

Transforming Healthcare CX Journey Mapping: Integrating Data for On-Demand Insights

Work Summary

I collaborated with stakeholders across teams to ensure strategic planners had access to integrated CX research and data, delivering holistic insights and enhancing our value to clients.

Timeline & Team

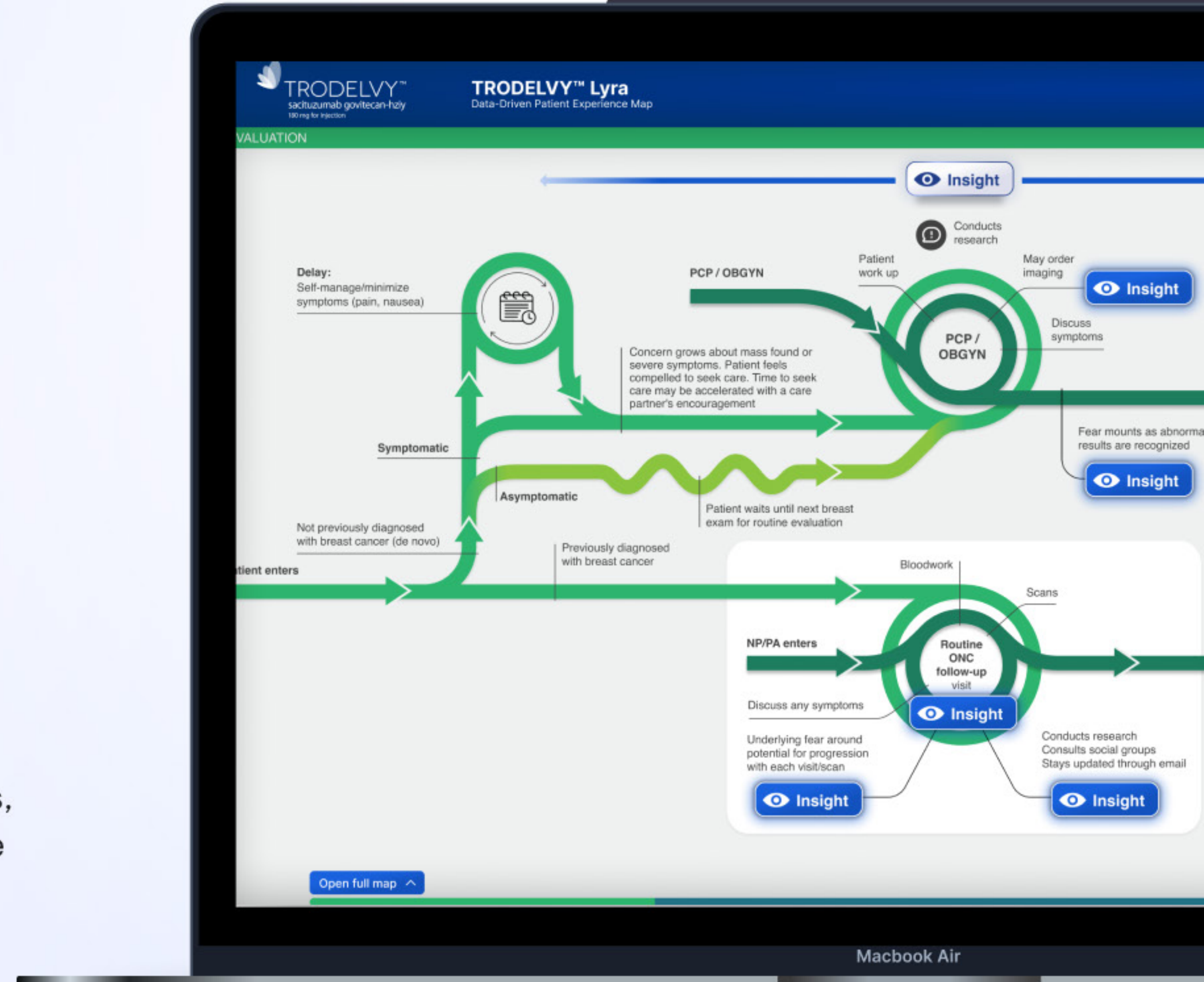
Over a span of 7 months, I collaborated with our Chief Strategy Officer, 3 CX Strategists, 2 Data Scientists, 1 Developer, 2 Product Designers, and 2 Client Teams

Responsibilities

- Stakeholder alignment
- Experience strategy
- Product design
- Rapid prototyping

Outcome

Improved access to CX insights, enabling a broader perspective for strategic marketing.



