



Memorial Sloan Kettering  
Cancer Center

# Design Thinking in the Service Platform

Jan 2022 / DIGITS DESIGN TEAM

# ITINERARY

Introductions

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Case Study: The International Center

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The Challenges

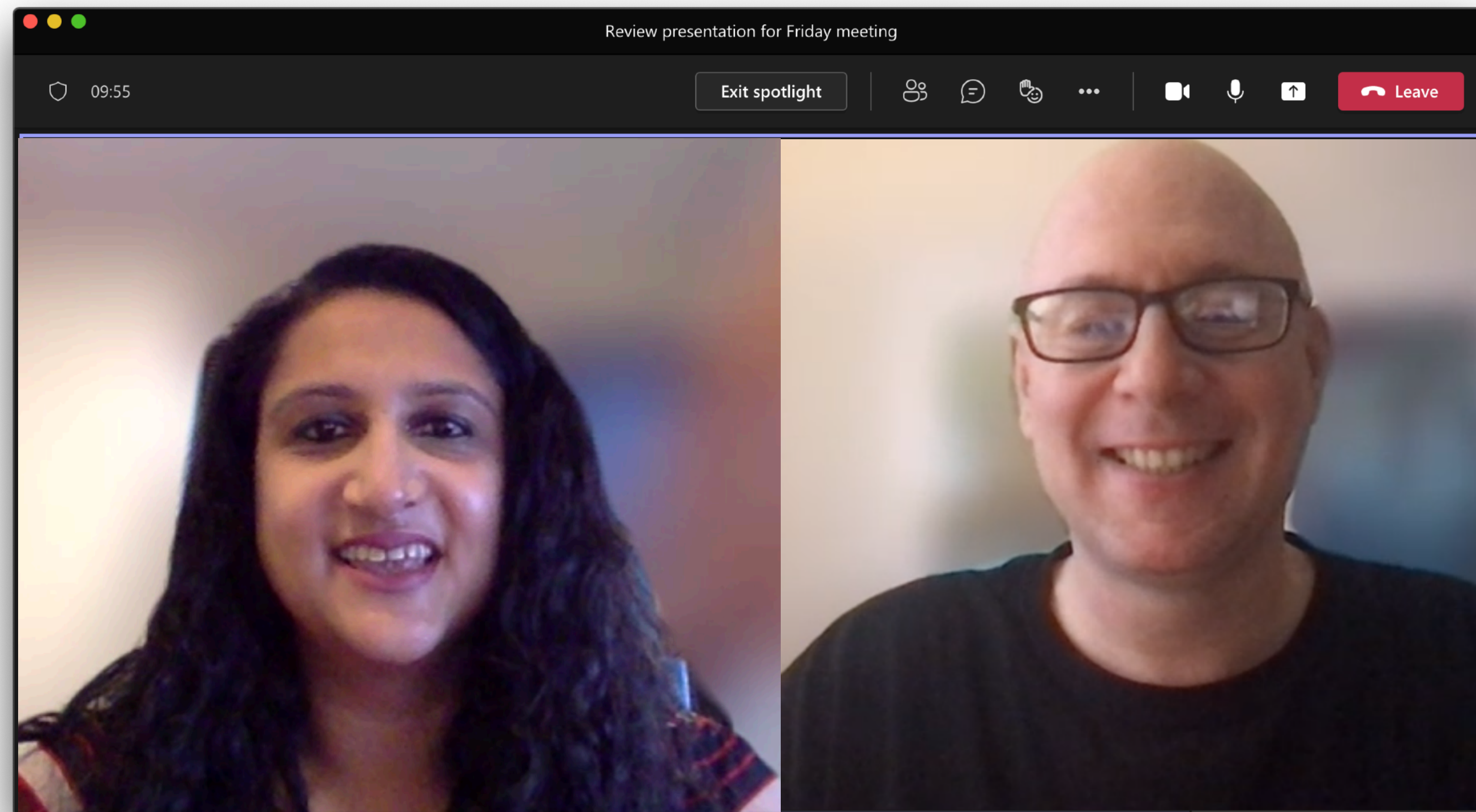
Closing Comments

# Introductions



# INTRODUCTIONS

Payal Patel  
Product Manager  
Service Platform



John Zavocki  
Product Designer  
Service Platform

## USER DATA AND TEAM COLLABORATION

The Service Platform is built on Salesforce using, as much as possible, “out of the box” solutions that are well supported and maintained through Salesforce robust “Health Cloud”.

However, design and development need to work together to find creative solutions – because implementing Salesforce in this way means that we can’t just build anything we want.

This means that design need to work closely with development because the software is far too restrictive and complicated.

What is Design Think?



