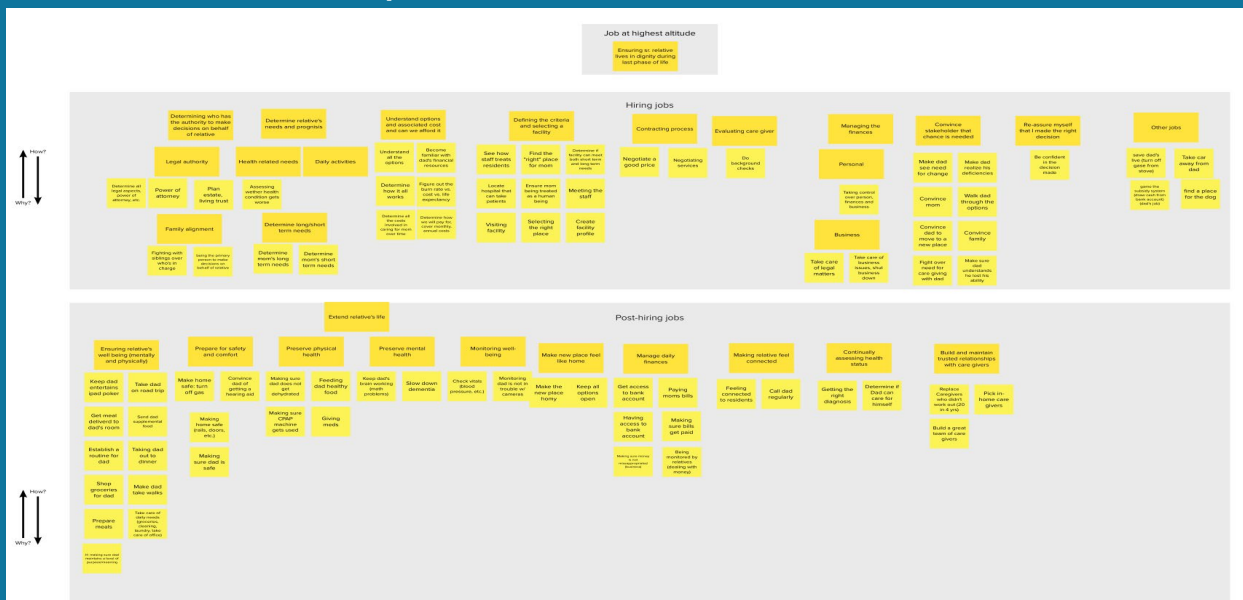
- Documenting interview data
- Structuring data into 12 variables
- Visualization of interview

For illustration purposes only



Process Steps and Tools

Customer Job Map



For illustration purposes only

Purpose

- Capture customer job hierarchy
- Depict process steps
- Derive overarching purpose

Process Steps and Tools

Customer Job Evaluation Matrix

Customer Jobs	Importance	Tangibility	Satisfaction	Lucrativity	Value
<p>Customer Jobs</p> <p>Scoring scale: ● (low) to ●●●●● (high)</p>	<p>Importance</p> <p>Does failing the job lead to extreme pains? Does failing the job lead to missing out on essential gains?</p>	<p>Tangibility</p> <p>Can you feel the pain? Can you see the gain?</p>	<p>Satisfaction</p> <p>Are there unresolved pains? Are there unrealized gains?</p>	<p>Lucrativity</p> <p>Are there many with this job, pain, or gain? Are there few willing to pay a lot?</p>	<p>Value</p> <p>Focus on the highest value jobs and related pains and gains.</p>
Determining individuals health care needs and prognosis	●●●●● ●●●●●	●●●●● ●●●●●	●●● ●●●●	●●●● ●●●	25
Extend relative's life	●●●●● ●●●●●	●●● ●●●	● ●●	●●●● ●●●	21
Ensure loved one continues to get quality care	●●●● ●●●●	●●● ●●●	●●●●● ●●●●	●●●● ●●●●	21
Determining who has the authority to make decisions on behalf of relative	●●●● ●●●●	●●●● ●●●●	●●●● ●●●●	●●●● ●	21

