

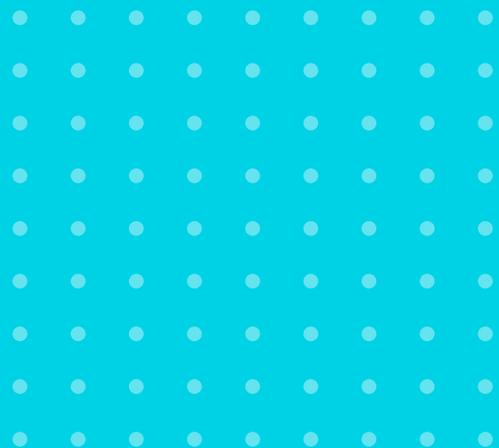
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How to collaborate with stakeholders in healthcare design projects?

Some useful tips and tools to design with patients, doctors, hospital executives and other healthcare stakeholders

Tutorial + Toolkit



The healthcare sector is experiencing a paradigm shift: from illness-focused to wellness-focused, from product-focused to service focused, from treatment-focused to experience-focused.

As a response to this shift, in recent years healthcare organizations have started to apply ‘designerly’ approaches to innovation to improve the engagement of patients and carers in the design and provision of healthcare services. Among the others, Experience-Based Design (EBD), for example, has acquired growing credibility helping foster the focus on human experiences through the collection of stories from patients, families, healthcare professionals addressed by or working in the service. Thanks to this approach, partnership between patients and professionals is enacted, promoting their role of experience experts in charge of the identification of shared areas for improvement. However, the introduction of the design approaches into the healthcare sector has not come without challenges: the differences in mindset can be a source of tension and evidence on the value of design practices into the healthcare sector still need to be provided. Most healthcare managers and operators still overlook the potentialities of a user-centered approach considering patient-centredness as a quality standard related to the involvement of patients in consultations about treatments rather than in the design of care experiences.

** This toolkit was developed by students of the VII edition of the Specializing Master in Service Design of POLI.design - Politecnico di Milano within a didactic activity, with the support of service designers with expertise in the healthcare sector. No validation process has been undertaken to verify its usability and efficacy. If you have the chance to use it please send us a feedback at info@servicedesigntools.org. Your case study could be included into the platform as a reference to support further applications.*

This tutorial and toolkit* aims to tackle this challenge and to help service designers in collaborating and communicating with stakeholders in the design of healthcare services.

It consists of a 4-step guideline that through the adaptation of basic service design tools, to be used in combination with illustrated cards, can support designers in building their relationship with patients, carers or healthcare professionals, establishing a common language and visualizing intangible elements and processes.

Into the toolkit, a template and a set of cards are proposed for each tool. Cards aim at supporting the reflection suggesting possible actors, environments, channels, values and emotions to fill the templates. They must not be considered exhaustive of all the possible situations. For this reason, every set includes empty cards which can be customized for specific contexts and projects.

References

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01

Align everyone's objectives

MAIN TOOL USED



VALUE ALIGNMENT
CANVAS

When dealing with a service design project, by nature participatory and co-creative, it is important that all stakeholders are aligned from the beginning on objectives and expectations to ensure smooth and effective collaboration and meaningful results for all the people involved.

To do so, tools like the Expectation Map¹ or the Alignment Canvas² can be useful to understand everyone's vision and priorities and to synchronize the team's understanding of the project scope.

They help align everyone's objectives at the beginning of the project, envision user expectations from the service, build empathy and provide a holistic view on different perspectives.

The canvas proposed by this toolkit is made of a simple diagram to help identify each stakeholder's values and objectives, highlighting points in common and intersections. Visual cards with the different actors and values are used to fill the canvas.

TIPS

- Each stakeholder group can select its values from cards or add others;
- discuss common and contrasting values, formulate shared objectives.
- If your project includes more than three stakeholders, feel free to adopt the same conceptual model to map all their values and intersections.