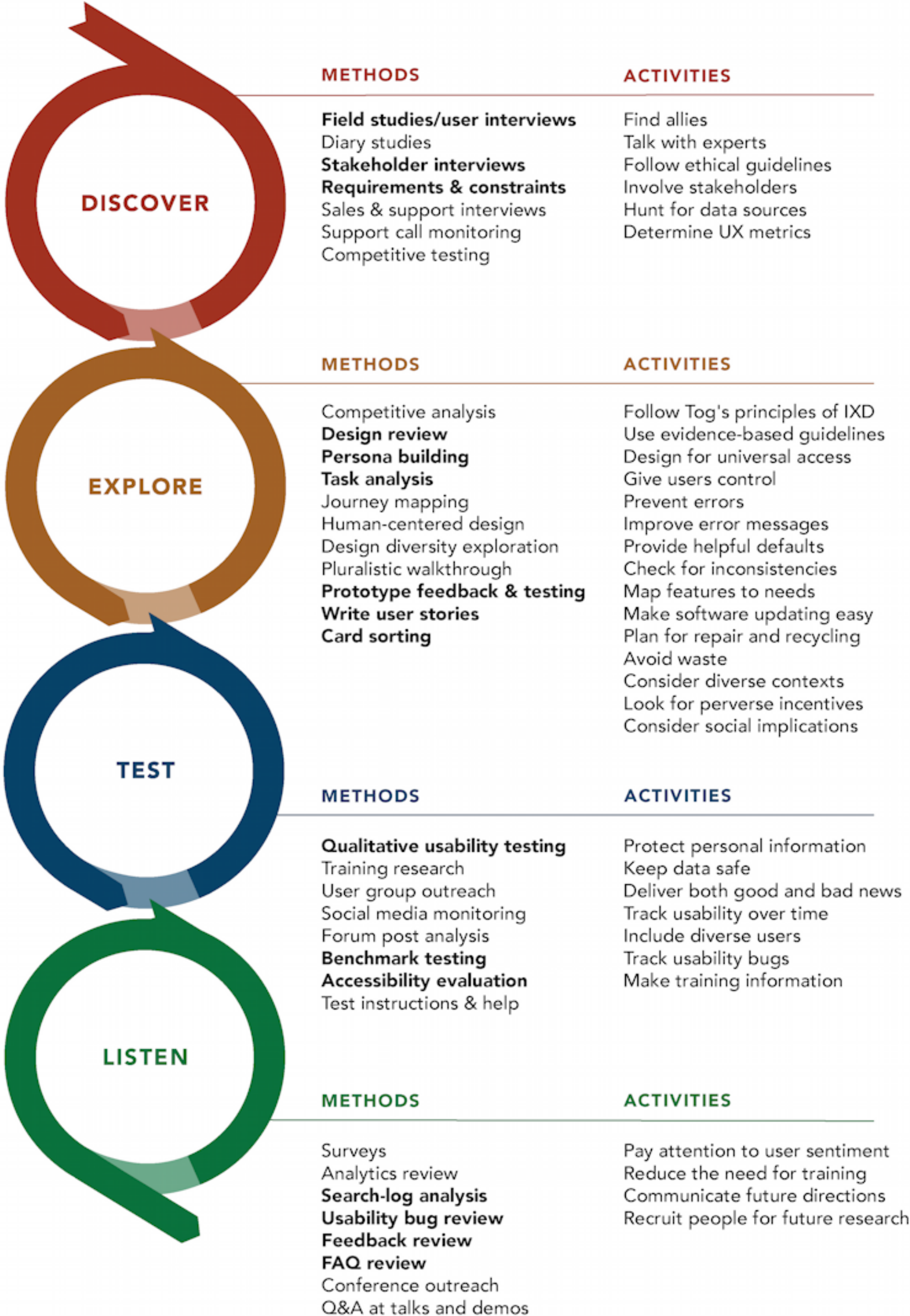
# WHAT IS DESIGN THINK?

*Design Think* is a tried and true process User Experience employs to design the right things in the right way.

Also, the method relies on observed data, team collaboration, and rapid iterations.

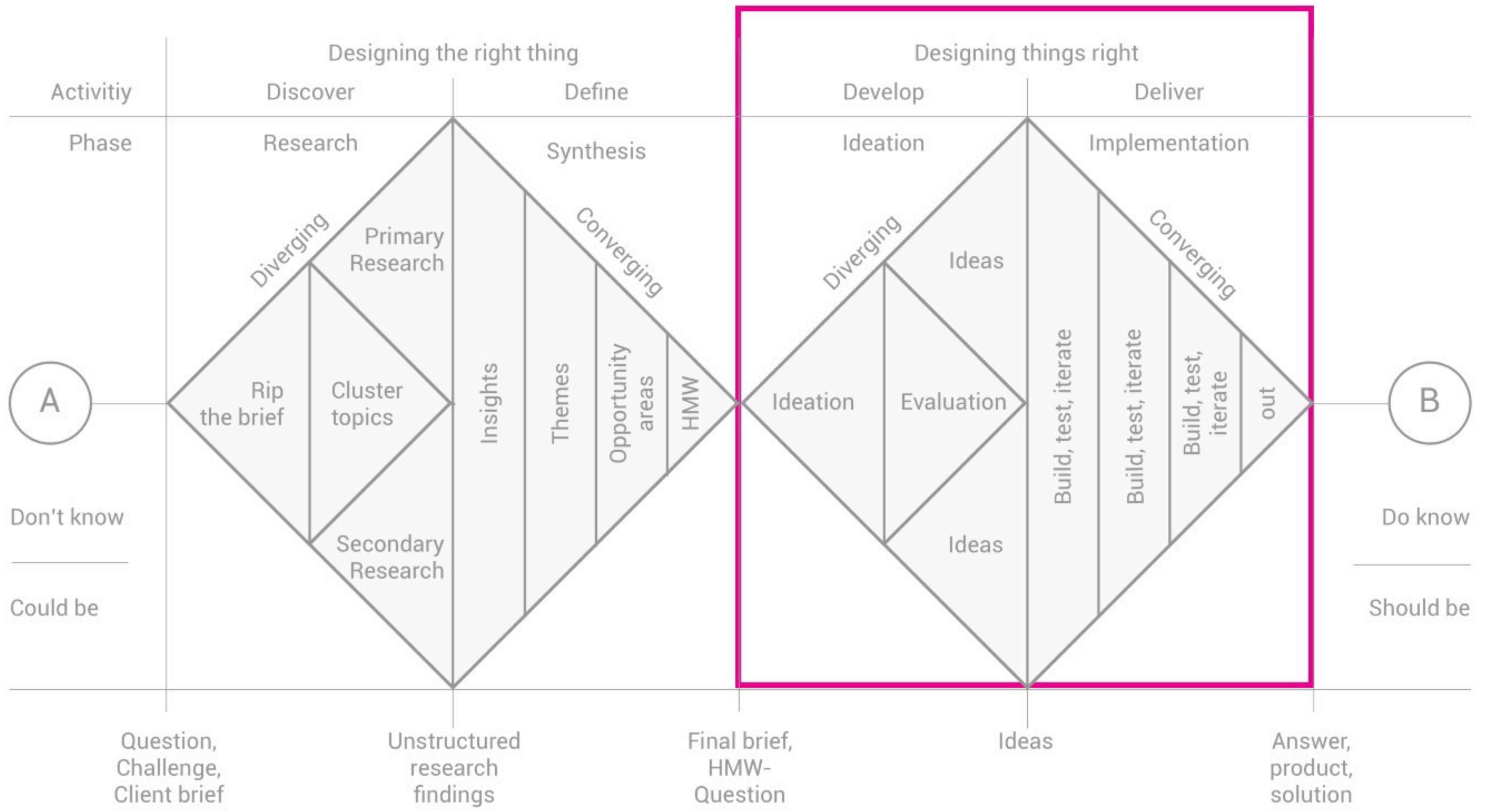
There are many different “flavors” of Design Think – but really they all focus on these four four moments ...