InizioEvoke Transformation is a specialized division within Inizio, a global healthcare and life sciences services company, that focuses on driving digital innovation and transformation for healthcare and life sciences clients.



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OUTCOME

Through an iterative approach, I designed 2 data-driven interactive experiences over a multi-deliverable life cycle, achieving an integrated solution that drove strategic marketing impact. The end product offered strategic planners seamless access to holistic CX research and proprietary data.



Bridged Gaps

Connected these previously siloed teams, accelerating knowledge sharing



Unified Source of Truth

Consolidated information into a single source, enabling more effective strategic alignment.

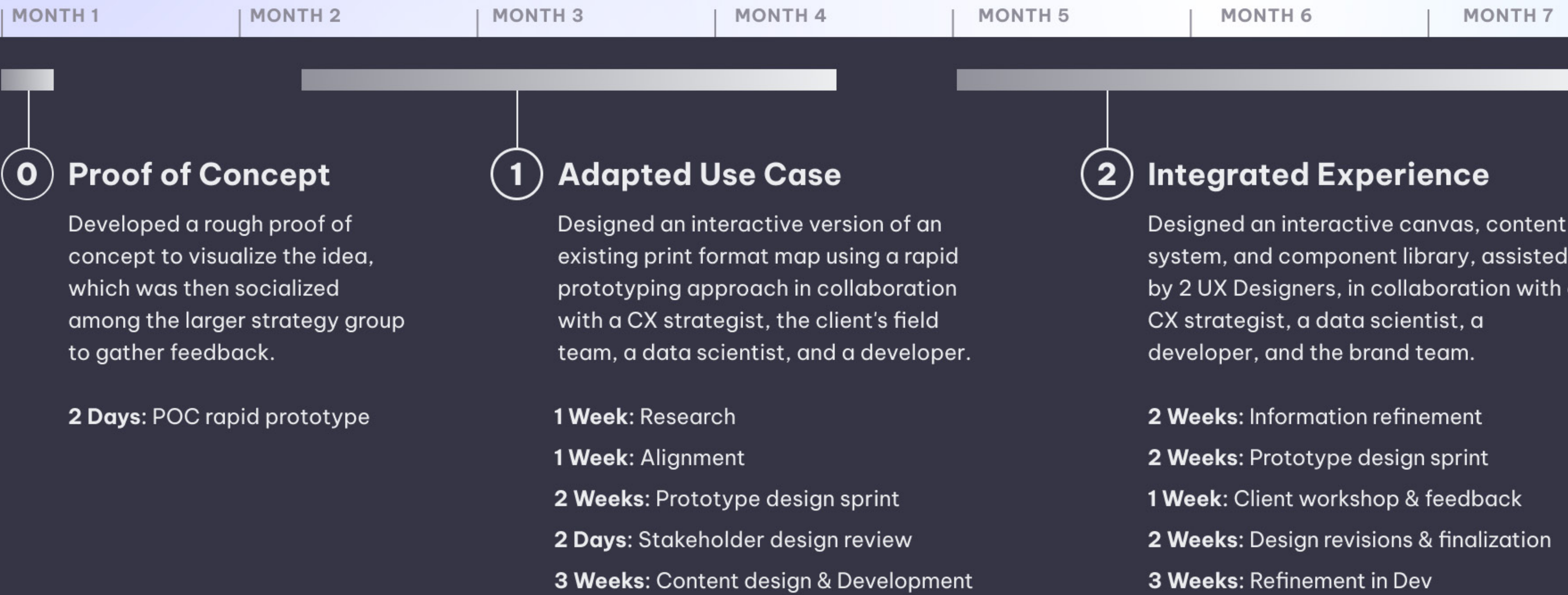


Enhanced Value

Delivered a market-leading application, boosting our value to brand leadership.

