

Jobs to be done Research Case Study



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

Content

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



About io Health

- CA-based software startup
- Aims at transforming operational efficiency, improve patient care, and boosting clinician satisfaction
- 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 revolutionary customer-centric strategy method based on qualitative data
- Founded by Eckhart Böhme, mastermind of The Wheel of Progress canvas and developer of the Customer Progress Design method

Problem Statements

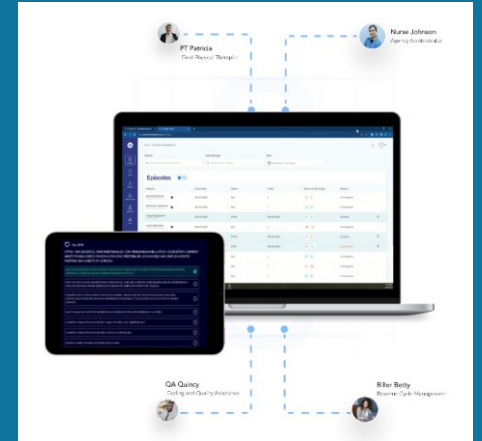


Picture by unknown author is licensed according to [CC BY](#)

- Home care documentation is complex and error-prone.
- Legacy systems' process is a burden and takes time away from clinicians' and administrators' core jobs.
- Lack of primary research data on the greatest functional opportunities for an io Health-developed “overlay system”.
- Convince stakeholders by creating evidence for the existence of the problem.

Objectives

- Understand how to create more value in the home health field
 - understand areas of dissatisfaction
 - realize opportunities
- Uncover functional, emotional, and social jobs-to-be-done
- Create an MVP and take it 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