CARDS USED



Actors



Values

¹ See for example <http://healthcaredesignthinking.com/toolkit/chewables/chewable/expectation-maps> or <https://toi.expert/en/tool/expectation-mapping/#:~:text=Expectation%20Mapping%20visualizes%20the%20expectations,make%2C%20think%2Ffeel>

² See for example <https://www.studiorupt.com/aligning-organizational-goals-with-the-alignment-canvas/>

02

Understand the project ecosystem

MAIN TOOL USED



HEALTHCARE
STAKEHOLDER MAP

Healthcare services involve different kinds of actors who engage in specific relationships among them and with the main user of the service. Thus, it is important to understand who will be impacted, and at which level, by the service being designed.

Use a stakeholder map to reflect on the roles and responsibilities of the different service actors, to be more aware of the ecosystem in which you are designing for.

The stakeholder map not only helps visualize the different categories of stakeholders involved in the service system and into the user experience, but also their degree of interaction with the primary user. The template suggests three possible categories of healthcare stakeholders: healthcare operators, support persons and larger social community of the patient.

TIPS

- Place the actor card representing the primary user or stakeholder in the center;
- sort the actor cards based on the stakeholder group they belong to and place the cards in their corresponding sectors of the canvas;
- place the actors who have higher degrees of interaction with the primary stakeholder in the inner ring;
- consider the broader ecosystem beyond the healthcare system.

CARDS USED

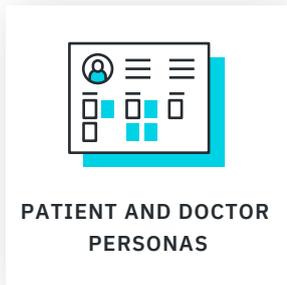


Actors

03

Reflect on different user-types

MAIN TOOL USED



Conduct research into the project context to gather first-hand insights on behaviours, motivations and characteristics of people involved in the service ecosystem. Building personas helps better understand the needs, habits and attitudes of both patients and doctors (or other healthcare operators) within the healthcare service being designed. In order to better support this phase of analysis, the personas templates included in this toolkit contain healthcare specific factors for patient and doctor profiles, such as illness types and medical literacy.

TIPS

- For the patient persona, start by selecting the type of patient and illness;
- for the doctor persona, firstly select the doctor profile and write down pain points.
- Using the cards, select the environments and actors the persona interacts with, the channels they prefer, their values and the emotions they experience.

CARDS USED



Actors



Environment



Channels



Illness type



Emotions



Values

04

Analyze the experience and envision better service journeys

MAIN TOOL USED



We are all aware that the user journey is a powerful tool to map out the service experience, both the one in place and the one still to be designed. This can be done together with patients and other healthcare stakeholders, helping to create a common understanding of how the experience is or could be. You can also work directly with stakeholders, to identify specific pain-points and other factors that could be causing friction within the service.

The healthcare journey map proposed by this toolkit can be used to analyse and visualize the experience undergone by the patient and/or the healthcare operators, looking at all components of the experience: the actors involved, the actions undergone, the channels used and the emotions experienced while receiving or performing the healthcare service.

TIPS

- Write the persona profile the user journey map is for;
- use the cards as trigger materials to facilitate experience sharing and storytelling with patients and medical stakeholders,
- select the emotions being experienced for each action and display them vertically under the corresponding action.

The patient journey can follow the entire treatment pathway, and so help understanding the issues that may occur at the intersection of different medical steps and departments involved, developing an holistic view of the experience.

CARDS USED



Actors



Environment



Channels



Illness type



Emotions



Values



Phases

05

Prioritize ideas through evaluation

MAIN TOOL USED



**SERVICE DESIGN
SCORECARD**

After context framing and analysis of insights and experiences it is time to generate solutions. Run concept generation involving different stakeholders is useful to favor the introduction of changes or to facilitate the acceptance of new services.

Once solutions are identified, the selection of the most promising or suitable ones is a task not to be underestimated, especially in complex contexts such as those related to healthcare.

To do so, we suggest the Service Design Scorecard³ as an easily approachable tool to facilitate this phase of the process, especially when involving non-designers.