TIMELINE

Over an 7-month span, this workstream included two use cases, each iteration building on the previous one while evolving to meet unique conditions



THE PROBLEM

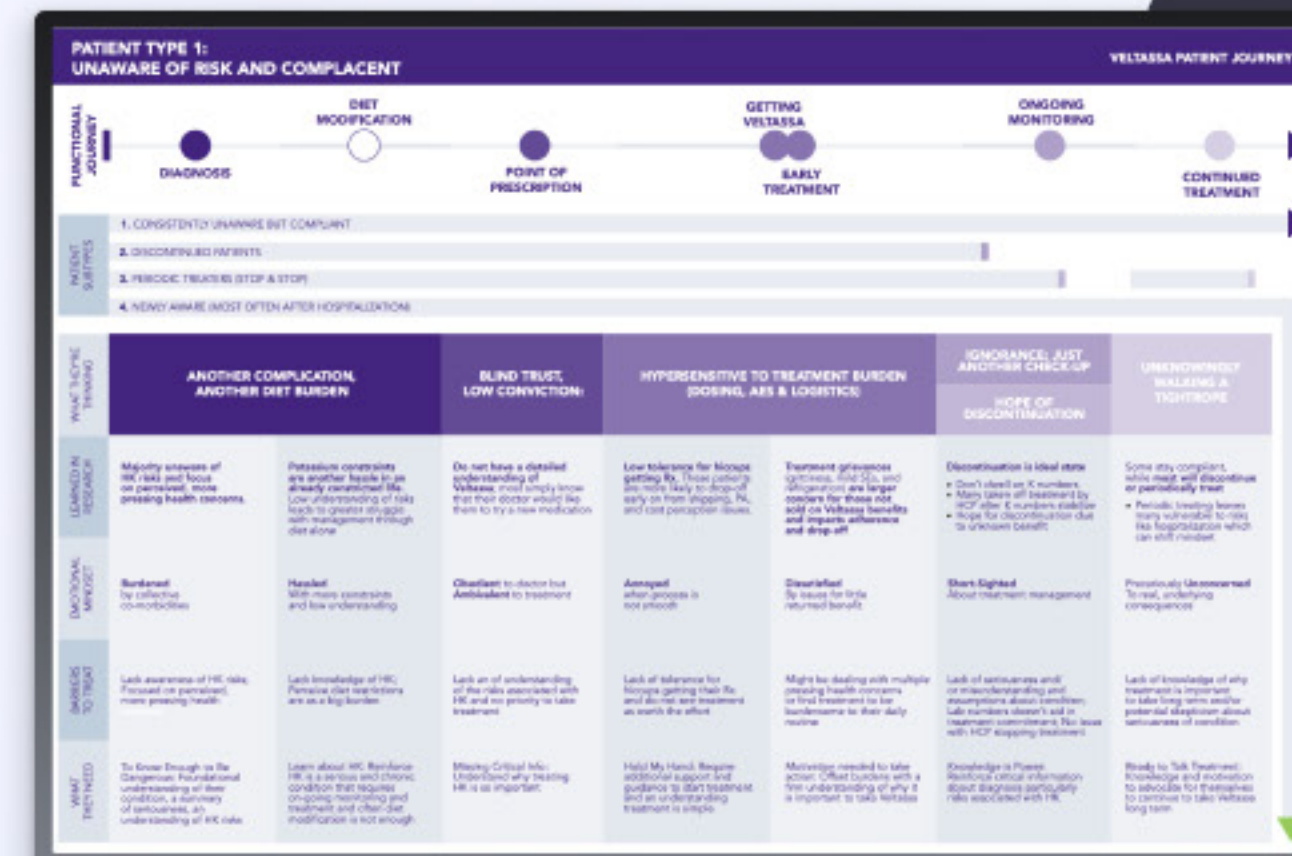
Multiple presentations on patient engagement lacked integration, leading to gaps and inefficiencies in analyzing the full patient experience.

- Agency strategists relied on **multiple presentations** delivering behavioral and attitudinal insights to understand patient engagement.
- Each presentation contained valuable data but **lacked clear integration**, making cross-referencing inefficient.
- The lack of integration resulted in **gaps and missed opportunities** when analyzing the full patient experience.

