Optum Behavior Health Care Explorer

Using Zero Distance and Product Tools to Innovate in Healthcare – a Case Study

TURNBERRY SOLUTIONS | **Optum**

MAY 3, 2023

WHO ARE WE?

Creg Schumann
Product Innovation
Turnberry Solutions

Informed by a good understanding of building cool technology, Creg was an early adopter and adapter of agile techniques (before there was an agile manifesto). His approach is pragmatic not favoring any single method, tool, framework, etc. It's about understanding the problem and selecting a toolkit appropriate to help learning and solving the problem.

He's learned that there is no one perfect answer in organizational change initiatives – there are choices and experiments to learn from. True change is never managed upon an organization: it's when the conditions and perception within the environment are set for the organization itself to choose to change where lasting change is achieved. Barriers to change aren't the tools, processes, roles – it's the lack of trust, low autonomy, unclear purpose, and ignoring the mastery of one's craft that truly impede meaningful change.

He's been part of large teams / organizations or small teams in many industries and solution spaces. Some of his clients he's worked with on transformation are American Airlines, Disney, Ecolab, US Bank, Wells Fargo, Optum, RBC, and many others.

Nate Koering
Product Strategy
Turnberry Solutions

When Nathan was 23 he designed his first sales revenue digital tool for his territory, and bang! He was hooked! Ever since, Nathan has brought a passion for pulling together IT, business, operations, marketing and others and working collaboratively to support their achievement through effective tools. Tools that make lives easier, processes that are just enough to enable and not disable, and organizational frameworks that optimize, stabilize, and foundationally support innovation.

A deep background in facilitation, strategic design, design thinking, and some of the most widely used operational technologies in the market, Nathan's approach is to deliver effective and dynamic outcomes with each client and team he works with.

Jim Christy
Director, Member Engagement
Optum

Jim Christy is Director of Member Engagement for the Optum Whole Health Solutions product team. In this role he is responsible for execution of digital member engagement strategy for the Live and Work Well site as well as integrating content into experiences on myuhc and other platforms. This includes Optum's Care Explorer, a personalized tool that helps members identify the most relevant behavioral health and EAP programs, services and providers for them based on their immediate needs.

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THE CASE FOR CHANGE

SECTION

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1

FINDING CARE
What our members were telling us

OUR MEMBERS DIDN'T UNDERSTAND THEIR BENEFITS, THEY HAD A HARD TIME FINDING THE RIGHT CARE FOR THEM, AND THEY DIDN'T KNOW WHERE TO START.

I don't know my options. Can't this all be in one place?

Finding care is confusing and frustrating. Tell me where to start.

I don't trust my employer with mental health info.

I just want to talk to someone now.

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FINDING CARE
What the market is telling us

HEALTH INSURERS ARE NOT GOOD AT PUTTING THE MEMBER FIRST. THIS MEANS:

1

Lack of personalization

Insurers fall short on consistently personalizing member communications beyond greeting them by name

2

A fragmented user journey

Without a single system/data source insurers lack a complete picture of the member, and don't understand the user journey

3

Disjointed digital experiences

Prioritizing speed-to-market over usability leads to confusion and more phone calls.

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CARE EXPLORER

Starting with the member need

GOALS

Improve satisfaction about process of finding care

Help members understand benefits, including lower levels of care if appropriate

Show that we're listening; demonstrate empathy and build trust

PROCESS

- Vision grounded in customer research
- Focus on the member problem
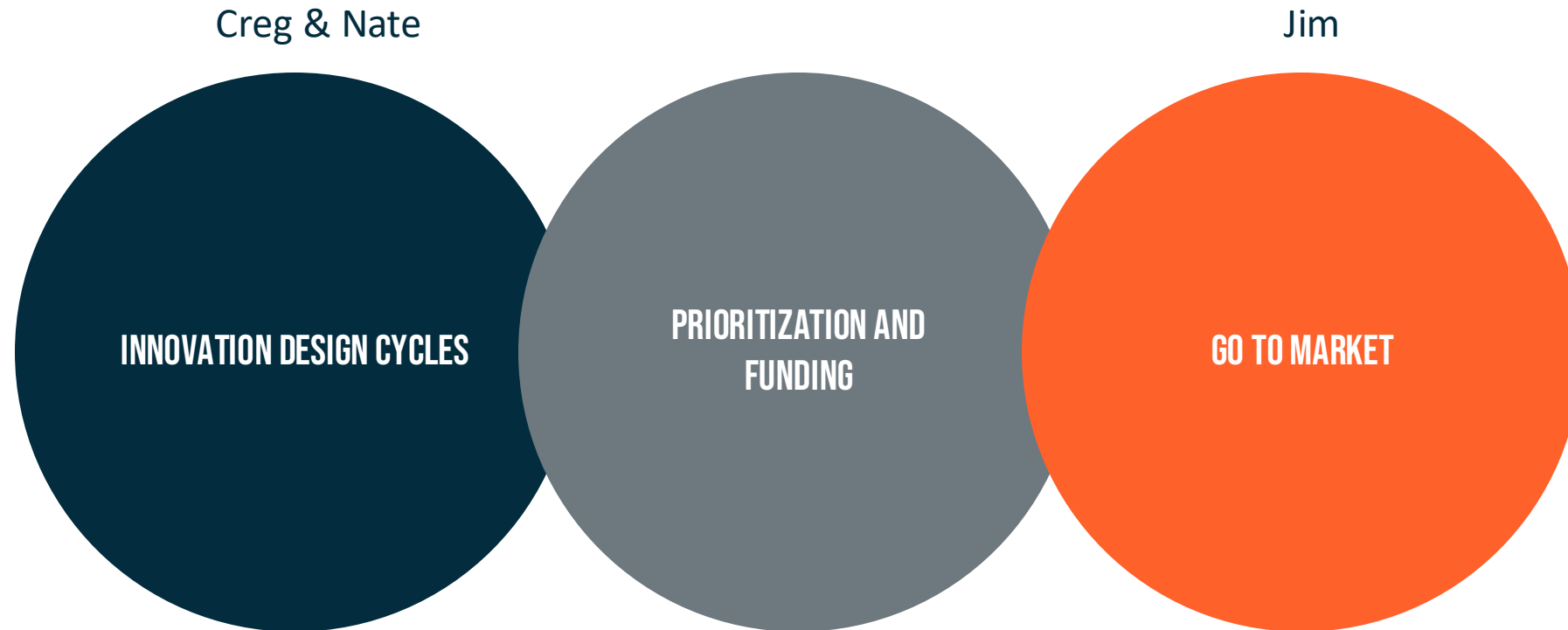- Design sprints with live consumer feedback

Core strategy statement

To provide a more valuable and competitive BH client offering, we will create a digital navigation experience that helps members find the benefits and services they need to feel better, improve their symptoms and feel in control.