## UX ACTIVITIES IN THE PRODUCT & SERVICE DESIGN CYCLE



Bold methods are some of the most commonly used.

# THE RELIABLE DOUBLE-DIAMOND



# USER CENTRIC | DATA DRIVEN

The end-users, the individuals that will use the tools on a day-to-day basis, are our main focus.

We validate assumptions against their needs and wants. We observe their behavior, often witnessing failure, to understand their intention.

We listen to what they have crafted outside of the solution we have crafted for them – to understand functionality we didn't know they needed.

# Case Study: International Center



# CASE STUDY: INTERNATIONAL CENTER

Our international patients face a unique series of obstacles that make their first visit to MSK challenging:

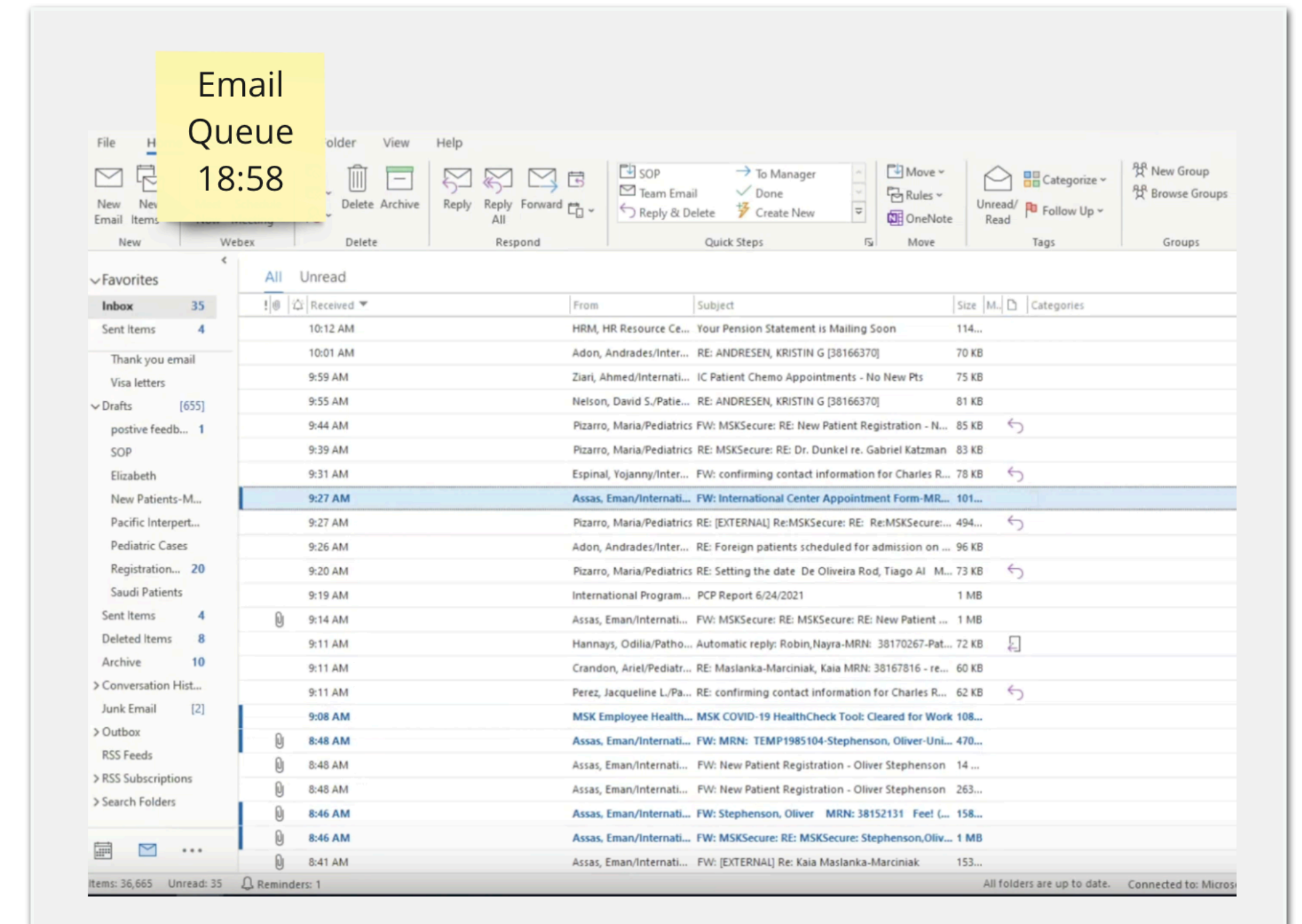
1. Translations
2. Visas
3. Navigating the US Healthcare system
4. Time delays - both in communication and document delivery