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Purpose

- Determine the most valuable customer job(s)
- Apply decision objective criteria
- Allow different stakeholders to contribute



Process Steps and Tools

Strategy Canvas

The screenshot displays 'The Wheel of Progress® Transmission Canvas' for the purpose of 'Helping guardians of seniors to take care of all matters related to achieving a life in dignity'. The tool is dated April 28, 2021. It features a central wheel diagram with segments for 'New Value Proposition', 'Core Messaging', and 'Channels'. The canvas is divided into four quadrants, each containing a 'New Value Proposition' wheel and 'Trigger questions' for strategic development. The interface includes various icons and a sidebar with additional tools and resources.

Purpose

- Ideate product, marketing, and sales strategy
- Use customer research data as input for strategy development
- Align teams on a common purpose
- Visualize strategy and foster collaboration

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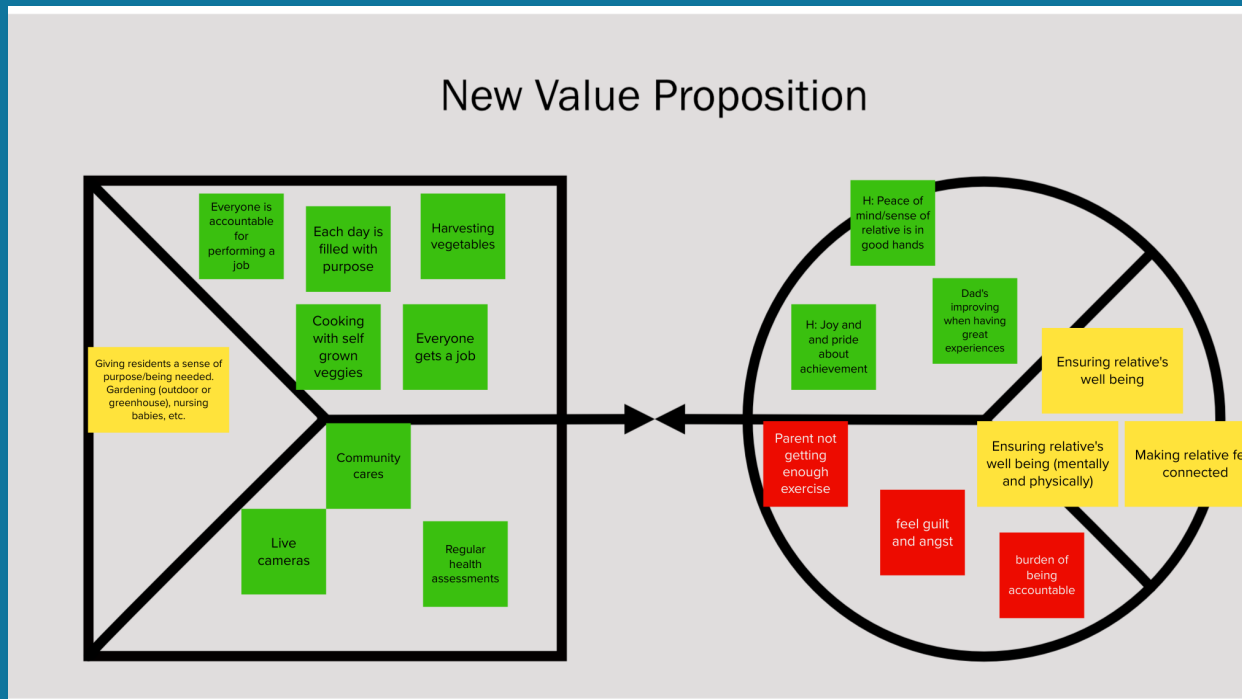


STEP 5

Develop Strategy Based on Data

Process Steps and Tools

Customer Profile and Value Map



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Purpose

- Capture customer jobs with associated pains & gains
- Map solutions to customer jobs

Results – Elements discovered

10 interviews	Cust. Jobs	Pains	Gains	Trigger Events	Con-straints	Solutions	Habits	Pushes	Desired outcomes	Avoi-dances	Pulls	Anxieties
Elements (851)	255	115	39	35	140	125	4	6	96	25	10	3
Cluster	45	9	13	14	40	10	4	4	9	9	8	3