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THE JOURNEY

Where did this journey start, and where has it to gone to date?

Creg & Nate

Jim

INNOVATION DESIGN CYCLES

PRIORITIZATION AND FUNDING

GO TO MARKET

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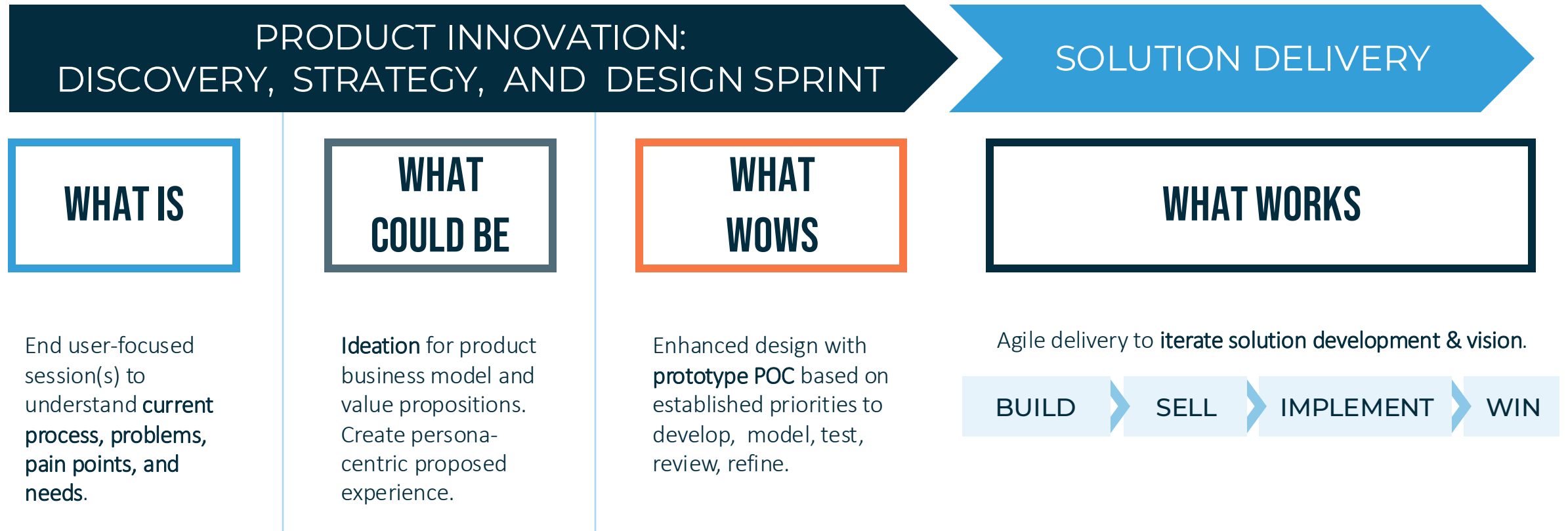# INNOVATION DESIGN

SECTION

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2

ENGAGEMENT OVERVIEW

What did the innovation journey look like and what was its goal?

Turnberry partnered with OBH on a 12-week engagement. The initiative combined product strategy, human centered design, and user experience methods to help drive alignment and produce a prototype for digital Member Guided Experience. In addition, the team produced product and market strategy outputs including RFP language to support internal and external alignment.

PRODUCT INNOVATION:
DISCOVERY, STRATEGY, AND DESIGN SPRINT

SOLUTION DELIVERY

| WHAT IS | WHAT COULD BE | WHAT WOWS | WHAT WORKS |

End user-focused session(s) to understand **current process, problems, pain points, and needs**.

Ideation for product business model and value propositions. Create persona-centric proposed experience.

Enhanced design with **prototype POC** based on established priorities to develop, model, test, review, refine.

Agile delivery to **iterate solution development & vision**.

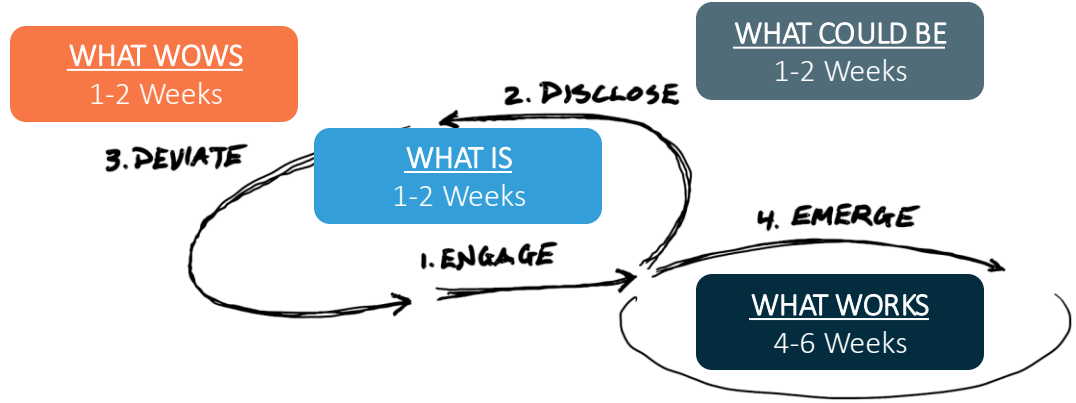BUILD ▶ SELL ▶ IMPLEMENT ▶ WIN

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WHAT IS INNOVATION?