# CASE STUDY: INTERNATIONAL CENTER

Currently, the International Intake team uses

1. email to organize goals and tasks
2. while management uses Excel to keep track of patient status.

These ensure that each liaison has a radically different way of organizing the day. Also, weekly alignment meetings are necessary to assess real-time activity.



Screen shot of research recording showing how liaison uses \*read and \*unread message options to organize work

# Case Study: International Center

The Ask



## INTERNATIONAL INTAKE: THE ASK

Our task was to look into how Salesforce's Health Cloud could reduce alignment meetings in lieu of realtime- reporting dashboards while giving liaisons a unified structure to record activity and align on patient status.



# Case Study: International Center

## The Process

## INTERNATIONAL INTAKE: THE PROCESS

We decided to interview three members of the team to understand the full scope of the work they had done. We simply listened to them communicate what they did and they drew maps of their journey's.

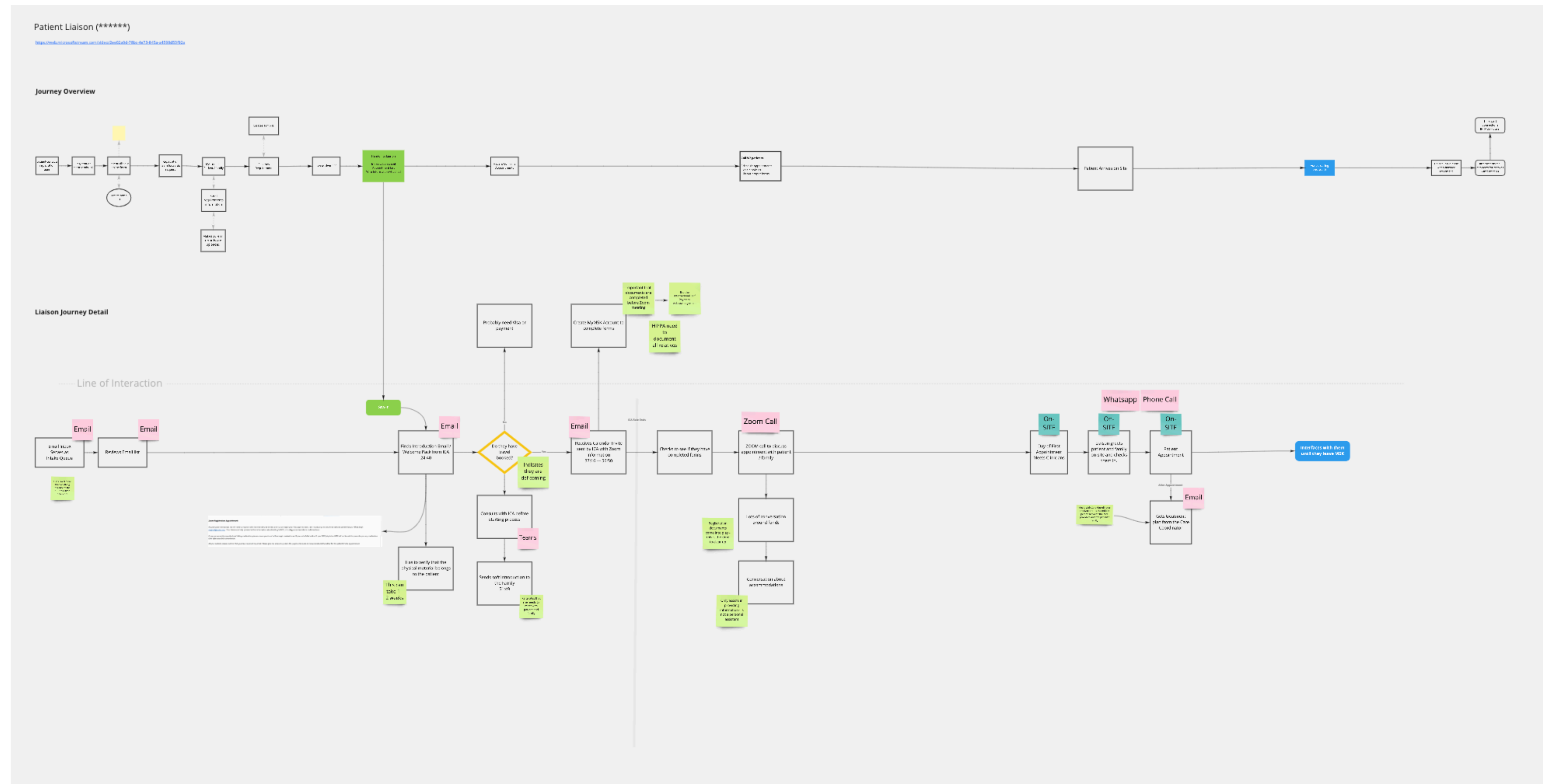
They were all radically different:





# INTERNATIONAL INTAKE: THE PROCESS

They were all radically different:



# INTERNATIONAL INTAKE: THE PROCESS

We recorded the interviews, let DoveTails translate them, searched for common topics, and let the data tell us what was most important!