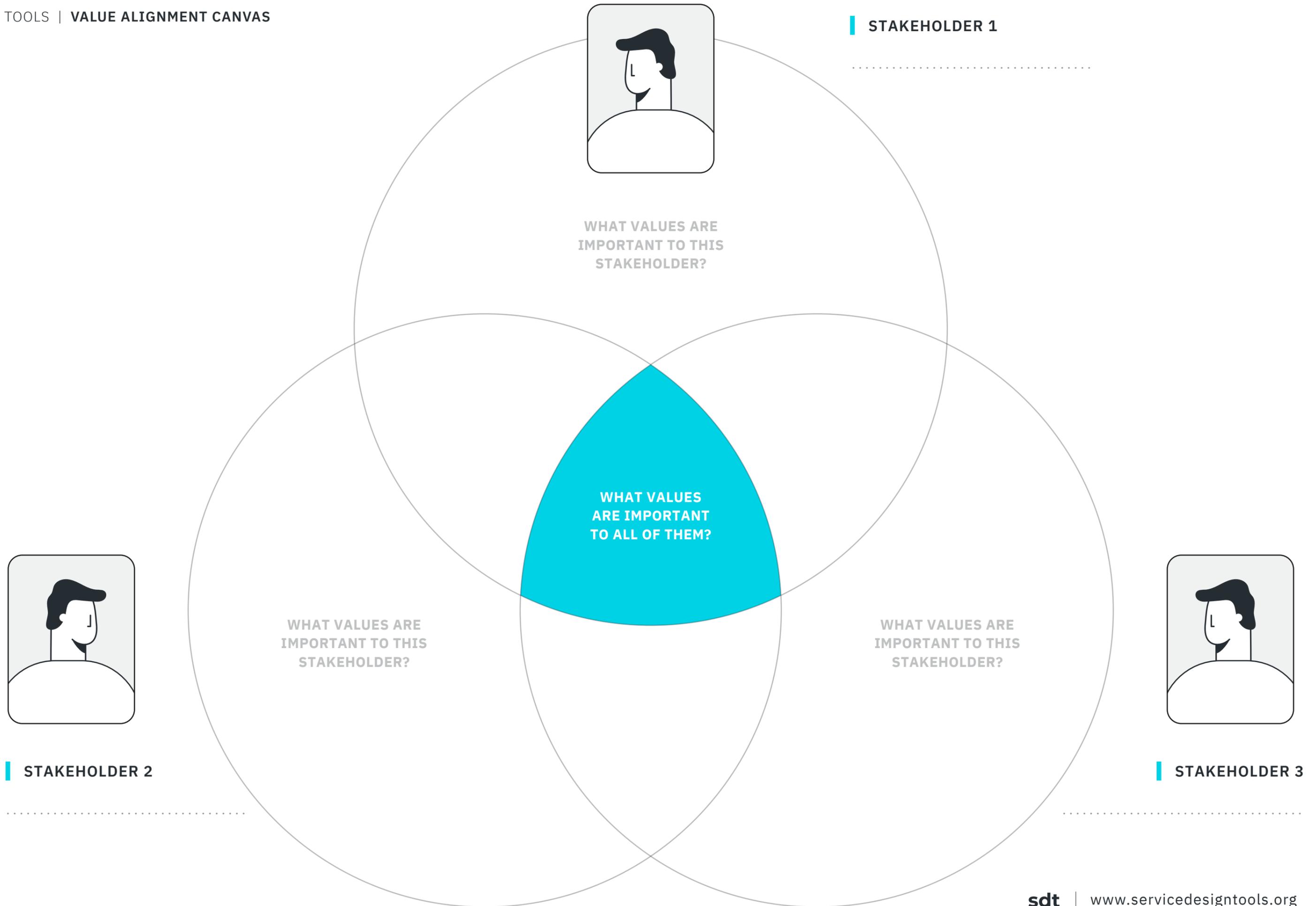
It allows assessing solutions according to 4 main components: desirability, feasibility, viability, and strategic value, examining the degree to which the solution is aligned to the stakeholders' goals, by simply answering to some critical questions.