Innovation is more complex and work than most of us understand. Simple inspiration is NOT enough

NOT THIS

MORE LIKE THIS

WHAT WOWS
1-2 Weeks

WHAT COULD BE
1-2 Weeks

WHAT IS
1-2 Weeks
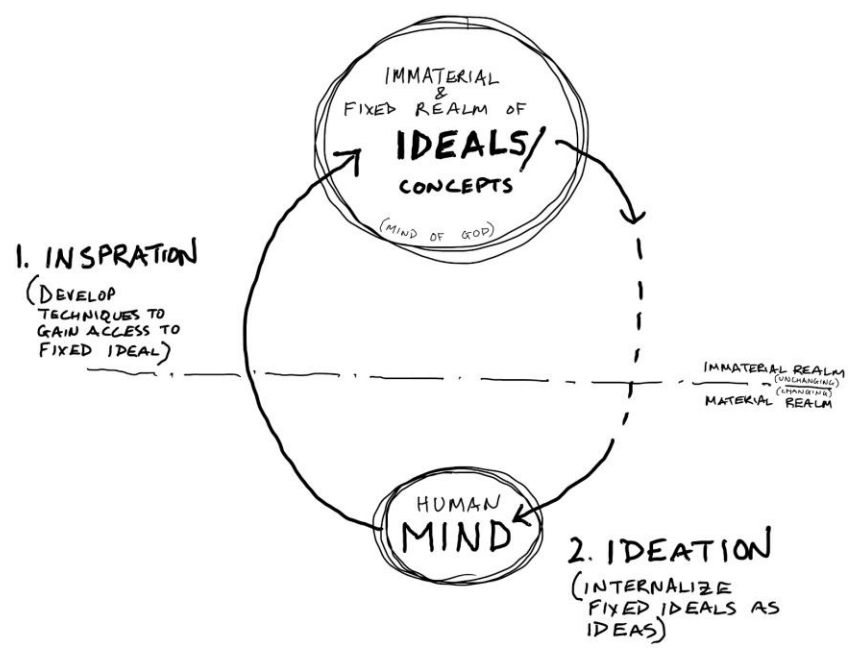
WHAT WORKS
4-6 Weeks

INNOVATION

- The new is when change happens that produces a difference.
- There are two types of difference: Difference-in-degree, and Difference-in-kind
- These two forms of difference/change correspond to two distinct forms of Innovation: Developmental and Disruptive.
- Developmental Innovation is incremental, world expanding, quantitative, probabilistic, and improving.
- Disruptive is rupturing, qualitative, possibilistic, and world making.

INNOVATION DESIGN

- Innovation is production of the genuinely new +
- Design is a process of action towards an outcome =
- Innovation Design is the process for producing the genuinely new.
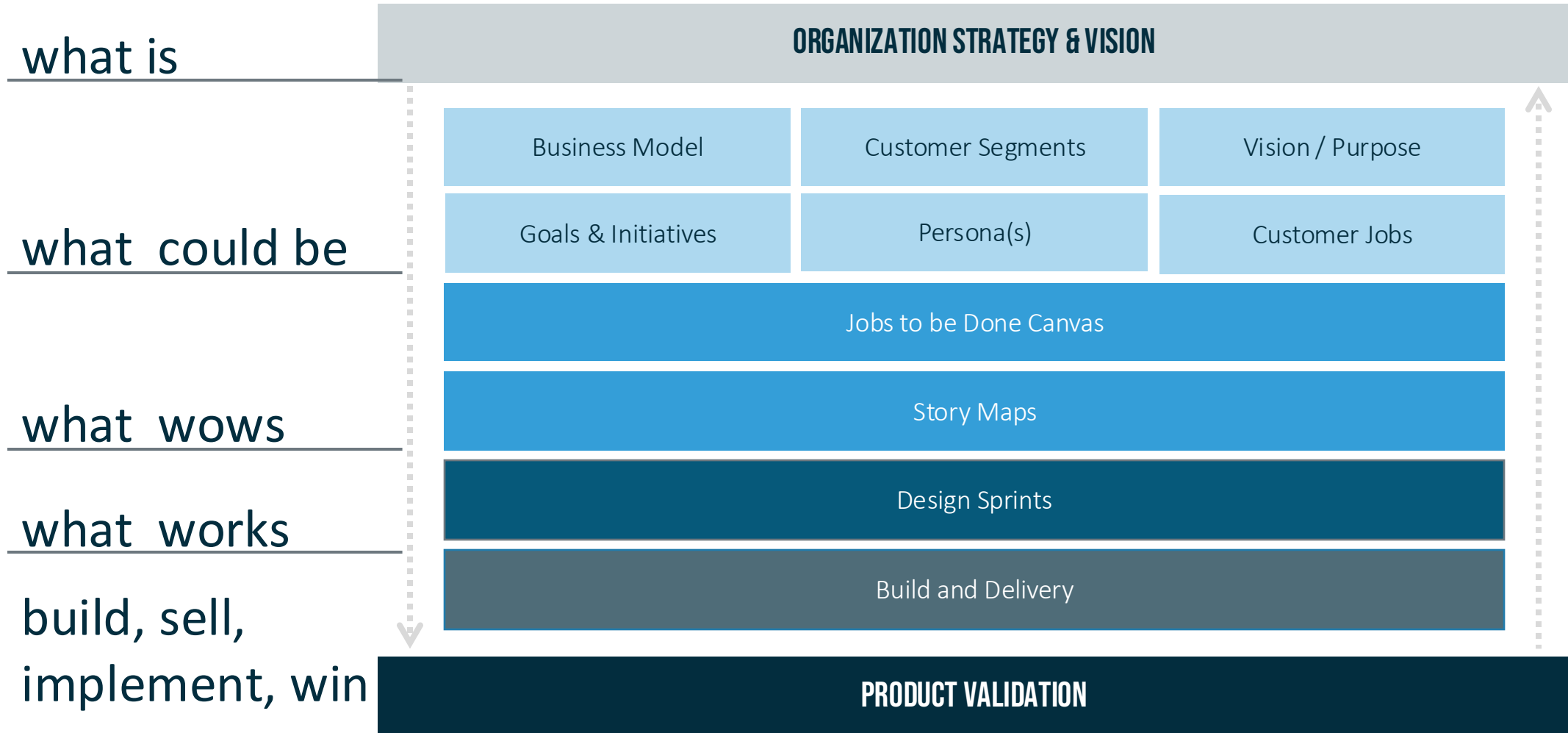
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Reference work from: Emergent Futures Lab