The screenshot shows a software interface with a top navigation bar containing 'Home', 'Explore', and 'Recent'. Below this is a sidebar with several icons. The main content area is titled 'Observations' and features two entries: 'Brandon Usability Test' with a video thumbnail and a '10+' note count, and 'Ruth Usability Test' with a video thumbnail and a '9' note count. Below each entry are sections for 'Notes' with colored indicators and counts (3 for Brandon, and an unlabeled count for Ruth). At the bottom, there are icons for a grid, a bell, and a gear.

# INTERNATIONAL INTAKE: THE PROCESS

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2021 Q4. International Center App 1.0

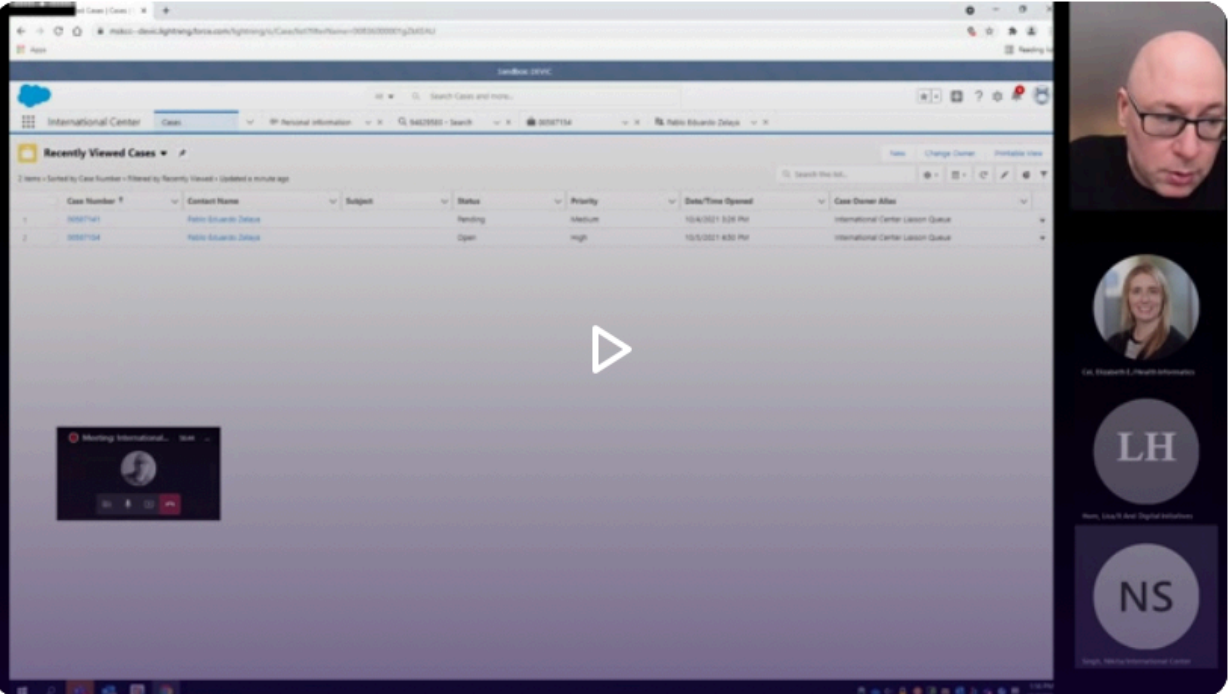
### Nikita : Notes

...ld be a tag as needed and make more visible like she suggested Closed vs completed ☹ mismatch. Page is too busy, I even had trouble spotting the drop down options Omg, "rage clicking" it is so real Changing patient name should be allowed at the top, not scroll down to edit. I had the same confusion from another experience when I needed to edit patient info in TRAIN WHOAA, where are the notes?!?! She just entered too. Also make new goal versus new task under template goals....? Revelation from JZ's explanation, about records already being available but had to vie...

**Opportunity 140**

8 Oct 2021

2021 Q4. International Center App 1.0



### Nikita Usability Test

...ople, you know, instinctively want to choose to do it. Right. Yeah. Is there, I know RMS has this feature where I'm not sure how, like how familiar you are with the RMS interface. I'm not at all. Okay. So just when you like, okay. So for example, when I logged into RMS right on the top right-hand I was kinda like, it looks like this is like a dropdown arrow. Most recently viewed patients of that I've looked into their account of, is that something possible in this system? Yes, it is very, very much so. Very much. So I think that if you go to cases, the blue tab and hit the arrow down to the right of it and hit accounts,

5 1 6 4 1 5 1 4 2 7 2 4 1

Comprehensible 4

ovetailapp.com/data/7j35Vu1S0dbWssxaEoVY4b#v=ewAiAGqAlqA6ACIAYqBmAGYAYQA3ADqANQAxAC0AYwAzAGMAZgAtADQAZQAwADQALQA5ADAAMABmAC0ANQBkADgAZQBjADUANQAxAGUAYwAwADkAlqB9AA

# INTERNATIONAL INTAKE: THE PROCESS

Stop relying on Excel for Activity Tracking

Translators need to be considered at almost every point of engagement

Make finding a patient effortless

Email templates are essential

travel clearance is a common blocker

regional collection of records is very challenging

medical records are not translated!