4/18/2023

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



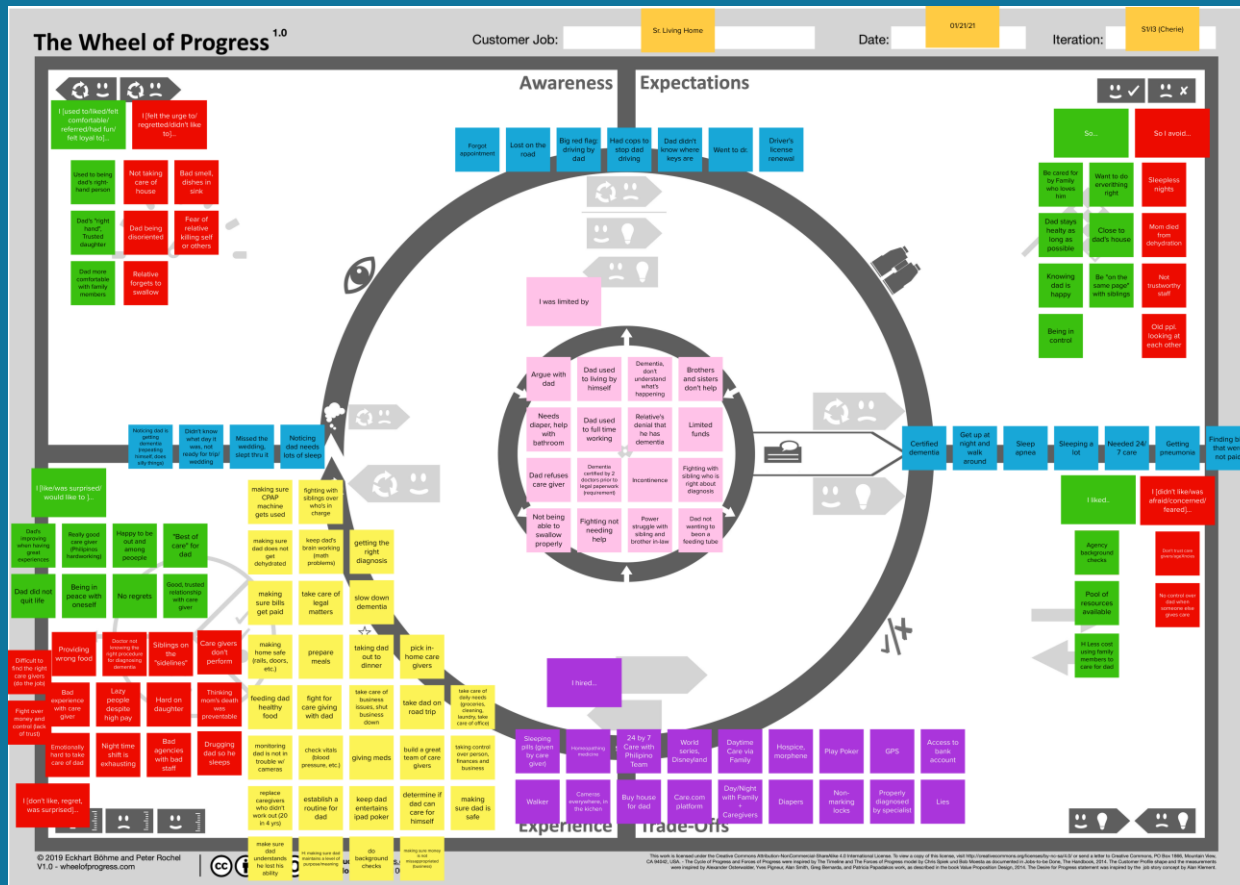
Purpose

- 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

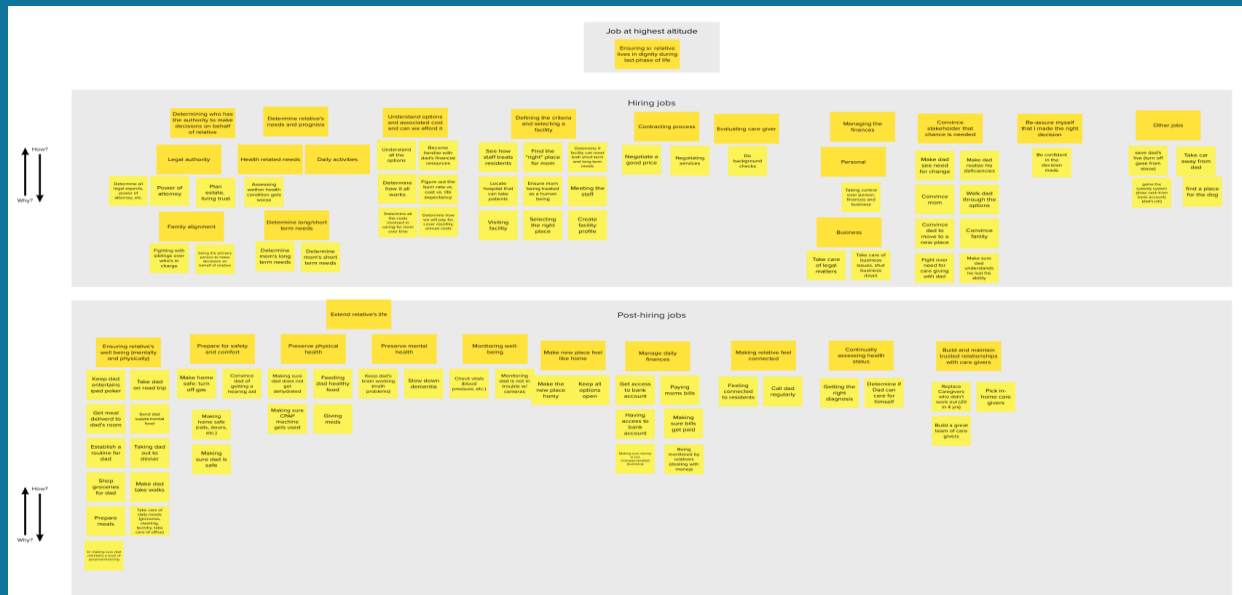
- Documenting interview data
- Structuring data into 12 variables
- Visualization of interview