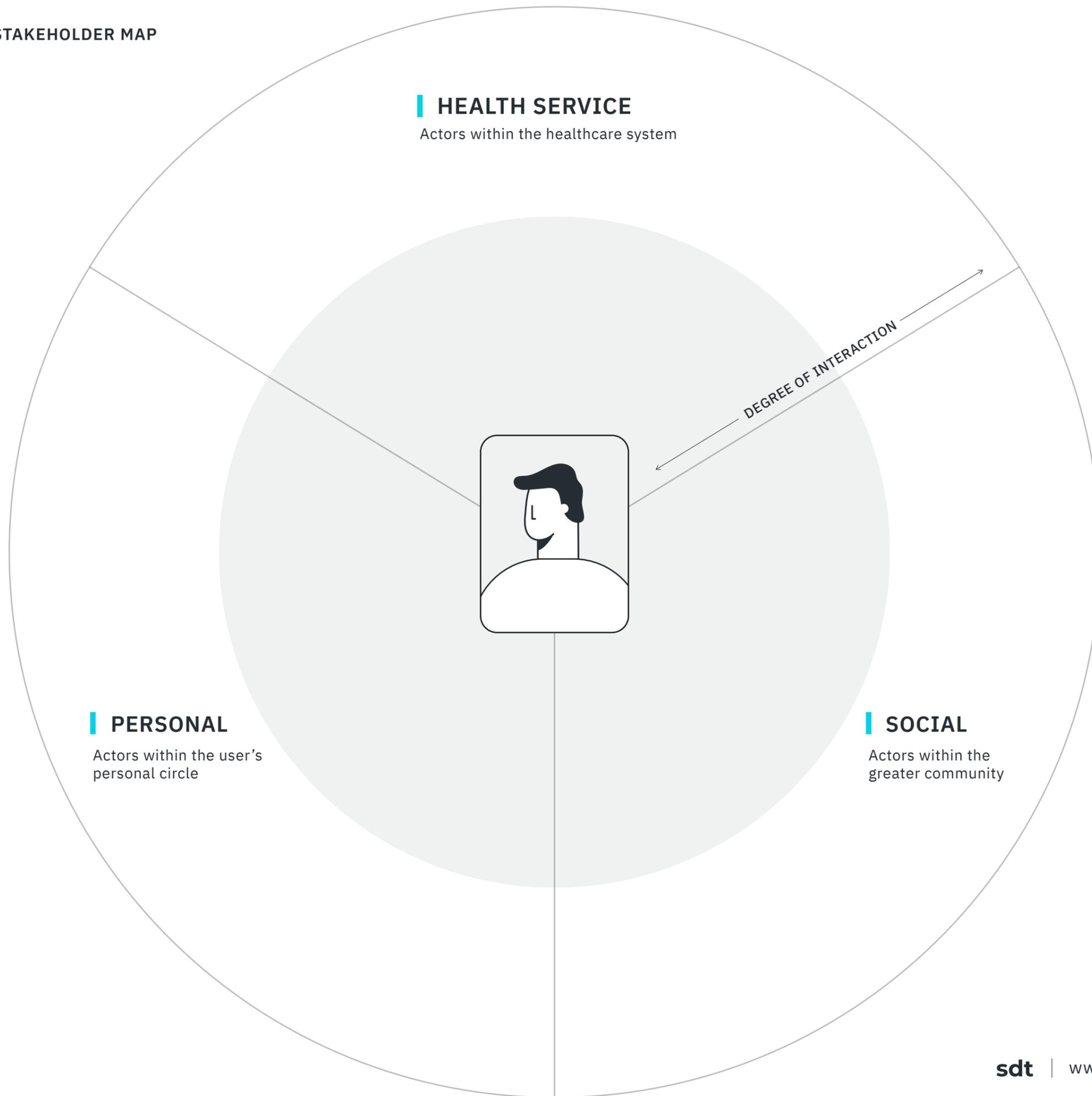
The canvas you can find in this toolkit can be used to run your evaluations with healthcare stakeholders or any other project you might face.