Key-findings

- High complexity of job-tasks
- High number of constraints
- Pains are condensed into 9 areas
- Clients want improvements in 9 areas

Conclusions

- Large number of constraints makes a seamless “overlay” solution the most viable option
- Build specific features in overlay that make documentation faster and more accurate

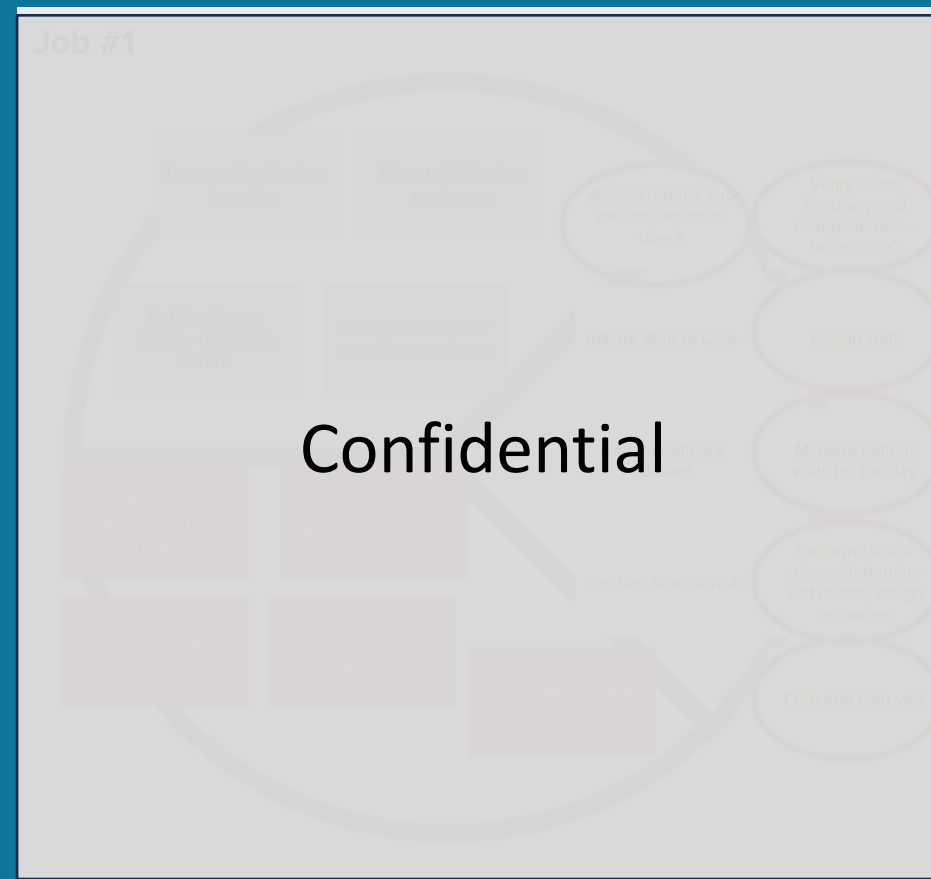
Results - Top Ranked Customer Jobs-To-Be-Done

Rank	Customer Jobs	Total Value						
1	<table border="1"> <tr> <td>Perform initial visit, go through questionnaire with patient</td> <td>Benchmark processes vs Best practice</td> <td>Prepare and send documentation to office</td> <td>Approve documentation notes</td> <td>Document patient progress notes</td> <td>Monitor organizational performance</td> </tr> </table>	Perform initial visit, go through questionnaire with patient	Benchmark processes vs Best practice	Prepare and send documentation to office	Approve documentation notes	Document patient progress notes	Monitor organizational performance	32
Perform initial visit, go through questionnaire with patient	Benchmark processes vs Best practice	Prepare and send documentation to office	Approve documentation notes	Document patient progress notes	Monitor organizational performance			
2	<table border="1"> <tr> <td>Resolve issues with clinical documentation</td> <td>Claims/data exchange with payers</td> <td colspan="4" style="text-align: center;">Confidential</td> </tr> </table>	Resolve issues with clinical documentation	Claims/data exchange with payers	Confidential				31
Resolve issues with clinical documentation	Claims/data exchange with payers	Confidential						
3	<table border="1"> <tr> <td>Assign and schedule staff</td> <td>Provide booklet for patient</td> <td>Monitor patient's status & keep MD informed</td> <td>Train staff on software and reports</td> <td colspan="2"></td> </tr> </table>	Assign and schedule staff	Provide booklet for patient	Monitor patient's status & keep MD informed	Train staff on software and reports			30
Assign and schedule staff	Provide booklet for patient	Monitor patient's status & keep MD informed	Train staff on software and reports					