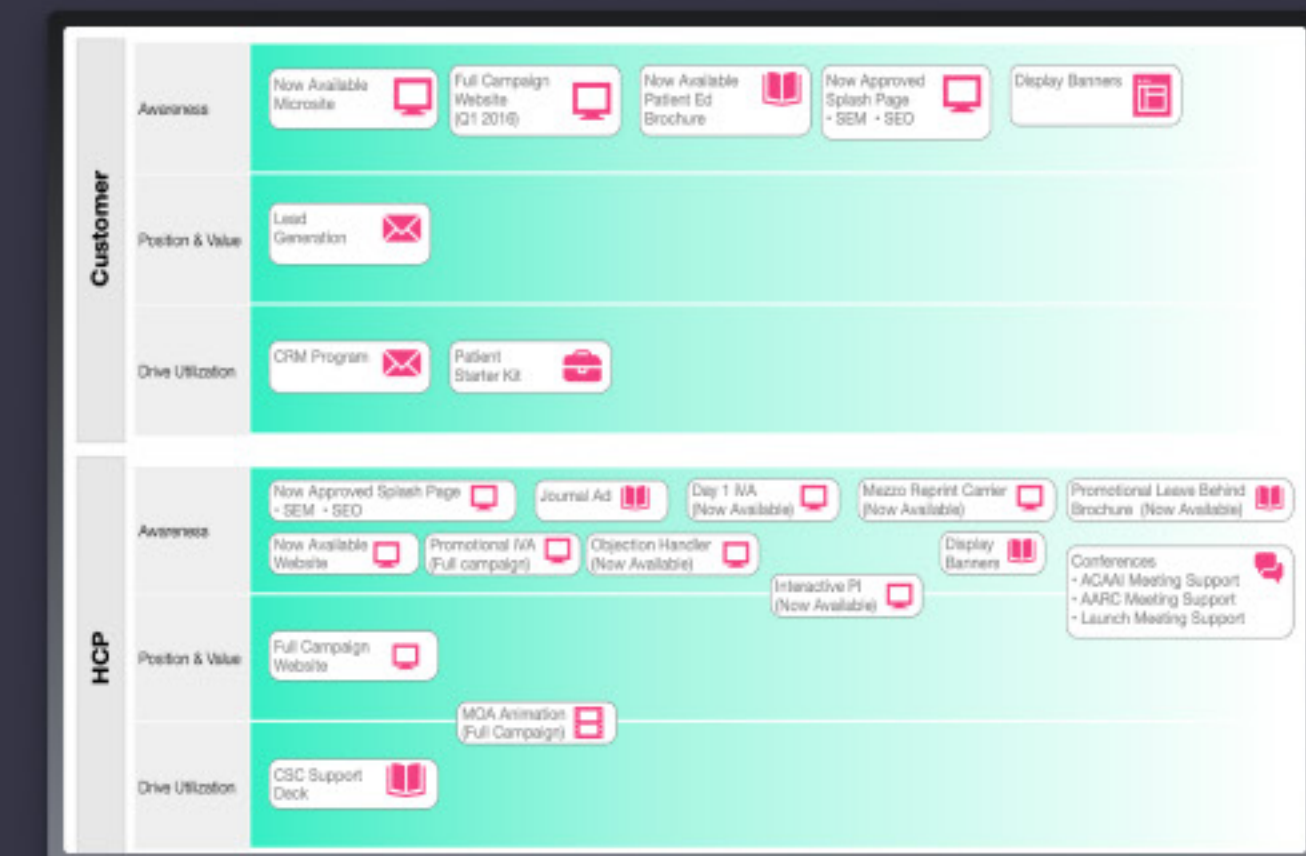
Platform Mapping



Qualitative Mapping



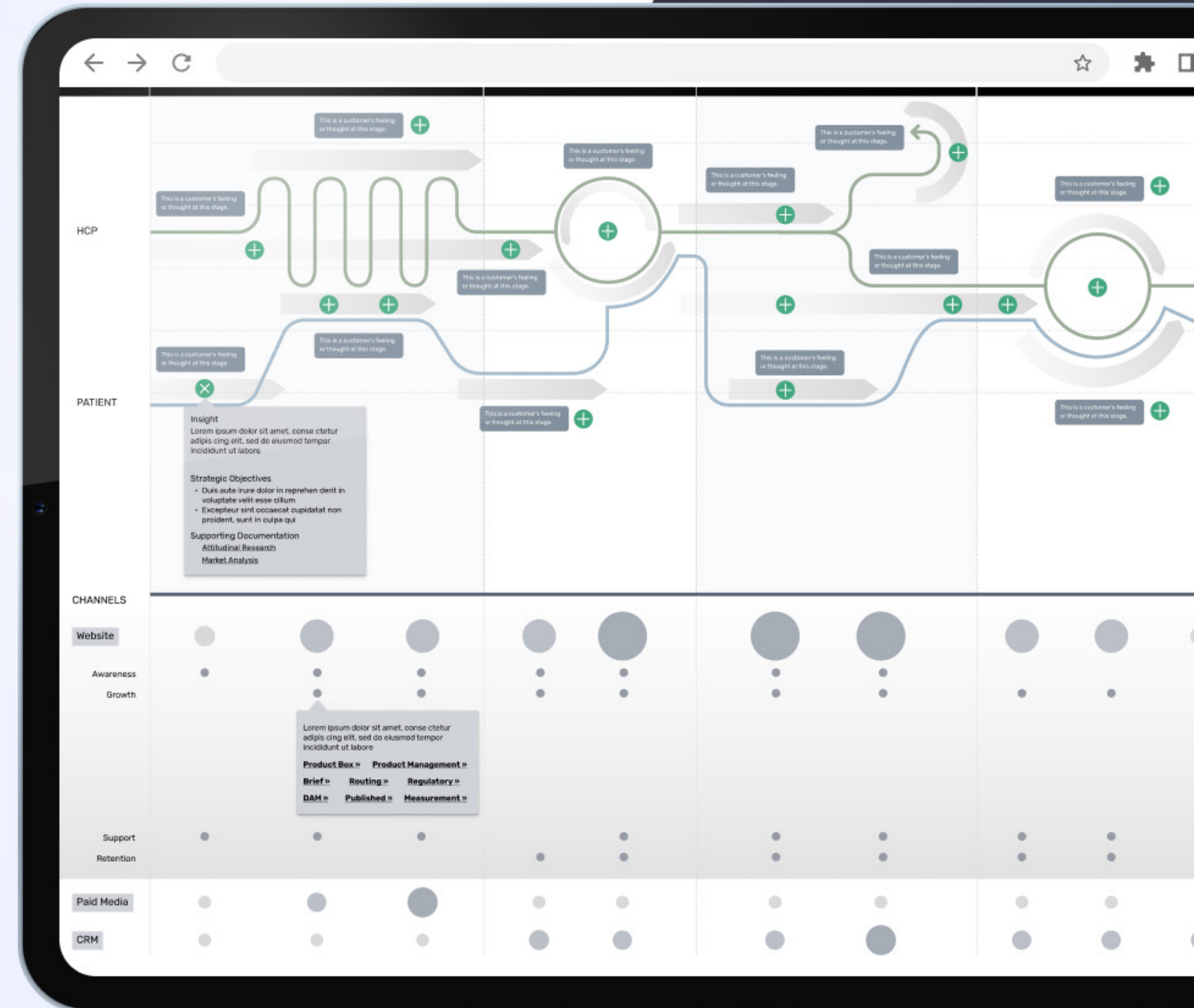
Channel Mapping



Seeing the inefficiencies firsthand, I had an idea: to draw on my experience with UX flow mapping and prototyping to create a unified, interactive tool that seamlessly integrated insights and market tactics, enabling team alignment and strategic decision-making.



Adopting a 'prototype-first' approach, I designed and built a browser-based demo as a proof of concept (POC) in just over two days to present to our Chief Strategy Officer, providing a quick, visual, and interactive example of mapping strategic tactics against behavioral and attitudinal insights.



The simple POC sparked interest within the strategy group. A CX Strategic Director proposed adapting it for a fertility client's journey mapping, leading to collaboration on an interactive digital experience.

This collaboration would evolve the prototype into a functional tool integrating patient experiences and strategic insights for real-world use.



Iteration #1

**Adapted Use Case
for Ferring Fertility**

USE CASE 1

Field reps at Ferring Fertility improvised by adapting workshop assets into small printed pages and slide decks for clinic meetings, but this approach failed to convey the intended thought leadership. Meeting with the field team advisory board and our CX strategist, I gathered key insights into their workflows and needs.

The field team had three primary requests:



Ease of Use

They wanted a simple solution whose performance they could trust.



Flexibility

Needed to be able to quickly skip around to tailor the conversation to the specific concerns of the clinic.



Data Visualization

Improved ways to present data visually, making insights more engaging and easier to understand for the audience.

I led the requirements definition, collaborating with the CX strategist and developer to ensure usability, business alignment, and feasibility.

1. Existing Map Layout:

The design needed to build on the existing print-formatted map layout.