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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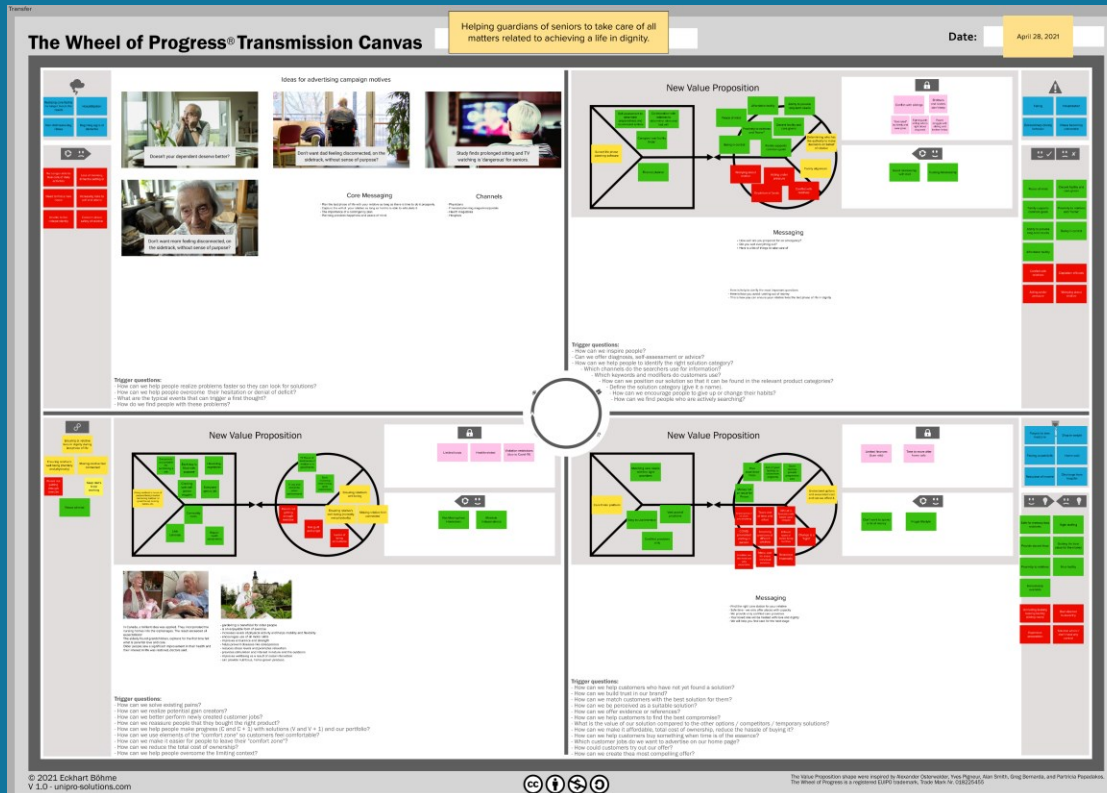
Purpose

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



Process Steps and Tools

Strategy Canvas



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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