TIPS

- Identify key stakeholders to be involved in the evaluation session;
- synthesize solutions to be evaluated in an effective way so to avoid misinterpretations;
- if needed customize criteria and scoring according to what suits best to your project.

³ See for example <https://info.themoment.is/sd-scorecard>





HEALTH SERVICE

Actors within the healthcare system

PERSONAL

Actors within the user's personal circle

SOCIAL

Actors within the greater community

DEGREE OF INTERACTION



DEMOGRAPHICS

Who is the doctor?

NAME

AGE

SPECIALIZATION.....

FAMILY STATUS

NEEDS AND STRUGGLES

What are their needs and the challenges they are facing

.....

.....

.....

.....

PROFICIENCIES

What are their capabilities

Willingness to Change



Technology



Self - Care



ENVIRONMENT

Where they work

A large, empty rounded rectangular box with a thin grey border, intended for describing the doctor's work environment.

ACTORS

Who they interact with

A large, empty rounded rectangular box with a thin grey border, intended for listing the people or groups the doctor interacts with.

EMOTIONS

How they feel

A large, empty rounded rectangular box with a thin grey border, intended for describing the doctor's feelings or emotional state.

VALUES

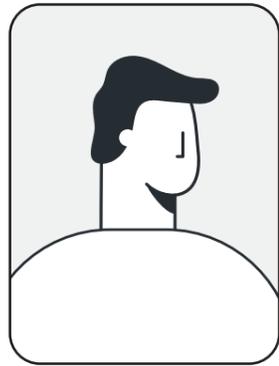
What is important to them

A large, empty rounded rectangular box with a thin grey border, intended for describing the doctor's core values.

CHANNELS

How they communicate with the patients

A large, empty rounded rectangular box with a thin grey border, intended for describing the communication channels used by the doctor.



DEMOGRAPHICS

Who is the patient?

NAME

AGE

FAMILY STATUS

ECONOMIC STATUS

ILLNESS TYPE

What kind of illness the patient has

CRITICALITY

DURATION

NEEDS AND STRUGGLES

What are their needs and the challenges they are facing

.....

.....

.....

.....

PROFICIENCIES

What are their capabilities

Medical Literacy & Knowledge



Technology



Self - Care



ENVIRONMENT

Places they interacts with

ACTORS

Who they interact with

EMOTIONS

How they feel

VALUES

What is important to them

CHANNELS

How they communicate with the doctor

PROFILE

Who is the user?

ILLNESS TYPE

Illness type & criticality

PHASES

Stages they go through

ACTIONS

Steps they complete

ENVIRONMENT

Where the actions happen

ACTORS

Who they interact with

CHANNELS

How they communicate with other actors

EMOTIONS

How they feel

STRATEGIC VALUE

Strategic goals alignment

DESIRABILITY

Customer value

VIABILITY

Business value

FEASIBILITY

Technical or organizational
doability

| QUESTIONS TO CONSIDER

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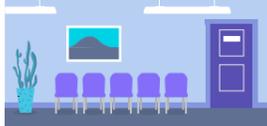
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ACTORS