CASE STUDY

Optum Behavior Health Care Explorer

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SECTION

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3

WHAT TOOLS DID WE USE?

what is

what could be

what wows

what works

build, sell, implement, win

ORGANIZATION STRATEGY & VISION

Business Model	Customer Segments	Vision / Purpose
Goals & Initiatives	Persona(s)	Customer Jobs

Jobs to be Done Canvas

Story Maps

Design Sprints

Build and Delivery

PRODUCT VALIDATION

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BUSINESS MODEL

How does a business model help you understand your strategy?

INTERNAL: STRENGTHS & WEAKNESSES

MARKET: THREATS AND OPPORTUNITIES

Key Partners
Who are our Key Partners?
Who are our key suppliers?
Which Key Resources are we acquiring from partners?
Which Key Activities do partners perform?

MOTIVATIONS FOR PARTNERSHIPS
Optimization and economy
Reduction of risk and uncertainty
Acquisition of particular resources and activities

Key Activities
What Key Activities do our Value Propositions require?
Our Distribution Channels?
Customer Relationships?
Revenue streams?

CATEGORIES
Production
Problem Solving
Platform/Network

Value Propositions
What value do we deliver to the customer?
Which one of our customer's problems are we helping to solve?
What bundles of products and services are we offering to each Customer Segment?
Which customer needs are we satisfying?

CHARACTERISTICS
Newness
Performance
Customization
"Getting the Job Done"
Design
Brand/Status
Price
Cost Reduction
Risk Reduction
Accessibility
Convenience/Usability

Customer Relationships
What type of relationship does each of our Customer Segments expect us to establish and maintain with them?
Which ones have we established?
How are they integrated with the rest of our business model?
How costly are they?

EXAMPLES
Personal assistance
Dedicated Personal Assistance
Self-Service
Automated Services
Communities
Co-creation

Customer Segments
For whom are we creating value?
Who are our most important customers?

Mass Market
Niche Market
Segmented
Diversified
Multi-sided Platform

Key Resources
What Key Resources do our Value Propositions require?
Our Distribution Channels? Customer Relationships?
Revenue Streams?

TYPES OF RESOURCES
Physical
Intellectual (brand patents, copyrights, data)

Channels
Through which Channels do our Customer Segments want to be reached?
How are we reaching them now?
How are our Channels integrated?
Which ones work best?
Which ones are most cost-efficient?
How are we integrating them with customer routines?

CHANNEL PHASES
1. Awareness
How do we raise awareness about our company's products and services?
2. Evaluation
How do we help customers evaluate our organization's Value Proposition?
3. Purchase
How do we allow customers to purchase specific products and services?
4. Delivery
How do we deliver a Value Proposition to customers?
5. After sales
How do we provide post-purchase customer support?

Cost Structure
What are the most important costs inherent in our business model?
Which Key Resources are most expensive?
Which Key Activities are most expensive?

IS YOUR BUSINESS MORE
Cost Driven (leanest cost structure, low price value proposition, maximum automation, extensive outsourcing)
Value Driven (focused on value creation, premium value proposition)

SAMPLE CHARACTERISTICS
Fixed Costs (salaries, rents, utilities)
Variable costs
Economies of scale
Economies of scope

Revenue Streams
For what value are our customers really willing to pay?
For what do they currently pay?
How are they currently paying?
How would they prefer to pay?
How much does each Revenue Stream contribute to overall revenues?

TYPES
Asset sale
Usage fee
Subscription Fees
Lending/Renting/Leasing
Licensing
Brokerage fees
Advertising

FIXED PRICING
List Price
Product feature dependent
Customer segment dependent
Volume dependent

DYNAMIC PRICING
Negotiation (bargaining)
Yield Management
Real-time-Market

- PRODUCT OFFERINGS
- CLIENT NEEDS

- STAFFING
- TECHNOLOGY
- PARTNERSHIPS

- CUSTOMERS
- CUSTOMER SEGMENTS
- PERSONAS

- POTENTIAL SIZE
- MODEL STRUCTURE

STAFFING PLAN, TECHNOLOGY PLAN, & PARTNERSHIPS

SALES PLAN, ENGAGEMENT PLAN, & MARKETING PLAN

- SALES PLAN
- STAFFING PLAN
- TECHNOLOGY PLAN
- MARKETING PLAN
- PARTNERSHIP AGREEMENTS (EXTERNALLY AND CROSS CAPABILITY)

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CARE EXPLORER BMC

KEY PARTNERS ★

Psych Hub	Healthwise	The Big Know
Rally Coaching Product Team	Optum Digital's virtual visit platform?	Wayfinder
Sanvello	UHG Social Responsibility	Our Payer clients
Optum EAP	Optum RX	AbleTo
The Big Know	Aunt Bertha / Psych Hub / Sanvello	
A4Me	Genoa - Virtual Visit Platform	Optum RX Virtual Visit - Opportunity??
Lyra	Ginger	Virgin Pulse

KEY ACTIVITIES ★

Technology Build Out	Support Group Enablement	Technology Launch
Operations	Goals and Reporting Measurement	Capacity Build on Optum EAP staff for Talk Now
Marketing - engaging, impression, campaigns	Create pricing	