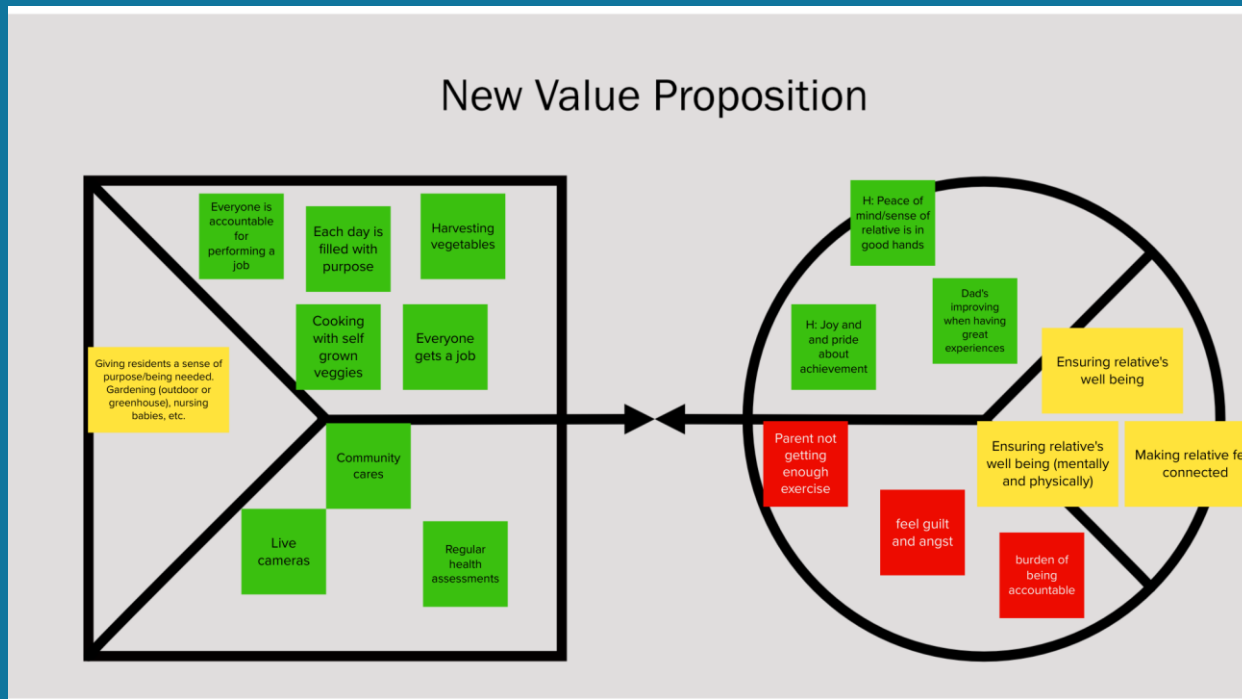


STEP 5

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 look for improvements in 9 areas

Conclusions

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

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

Rank	Customer Jobs	Total Value
1	<div style="display: flex; justify-content: space-between;"> <div style="width: 15%;">Perform initial visit, go through questionnaire with patient</div> <div style="width: 15%;">Benchmark processes vs Best practice</div> <div style="width: 15%;">Prepare and send documentation to office</div> <div style="width: 15%;">Approve documentation notes</div> <div style="width: 15%;">Document patient progress notes</div> <div style="width: 15%;">Monitor organizational performance</div> </div>	32
2	<div style="display: flex; justify-content: space-between;"> <div style="width: 15%;">Resolve issues with clinical documentation</div> <div style="width: 15%;">Claims/data exchange with payers</div> <div style="width: 60%; text-align: center;">Confidential</div> </div>	31
3	<div style="display: flex; justify-content: space-between;"> <div style="width: 15%;">Assign and schedule staff</div> <div style="width: 15%;">Provide booklet for patient</div> <div style="width: 15%;">Monitor patient's status & keep MD informed</div> <div style="width: 15%;">Train staff on software and reports</div> </div>	30