<p>Doctor</p>  <p>Medical professional primarily responsible for patient's treatment</p>	<p>Nurse</p>  <p>Medical professional assisting doctor with patient's treatment</p>	<p>Patient</p>  <p>Individual receiving care or medical services</p>	<p>Caregiver</p>  <p>Person supporting the patient and assisting in managing the illness</p>	<p>Family</p>  <p>Loved ones and relatives of the patient</p>	<p>Ambulance</p>  <p>Medical staff first to arrive on scene and transport the patient to the medical centre</p>	<p>Receptionist</p>  <p>Workers greeting patients at the entrance of the medical centre</p>	<p>Management</p>  <p>Staff in charge of the operational tasks of the medical centre</p>
<p>Billing & Records Staff</p>  <p>Administrative staff responsible for payment and patient records</p>	<p>Social Worker</p>  <p>trained person helping enhance patient & family well-being and self-reliance</p>	<p>Therapist</p>  <p>Professional who psychologically treats emotional/mental issues</p>	<p>Specialist</p>  <p>Medical professional specializing in a specific branch of medicine</p>	<p>Pharmacist</p>  <p>Medical professional licensed to administer drugs and vaccines</p>	<p>Designer</p>  <p>Professional who researches, creates and improves products and services</p>	<p>Researcher</p>  <p>Individual specializing in conducting medical research investigations</p>	<p>Professor</p>  <p>Academic who is an expert in their respective field</p>
<p>Business Team</p>  <p>team responsible for a medical centre's business/financial operations</p>	<p>Insurance Agent</p>  <p>person working for an insurance company to sell insurance products</p>	<p>Primary Care Physician</p>  <p>General practitioner, usually the first contact of an undiagnosed patient</p>	<p>Pediatrician</p>  <p>Doctors trained in childhood illnesses and health</p>	<p>Surgeon</p>  <p>Physician who performs surgeries, usually specialists</p>	<p>Friends</p>  <p>support persons close to the patient who are not family</p>	<p>Support Group</p>  <p>A group or people with common experiences providing emotional/moral support</p>	<p>Lab Specialist</p>  <p>Medical professional who conducts tests in laboratory setting</p>

ENVIRONMENT

<p>Ambulance</p>  <p>Medical vehicle transporting patient to the care facility</p>	<p>Waiting Room</p>  <p>Where patients, families and friends wait before, during and after a visit</p>	<p>Home</p>  <p>In the patient's place of residence</p>	<p>Hospital Reception</p>  <p>Where patients enter and are welcomed into the care facility</p>	<p>Doctor's Office</p>  <p>Where the doctor works, where patients go for checkups/visits</p>	<p>Therapist's Office</p>  <p>Where therapists work, where patients receive therapy treatment</p>	<p>Parking Lot</p>  <p>Where visitor/patient cars are parked when visiting the care facility</p>	<p>Car</p>  <p>The patient, caregiver, family or friend's car used for transportation</p>
<p>Emergency Room</p>  <p>Care area for prompt treatment of acute illness or emergencies</p>	<p>Hospital Bed</p>  <p>Where patients stay when administered to stay in a care facility</p>	<p>Walk-in Clinic</p>  <p>Facility providing basic care on a walk-in basis, no appointment needed</p>	<p>Laboratory</p>  <p>Where tests on the patients are conducted and analyzed</p>	<p>Hospice</p>  <p>Care facility focused on palliative care/support for terminally ill patients</p>	<p>Surgery Room</p>  <p>Where surgical procedures are conducted</p>	<p>Pharmacy</p>  <p>Where pharmacists work, where patients can get prescriptions and drugs</p>	

CHANNELS

 <p>Face-to-Face</p>	 <p>Mobile App</p>	 <p>Phone Call</p>	 <p>Website</p>	 <p>Caregiver</p>	 <p>Info Board</p>		
 <p>Friends & Family</p>	 <p>Kiosk</p>	 <p>Email</p>	 <p>Fax</p>	 <p>Mail</p>			

ILLNESS TYPE

 <p>Stable</p>	 <p>At Risk</p>	 <p>Critical</p>	 <p>Acute</p>	 <p>Chronic</p>	
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EMOTIONS

Happy



Confident | Optimistic

Thankful



Respected | Trusting

Calm



Comfortable | Reassured

Surprised



Shocked | amazed

Focused



Concentrated | Attentive

Nervous



Anxious | Scared

Unsure



Undecided | Doubtful

Sad



Hurt | Depressed

Insecure



Lonely | Vulnerable

Embarrassed



Humiliated | Rejected

Mad



Frustrated | Upset

Tired



Sluggish | Fatigued

Stressed



Burned Out | Tense

VALUES

Ease of Implementation

Time

Affordability

Accessibility

Availability

Personalization

Transparency

Intuitiveness

Innovation

Ease of Use

Understandability

Learnability

Adaptability

Control

Safety

Aesthetics

Convenience

Efficiency

Maintenance

Profitability

Comfort

Emotional Support

PHASES