KEY RESOURCES ★

	the IT infrastructure	Development and Operations Funding
well vetted content	Artificial Intelligence	Clinical expertise
Digital Experience	Product Teams	Human Centered Design

VALUE PROPOSITION ★

help me navigate to a solution	help me get closer to feeling better	A Safe Space
Acknowledging reality - this is hard	offering me something that is easy, fast and works	making you feel heard and helping you connect to what you need
getting something I value in 1 sitting	Improving access to care/ resources	Free to the member
Reduced cost of care down the line	Reducing stigma	Providing educational resources
I can talk to someone now	A desire to come back and utilize other tools and content	The experience is tailored for your situation and presents appropriate options
As society advances - care options will meet modern ways of providing help (hub and spoke - plug in new options)	LONG GOAL: Hitchhiker's Guide - it learns and supports in context	

CUSTOMER RELATIONSHIPS ★

Client & Employer (UHC & Direct)	Demonstrate care - relationship built on care	help their employees stay healthy
Work Life Integration	Trusted subject matter experts	
Member	Sherpa	Understand I'm struggling and will help me
Ideal: can give me info I need	We make the system easier	Give an "out" from navigating to talking

CHANNELS ★

What is it going to take to win against Lyra?	Love to chat ideally in the flow / = Cost

CUSTOMER SEGMENTS ★

Innermost	Second Ring	Third Ring
A Mark	Supports Mark	Clients / Employers
Someone Supporting Mark	Client Stakeholders	UHC and Direct
Not a Mark but on continuum	UHG and OBH Teams	Payor
Non-Member		Health Care
		Industry
		Community
		Innovation opportunities

COST STRUCTURE ★

Budget: $1.5MM for 2021 for Cupcake	Platform Operations	EAP Capacity - Talk Now	Understand vendor / partner costs increase for talk now and how pricing must change
What are the partner carrying costs for needs of Mental Health Connect?	What are systems costs to update to handle coaching and talk now capabilities?	Are there partner cost sharing opportunities?	

http://www.businessmodelgeneration.com/canvas

REVENUE STREAMS ★

Client customized messaging/ content	"Better" = integrating with other sites	"Best" = let customers build their own experience on our APIs and/or content
Connect with the right intensity of services	Evidence Based Care	Improve client retention (via better NPS)
$$ for Talk Now????	Hypothesis: Engaging Early is Better - some level of prevention should be seen (i.e. informed consumer gets what they need - outcome realized)	Better outcomes for the member lowers cost and
		Speed to care: shorten time to access to support
		More access to more care options

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PERSONA WITH EMPATHY

JOBS TO BE DONE

ORGANIZING FOR STORY MAPS

Story Maps shown in logical order that a Mark would typically go through experience

| DEFINING WHAT IS GOING ON | LEARNING ABOUT MARK | FINDING WHAT CARE I CAN GET | BEING READY FOR THERAPY |

| Define what is going on and name it. | Understand Mark and progressively learn about him. | Figure out what care I can get and what my options are. | I want to get ready for my first appointment. |

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EXAMPLE STORY MAP
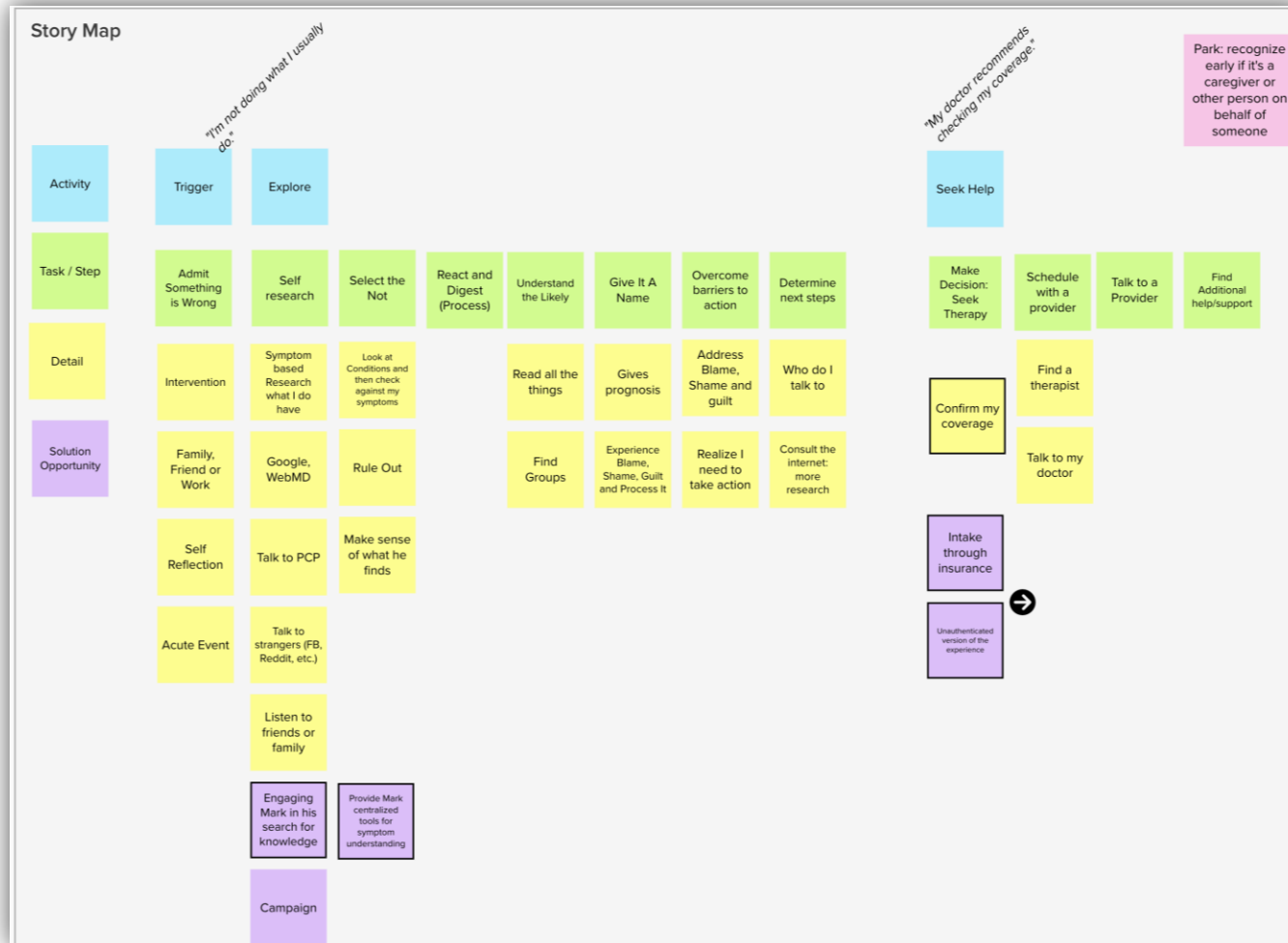
Define what is going on and name it.