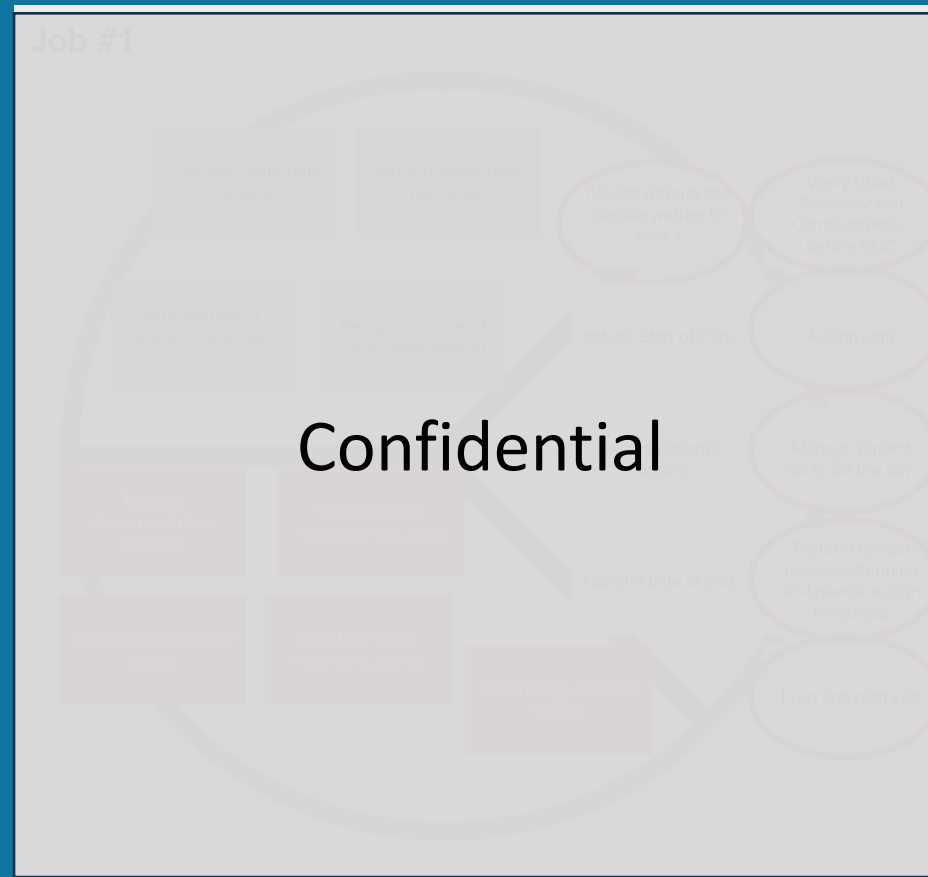
*Score is based on team's assessment. Criteria applied: importance, tangibility, satisfaction, lucratively. Scale from 8 (lowest) to 32 (highest).

Clinicians

Managers

Office Staff

Opportunities: Job Clusters with associated pains and gains



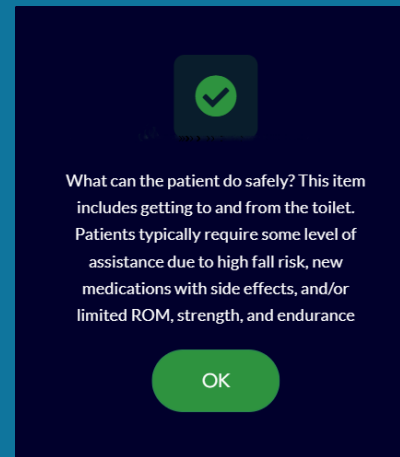
Outcomes

- Accelerated time to MVP - ability to quickly identify all pain points
- Confidently determine a technology that would be most quickly adopted given all constraints
- Ability to use all of the customer research data to inform product roadmap
- Seamless adoption due to overlay technology



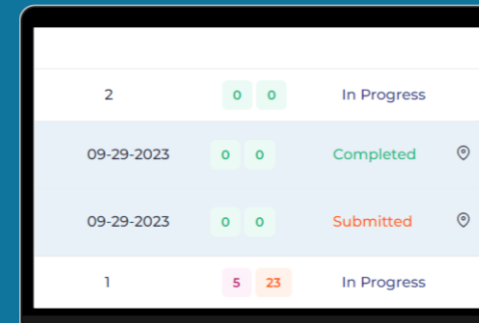
Accuracy Simplified

Easier, more accurate clinical documentation



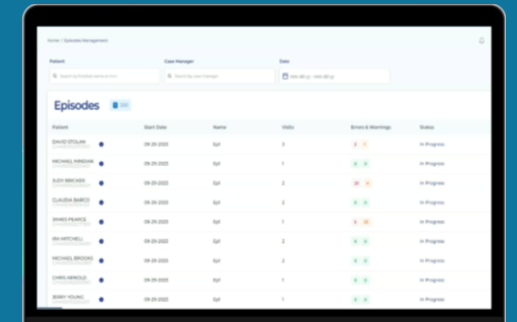
Real-time Clinician Education

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 of the method

1. Research provided the foundation and confidence to drill down.
2. Research results were easy to understand for people previously not involved in the process.
3. Not much validation research needed due to a solid understanding of the problem space.
4. All data was visualized and in one place.
5. Project required minimal time investment.