Time is the Enemy

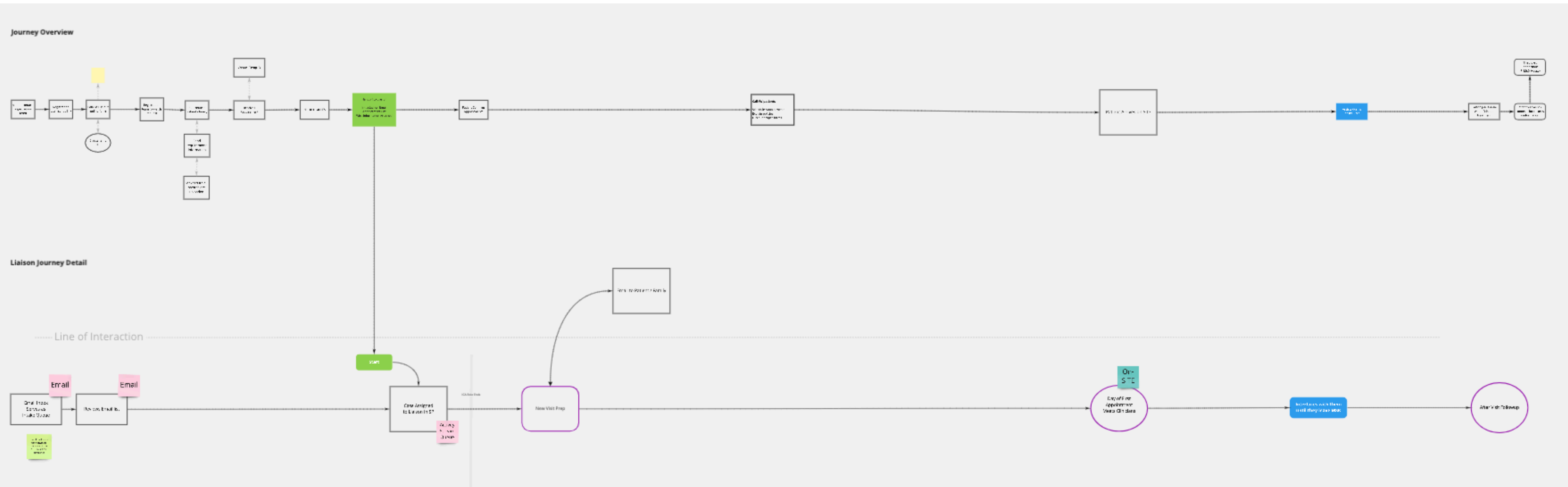
Get EVERYTHING done by the date of the first appointment - 24hrs before

Everything takes longer because of the timezones



# INTERNATIONAL INTAKE: THE PROCESS

From this Research we've optimized the Flow





# Case Study: International Center

## The Solution(s)

## INTERNATIONAL INTAKE: THE SOLUTION

At this point in the design process, we knew that **we wanted to start to collaborate with the development team.** The Service Platform has a commitment to try to do most things using “out of the box” solutions provided by the Salesforce Site Builders. However, these tools are deep and require extensive expertise that only the developers have.