2. Regulatory Compliance:

Content had to be approvable by regulatory reviewers.

3. Comprehensive:

The tool had to serve as an all-in-one solution, including journey details and corresponding insights.

4. Multiple Levels of Detail:

The tool had to provide various levels of fidelity, from high-level overviews to individual insights.

5. Reduce Development Complexity:

Would be delivered as browser-based coded application at a fixed size suitable for iPad Pro screens.



Unfortunately, the solution would be limited to basic touch interactions, lacking the responsiveness of native device gestures like swiping or pinching.

DESIGNING THE INITIAL HOME SCREEN

Adopting a prototype-first approach, I evolved the map design as the 'horizon,' refining negative space to frame it as a focal point. This led to the concept of 'theater mode,' where the map was given visual prominence, with the remaining screen serving as subtle 'curtains' to frame 'landmarks' and supporting content.

Key Features:

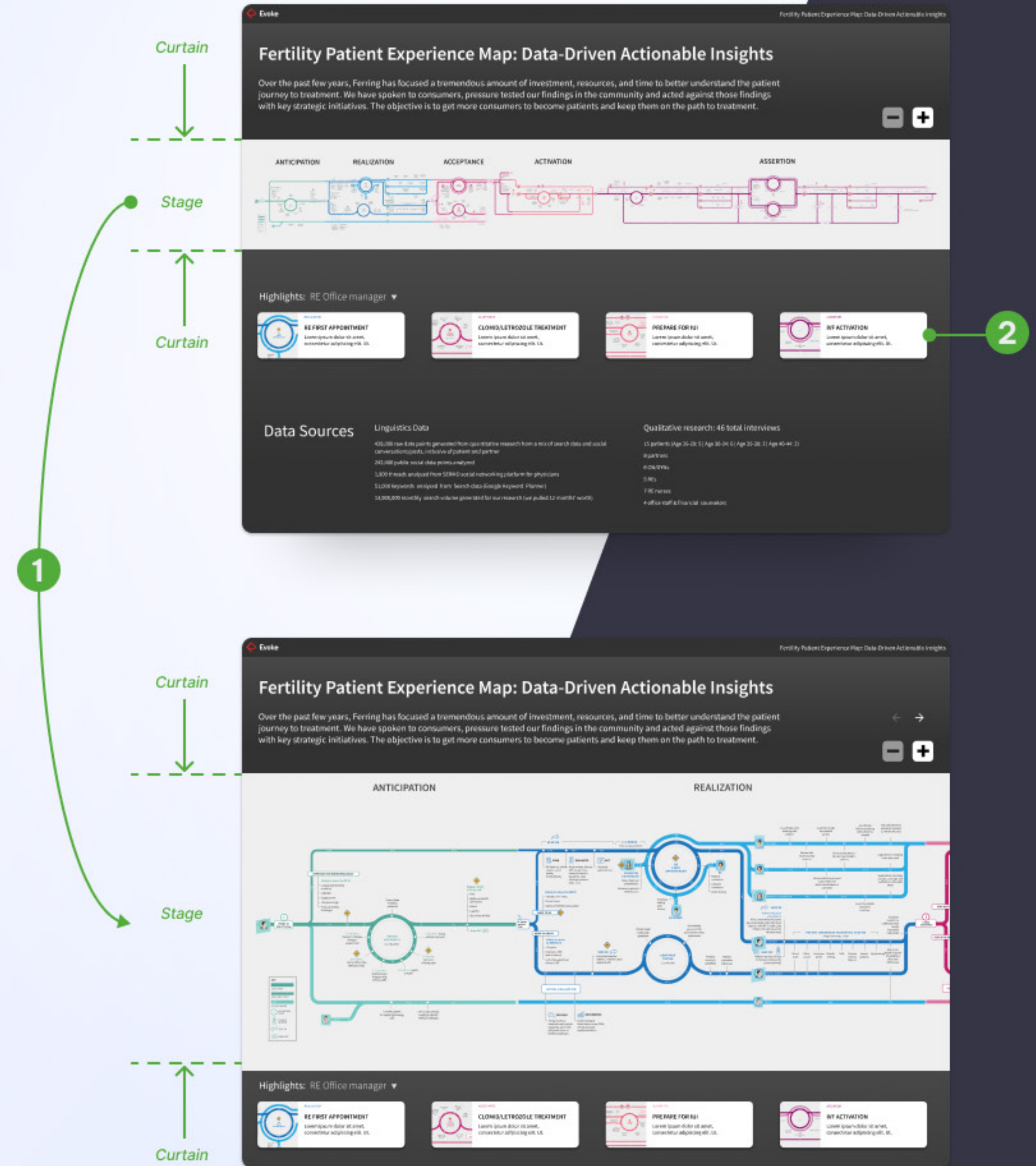
1. Incremental Zoom:

Stepped zoom functionality allowed users to enter from a broad overview and drill down into increasingly detailed phases.