This story map represents the trigger that gets Mark to come to our experience:

- Triggering event
- Leads to self-research (Doctor Google)
- Looking to give it a name
- Makes decision to seek help

DESIGN SPRINTS

A design sprint is a time-constrained (one week), five-phase process that uses design thinking with the aim of reducing the risk when bringing a new product, service or a feature to the market.

MAP	SKETCH	DECIDE	PROTOTYPE	TEST
Define project scope and Map the user journey	Lightning Demos, Sketch workshop to create ideas	Discuss and Vote for the most interesting idea	Translate your Idea into an Interactive prototype	Test your prototype and report the results
MONDAY	**TUESDAY**	**WEDNESDAY**	**THURSDAY**	**FRIDAY**

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zero distance

|DAY 1 RESULTS
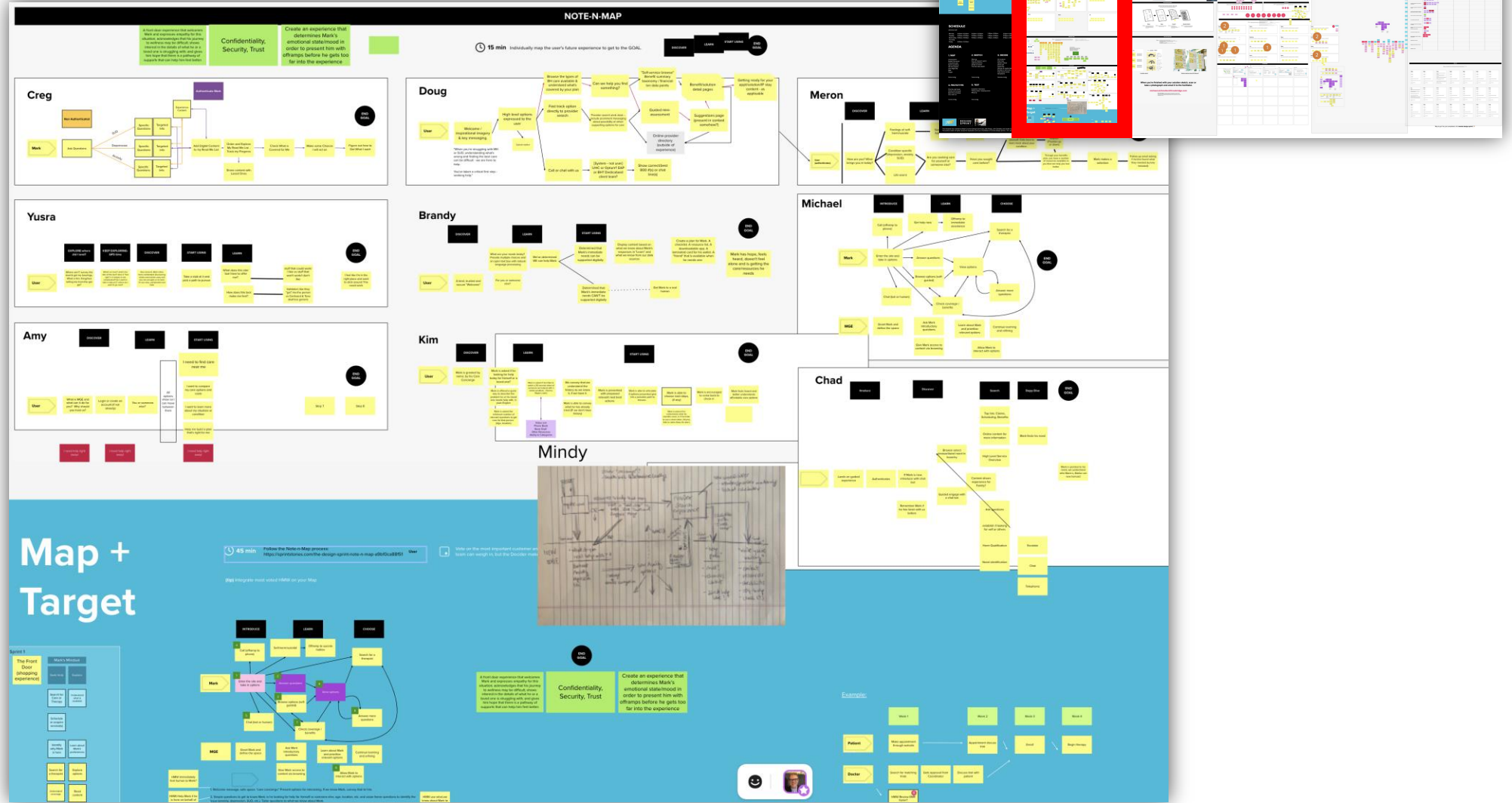
DAY 5 – THE RESULTS
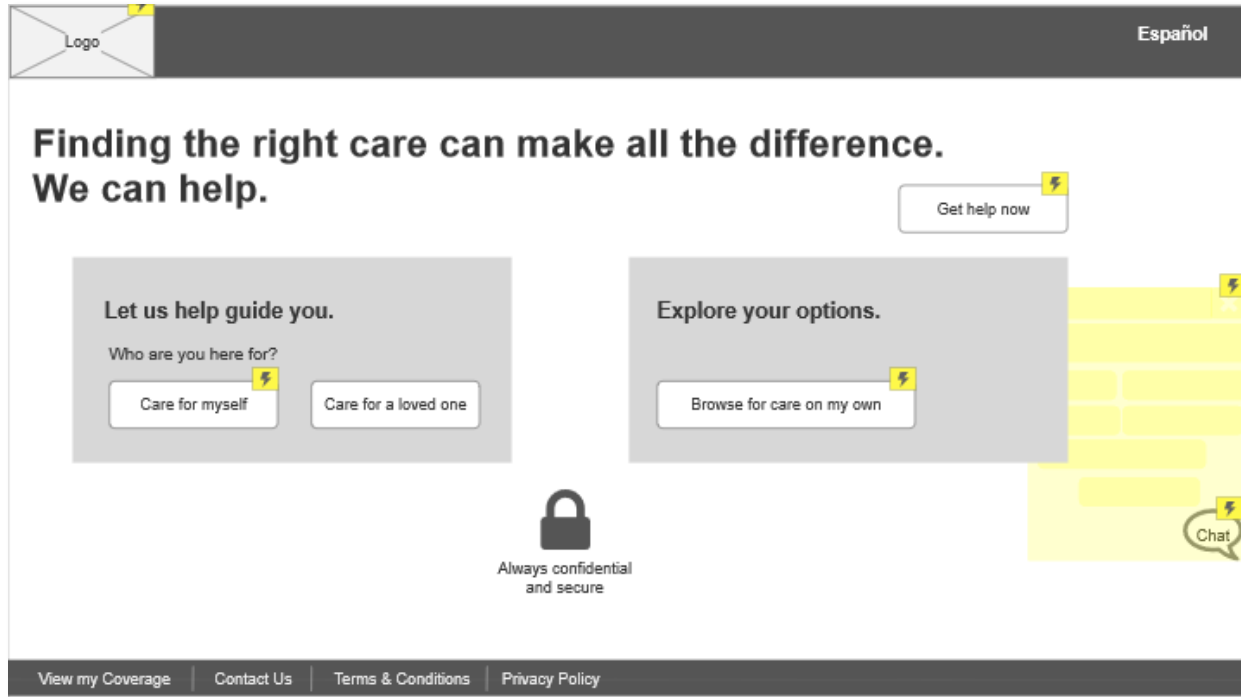
ORIGINAL HOME SCREEN