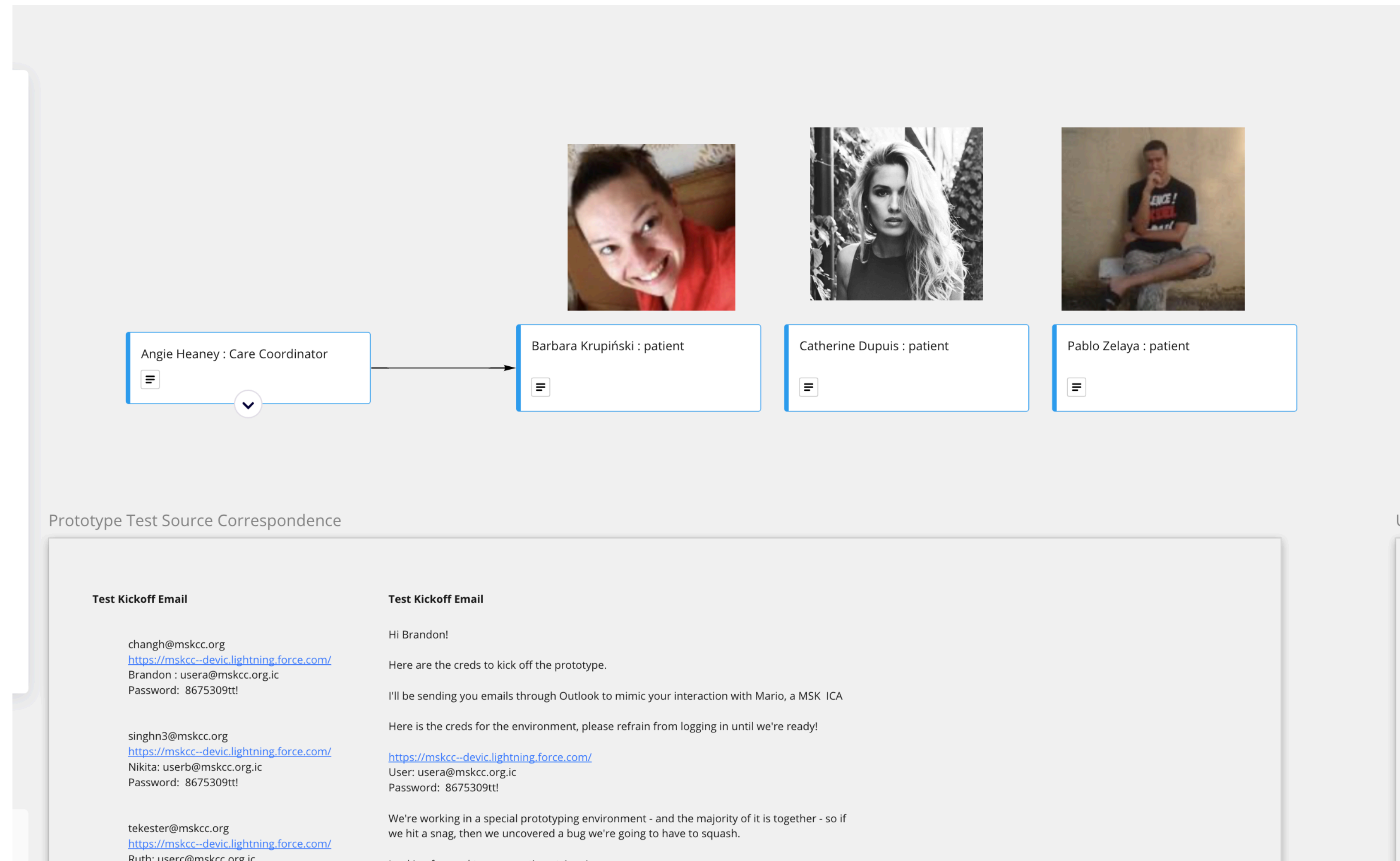
Our major shift was to move to disposable, Salesforce instances to do high fidelity prototyping for user testing.

This new way of working was radical - and took several attempts.



# INTERNATIONAL INTAKE: PLANNING THE TESTS

Persona accounts  
Fake information  
Fabricated story  
Hidden failures



We created a test plan and crafted fake emails to simulate the 3 critical portions of the intake process.

If we scored a high success rate – then we'd know that our solution was on the right vector ...

**Email #1: ICA Handoff**

From: Vitola, Mario A/ International Center

Sent: October 1, 2021 @2:40pm

To: changh@mskcc.org

CC:

Subject: New International patient 23094234

Hi,

I've entered a new patient in Service PlatformKrupinski, Barbara

Her MRN is 23094234

And Elizabeth set up a new case for you : 00587151

She needs to get set up in MyMSk - I'll CC you on the introductory email ...

Thanks

Mario

**Email #2: Patient Introduction Handoff Email**

From: Vitola, Mario A/ International Center

Sent: October 1, 2021 @2:40pm

To: Barbara\_Krupiski98@yahoo.com

... and we made sure to include a challenging error to see how the liaisons would handle it in the new system ...



**Email #3: Error**

From: Barbara\_Krupiski98@yahoo.com

Sent: October 5, 2021 at 9:30

To:

CC:

Subject: I noticed wrong information on my account. How do I change it?

Dear ,

Here is the MRI report that I was given. I tried to save them to the MY MSKcc.com portal but I could not upload.

Thank you for your assistance,  
Barbara Krupinski

## INTERNATIONAL INTAKE: DISCOVERY DEVELOPMENT

Set up environment

Focus on marrying outcomes with out of the box salesforce solutions

Treat instances as disposable

We learned setting up information in SP was time consuming

Also, learned how to reduce the time to instantiate a SF instance

# INTERNATIONAL INTAKE: DISCOVERY DEVELOPMENT

Cloud logo | Search... | [Star] [Plus] [Question] [Settings] [Bell] [Avatar]

International Center | Accounts | Catherine Renee D... | [Close]

Person Account  
**Ms. Catherine Renee Dupuis** | + Follow

Catherine Renee... | 00587153 | [Close]

Case | [Edit] | Change Owner

Account Name	Medical Record Number	Status	Case Record Type	Case Owner
<a href="#">Catherine Renee Dupuis</a>	27493739	Open	International Patient	International Center Liaison Queue

**Tasks** | Notes | Feed | Related

Tasks | [New Goal] | [Group by: Goal] | [Status: Open]


- Tasks Without Goals
- Goal: Pre- Appointment: New Patient Introduction
- Goal: Pre- Appointment: Welcome Meeting Preparation
- Goal: Pre- Appointment: Forms/Signatures/Explanations


**Details**

International Patient Details

Country of Citizenship	Language
France	French
Country of Residence	Interpreter requested
France	<input checked="" type="checkbox"/>
Main point of contact	Care Department
	Adult
Relationship to the Caller	Referral source
Self	
Contact Number	Financial status
+33 600180253	Insurance
Description	Comments