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

Achievements

David Bell of io Health Recognized as 2023 Innovator in Healthcare

David Bell, Ph.D., founder and CEO of io Health, was honored at the 26th Innovations in Healthcare Awards Event.

io Health was recognized as a Healthcare Industry Leader and Innovator focused on reducing the cost of providing access to quality care.

"We are honored to be recognized for the impact our innovative technology provides to help Home Health and Hospice businesses reduce costs, optimize workflows, and identify new revenue opportunities amidst challenging profit margins," said David Bell.

"By connecting clinicians in the field to properly complete documentation and reduce administrative burden – we can give them more time to focus on what matters most, the patient."

White paper, showcasing io Health's io Assist AI-enabled charting tool reducing cost by 5.1% and increasing revenue by 9.1%.

WHITE PAPER io health

Point-of-care Optimization Software Drives Home Health Documentation Costs Down 5.1% and Revenue up 9.1%

David Bell, Ph.D. and Tiffany Shubert, Ph.D., PT, May 8, 2024

EXECUTIVE SUMMARY: io Assist, a Point of Care (POS) OASIS documentation and virtual education tool was implemented over a four-month period in three Home Health agencies. We compared performance during the study period to the prior year baseline and found significant improvements in accuracy and efficiency:

- Functional scores increased 7.8 points (+/- 1.9) for SOCs submitted by clinicians using io Assist.
- Score changes led to a 9.1% (\$243) higher revenue per episode.
- Visit plus documentation time decreased by 5.1% (5.7 minutes) +/- 2.6%.
- Clinicians satisfaction was neutral to positive.
- Results show a significant and continuing trend.

BACKGROUND
The home health industry faces heavy documentation requirements and needs faster point of care data entry with better data accuracy.

OASIS is a standardized data set required by the Centers for Medicare and Medicaid Services (CMS) for every covered home health patient. Hundreds of data points are collected for each patient, including their degree of independence in activities of daily living, diagnoses, medications, and demographics.

Home health agencies send this data to CMS, where it is used to determine reimbursement, star ratings and value-based purchasing scores.

Providing accurate OASIS data is challenging due to the complexity and large number of questions. OASIS documentation time, not including patient-facing time, ranges from about 45 to 90 minutes per patient, depending on the complexity of the case. Current workflows to identify and correct any data entry errors are also time consuming as they require clinicians to fix errors after the fact based on feedback from the office.

PRODUCT
io Assist was developed by home health industry veterans to make OASIS data collection faster and more accurate while complying with CMS and state regulations. The product was designed to help clinicians practice at the top of their license by providing basic data validation and education in real time. io Assist uses information about the patient diagnoses and presentation to provide data validation in the context of their existing clinical workflow to minimize training time. For more information what io Assist is and how it works, see this [short demo](#).

io Assist software runs on Android tablets and is deployable via a Mobile Device Management (MDM) system.

STUDY METHOD
We tested io Assist at GrandCare Health Services in January

Functional Points at SOC

Month	Post-OA	From Clinician	Baseline
2023	~35	~20	~35
Jan	~38	~22	~35
Feb	~42	~24	~35
Mar	~45	~26	~35
Apr	~48	~28	~35

Change in \$\$ / Episode

Month	Change (%)
2023	0.0%
Jan	~4.0%
Feb	~1.0%
Mar	~8.0%
Apr	~10.0%

FOR MORE INFORMATION
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“ 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