- Used for testing during design sprint 1 (Not tested to members)
- More fidelity
- Didn't like the look
- Needs a more prominent suicide/emergency hotline or resource
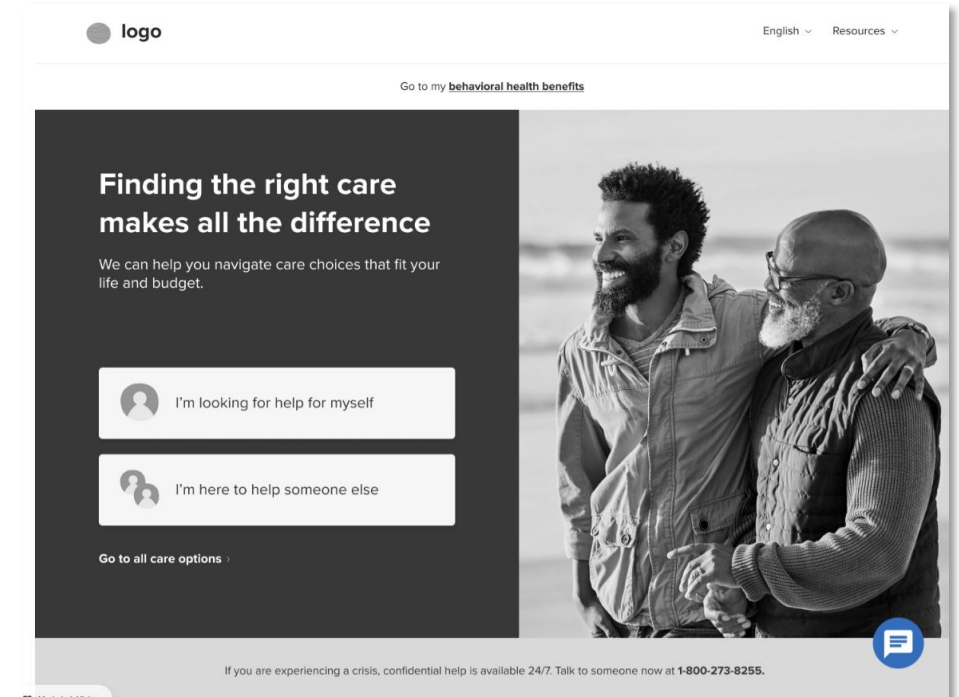
REDESIGNED HOME SCREEN

- Used for testing during design sprint 2
- Calming imagery
- Hotline at bottom
- Less prominent "Find all care options"

CARE EXPLORER

What this digital experience looks like

SECTION

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4

Supporting individuals, caregivers, and family members

Understanding an individual's needs, through their eyes

What are your goals?

Defining your goals can be a good first step. Choose as many as you think apply to you.

Feel less lonely or isolated	**Feel less sad**	Feel less worried or stressed
Feel less hopeless or worthless	Cut back on alcohol or drug use	**Cope better with stress**
Improve relationships	Have more energy and focus	Not sure or none of these

Skip to all benefits   Continue

Delivering personalized care options

Dr. Yusra Benhalim

Chris,

Thanks for telling us why you're here. Based on what you told us, here are some recommendations for you.

Get support with Virtual Coaching

Feel like you need to talk with someone? Connecting with a person can make all the difference. You can talk with a dedicated coach to help you build skills you can use to feel better.

Estimated Cost: $0-$20

- Evidence-based tools and techniques. AbleTo was developed with the world's leading experts in cognitive-behavioral therapy (CBT), and is designed to help you build on your progress each week.
- Dedicated support. Your coach will focus on your specific goals. Get access via phone and in-app messaging.
- Professional advice and guidance to help you feel better day-to-day.