# INTERNATIONAL INTAKE: PLANNING THE TESTS



★
+
?
⚙️
🔔


☰
International Center
Accounts
▼
👤 Catherine Renee D... ▼ ×

👤
Person Account

## Ms. Catherine Renee Dupuis

+ Follow

👤 Catherine Renee...
👛 00587153 ▼ ×

📧

### Tasks

New Goal ▼

Group by Goal      Status Open

>  **Tasks Without Goals**

▼  **Goal**  
**Pre- Appointment: New Patient Introduction**

	SUBJECT	DUE DATE	STATUS	TASK OWNER
<input type="checkbox"/>	Outreach Email	Oct 22, 2021	Open	J Z <span style="font-size: 0.8em;">✎</span>
<input type="checkbox"/>	MyMSK InvitationMyMSK Invitation	Oct 22, 2021	Open	J Z <span style="font-size: 0.8em;">✎</span>

[+ Add new task](#)

>  **Goal**  
**Pre- Appointment: Welcome Meeting Preparation**

>  **Goal**  
**Pre- Appointment: Forms/Signatures/Explanations**

>  **Goal**  
**Pre- Appointment: Post Welcome Meeting Follow Up**

▼ **International Patient Details**

Country of Citizenship	Language
France <span style="font-size: 0.8em;">✎</span>	French <span style="font-size: 0.8em;">✎</span>
Country of Residence	Interpreter requested
France <span style="font-size: 0.8em;">✎</span>	<input checked="" type="checkbox"/> <span style="font-size: 0.8em;">✎</span>
Main point of contact	Care Department
<span style="font-size: 0.8em;">✎</span>	Adult <span style="font-size: 0.8em;">✎</span>
Relationship to the Caller	Referral source
Self <span style="font-size: 0.8em;">✎</span>	<span style="font-size: 0.8em;">✎</span>
Contact Number	Financial status
+33 600180253 <span style="font-size: 0.8em;">✎</span>	Insurance <span style="font-size: 0.8em;">✎</span>
Description <span style="font-size: 0.8em;">✎</span>	Comments <span style="font-size: 0.8em;">✎</span>

▼ **Initial Visit Appointment Details**

Provider Name <span style="font-size: 0.8em;">✎</span>	Service <span style="font-size: 0.8em;">✎</span>
Appointment Date	Appointment Location
11/19/2021 <span style="font-size: 0.8em;">✎</span>	General Hospital <span style="font-size: 0.8em;">✎</span>
Appointment Time	Appointment Notes
16:30 EST <span style="font-size: 0.8em;">✎</span>	<a href="https://meetmsk.zo">https://meetmsk.zo</a> <span style="font-size: 0.8em;">✎</span>

## INTERNATIONAL INTAKE: THE SOLUTION

The prototype testing with the liaison went well.

**As expected we didn't score high as we wanted** ... but because we took the time to build the prototype in a Salesforce environment – we designed updates, the devs implemented them, and we were back at another round of testing within a week ...

where we faired better!



**Goals ++**

← →

**Goals**

Status Medical Information Gathering

**Goals**

Status Escalation

**Goals**

**Referral / Medical**

Referral Initiated On *timestamp*  
 Diagnosis Site *optionList*  
 Initiated By *textfield*  
 DX Status *optionList*  
 Referral From *optionList*  
 Current Physician *lookup*  
 Ref Department / Ref To *textfield*

**Clinical Information**

Clinical Info *textfield*  
 Add *button*

**Clinical Tests**

Type Of Test *textfield*  
 Test Date *timestamp*  
 Test Location *textfield*  
 Result / Impression *textarea*  
 Add *button*

**Requested Doctors**

Requested MD *lookup*  
 Add *button*  
 MD Review *textfield*  
 Source Info *textfield*  
 PAS Visit Type *textfield*  
 Appointment has been Scheduled *textfield*

**Escalation / Assignment**

Who should be assigned / notified? *optionList*

**PFS Counseling**

key *datatype*  
 key *datatype*  
 key *datatype*

What fields do we need to Capture for PFS?

External, "Other",

option\_1, "option\_2", "option\_3", "option\_4", "option\_5", "option\_6", "option\_7", "option\_8", .. ..

**Assigned\_Notified**

"Nurse", "Medical Doctor", "Patient Financial Service"

**Lookup**

<optionList\_value> *lookup*  
 assignCase *button*  
 sendNotification *button*  
 sendEmail *button*  
 checkAvailiablity *button*

## FROM THIS RESEARCH WE'VE OPTIMIZED THE FLOW

Using structure set up in Service Platform, we can reduce the reliance on Excel and third party tools

By implementing standardized Milestones (Goals + Tasks) we can allow teams to

1. Expose where a patient is along the journey
2. Track work done and identify blockers
3. Assist liaisons in a structure, yet organic, workflow ...



# Case Study: International Center

## The Challenges

## INTERNATIONAL INTAKE: THE CHALLENGES

We completed 2 rounds of usability tests in two sprints in between rapid updates based upon user feedback and observation.

We achieved our goal to go from a whole PI of just discovery to one sprint of the complete Design Think workflow!

# INTERNATIONAL INTAKE: THE CHALLENGES

Even though we were able to test with hi-fidelity prototypes in Salesforce with real Liaison end-users, we still are optimizing the flow to make the experience more streamlined.

Moving through the double-diamonds ( discovery > design > testing > ) we're able to get further faster to the last stage (delivery) and can accommodate changes from user feedback without a heavy development lift!

# Closing Comments



# CLOSING COMMENTS

We went from frustration to collaboration within the team.

While we enjoy working together as a team, we often feel conflicted by the limitations of the system and the needs of the customer – we realized that this is a shared experience between business, development, and design.

From opposing viewpoints to shared sentiments, resulted in a 100% change in the dynamics of the team.

Also, using robust user data collected from first hand research, we removed all of the guess work that plagued previous projects.