*Score is based on team's assessment. Criteria applied: importance, tangibility, satisfaction, lucratively. Scale from 8 (lowest) to 32 (highest).

Clinicians	Managers	Office Staff
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Opportunities: Job Clusters with associated pains and gains

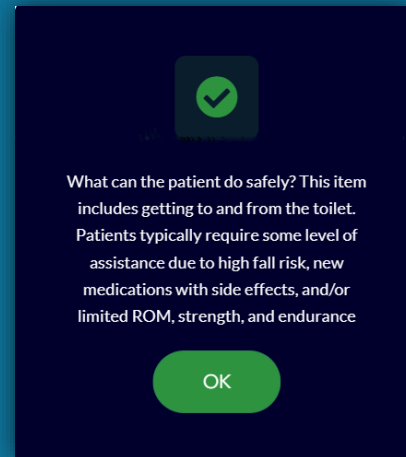


Outcomes

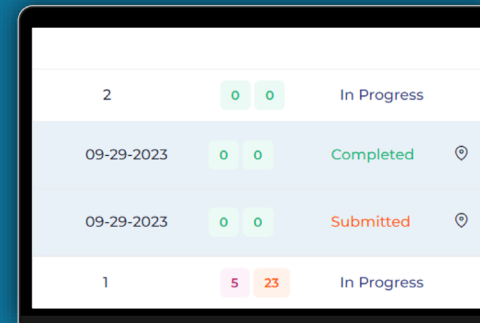
- Accelerated time to robust MVP - ability to quickly identify and prioritize all pain points
- Confidently select technology that would be most quickly adopted given all constraints
- Ability to use customer research data to inform robust and comprehensive product roadmap
- Seamless adoption due to overlay technology



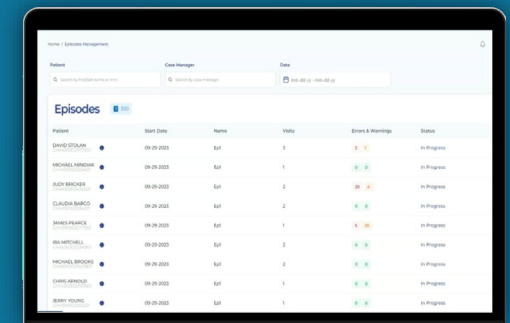
Accuracy Simplified
Easier, more accurate clinical documentation



Real-time Clinician Education
Real-time clinician help and Education to speed onboarding.



Accelerating Coding, QA & Billing
Speed The Revenue Cycle by making Coding, QA & Billing faster



High ROI
Our Customers are realizing higher revenue

Experienced Benefits

Research provided the foundation and confidence to drill down.

Research results were easy to understand.

Results were used to efficiently inform MVP for team members previously not involved in the process.

Minimal need for validation research due to comprehensive understanding of the problem space.

Project required less than 20 hours of time investment.

All data was visualized and in one place.

io Health' time investment in research project

Kick-off	2.50 h
Interview observations	10.00 h
Data review and prioritization	2.00 h
Strategy ideation	3.00 h
Total	17.50 h

More information

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About io Health

- California-based software startup
- Aims at transforming operational efficiency, improving patient care, and boosting clinician satisfaction
- Provides a workflow optimization platform
- Designed for Home Health and Hospice organizations specializing in post-acute care
- Technology can be applied to any setting using legacy systems and with high paperwork burden
- Founded by David Bell, former CEO and now Chairman of GrandCare Health Services



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