Get help

Explore Therapy

Think you can benefit from short-term counseling or a longer-term therapist? We can help you understand what's available for you and how to choose what's right for you.

Estimated Cost: $0-$150/Visit

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CARE EXPLORER EVOLUTION

January, 2022

June, 2022

Q3, 2023

2023/2024 TBD

Launch on Live and Work Well

Launched as part of site redesign focused on member-centric interactions

Optum | Live and Work Well

Welcome James,

As someone who works with adults and kids looking to feel better, I know it's not easy to ask for help.

This tool can make it easier to find the right support. We're going to ask you a few questions so we can make the right recommendations — and match you with the benefits and resources available to you.

Just like when I see a patient, any info you give here is confidential.

Launch on myuhc

Part of BH hub, promoted with major marketing campaign

United Healthcare

Explore all your mental health benefits >

View the benefits covered as part of your health plan.

- Coaching, counseling, and therapy to talk with son
- Courses and digital tools to support you at your ov
- Parenting and caregiving resources to support sor
- Substance use resources for help on your road to

Call Centers

Care Explorer capabilities and product descriptions available to call center agents

MyUHC Mobile App

Care Explorer and associated content available on mobile app Mental Health Hub

Providers

Ability for PCPs to deliver relevant care options directly to patients in real time

Empowering physicians to be at the heart of health care transformation

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WHAT WE'VE LEARNED

Access

Consistent, moderate traffic on LAWW, based on limited promotion; traffic away from Provider Search.

Completion

Relatively high completion rates (70-80%) given personal nature of assessment

Member Feedback

Positive usability testing on trust factor of host, ease-of-use, and relevance of questions

Opportunities

Deeper breadth of results; more personalization, addressing needs of higher acuity members; flow into provider search; engagement measure

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DOES THIS WAY WORK?

FINDS THE PRODUCT YOUR CUSTOMER NEEDS

- Find and explore dark spaces of missed opportunity
- Faster adaptation
- Zero distance to customer
- Introduces real innovation

EXTENDS BEYOND THE PRODUCT HORIZON

- Increases product sustainability
- Promotes buy-in to product value
- Improve product market fit
- Adjust to market forces

MINIMIZES THE INITIAL INVESTMENT

- Build it once is cheaper
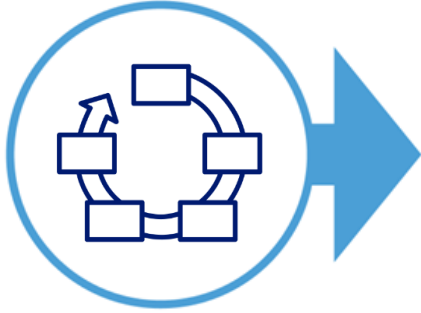- Reduces risk
- Build the right product the first time

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APPROACH SUMMARY

ASSESS · ALIGN · ACCELERATE · EVOLVE
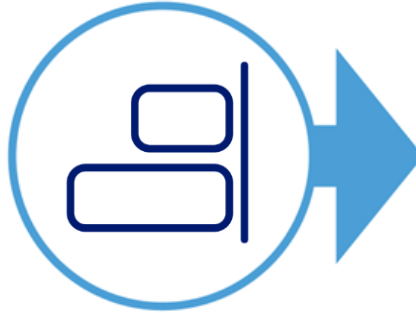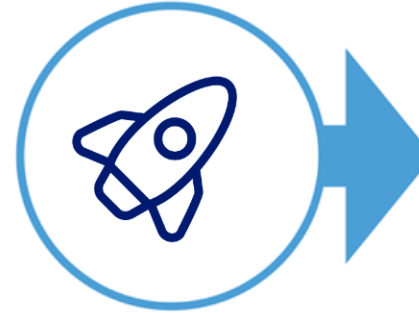
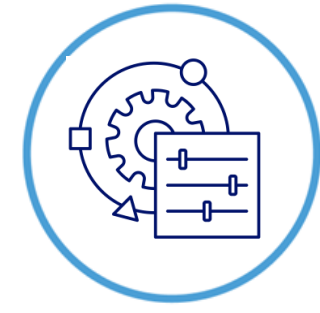|	ASSESS	ALIGN	ACCELERATE	EVOLVE
Outcomes	Clarity About the Work Ahead	Gaps Closed, Team Aligned	Remaining Pods Stood Up	Increased Maturity, Cont. Improvement
Activities & Deliverables	McKinsey Doc Review Team-Level Interviews Observing QBR Observe PO Sync Interview SMs Curate Observations with FL Director Alignment Approach SOW	Establish Detailed Training Strategy Establish CF Leadership Coaching Strat. Stand Up Change Mgmt Pod Develop Communication Plan Develop Technical Coaching Approach Evolve Product Toolkit Evolve QBR Approach Rollout Out Additional Pods Prioritized Pod Staffing/Hiring Define Tooling Standards Accelerate Details are Clarified	Apply Learnings from Alignment Rollout ~20 Pods (double-check #) Ongoing CF Leadership Coaching Ongoing Team-Level Maturity Checks Continuous Improvement – OKRs	Scale Back Team Support Team Expand the Pod Model Ongoing Team, Group & Enterprise Maturity
Duration	~3 Weeks (August)	~3 Months (Sep-Dec)	~4 Months (Dec-Mar)	Ongoing
Investment	~$45,000	~$544,000	$1.5M - $3.5M	TBD - Monthly Run Rate ~
Assumptions	1FT Product, 1FT OCM, 1PT SP	1PT Education Lead, 1FT Curriculum Development and Delivery, 2FT Product/Agile Coaches, 1PT Leadership Coach, 1FT OCM Coach, 1PT SP, 1FT Engineering Principal, 2 Apprentice Crew	Investment completely dependent on the balance of core team and pod staffing. Rate structure included in SOW and accompanying documentation.	TBD