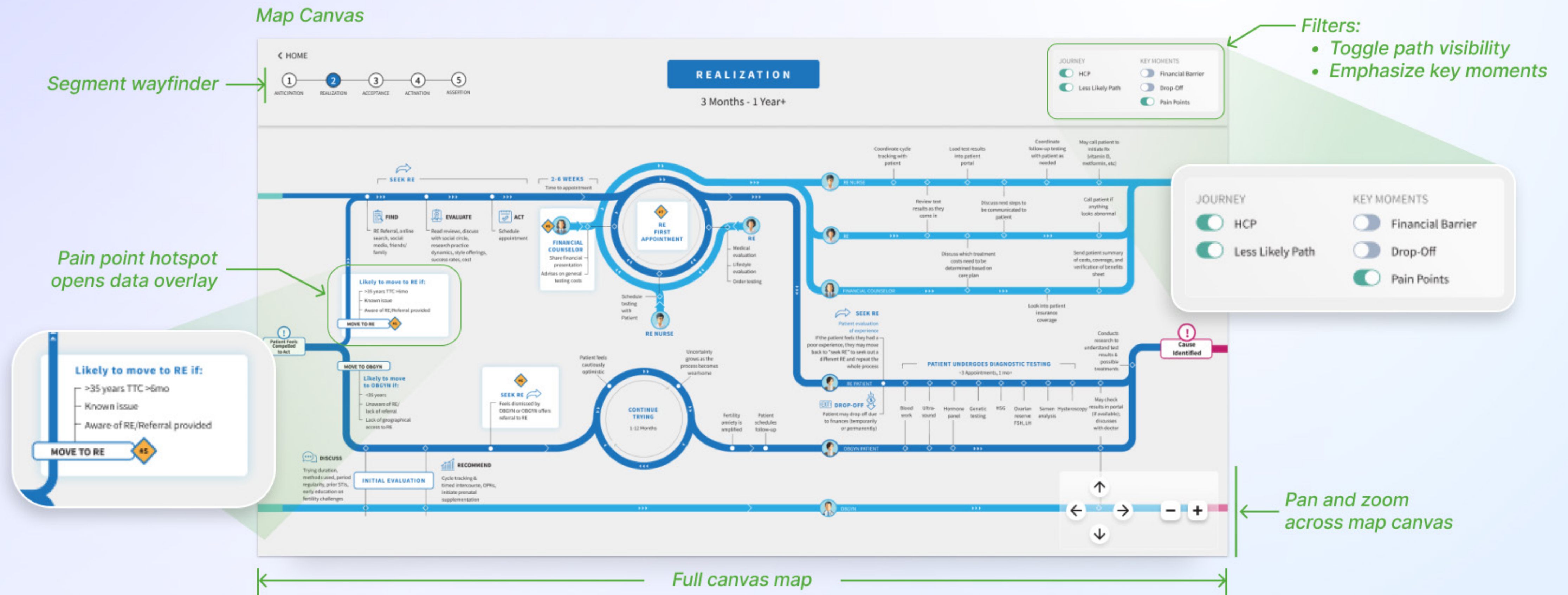
2. Core Moments:

Access to the four primary business moments was designed for simplicity, requiring just one tap to bring the reps directly to critical insights.

Throughout this quick three-day iteration, I worked closely with the CX strategist to align on the best way to maintain visual focus while ensuring practical usability for field reps.



My approach to designing the canvas prioritized maximizing the journey map with minimal interface elements. The map included on-demand features that allowed reps to toggle content, dynamically highlighted relevant details and dimming others.



DETAILING PAIN POINTS

With the canvas in place, I proceeded to pain point insights. To maximize real estate ensure seamless map-insights interaction, I implemented hotspots that open overlays, providing a comprehensive view of each journey moment.

Pain Point Detail Overlay

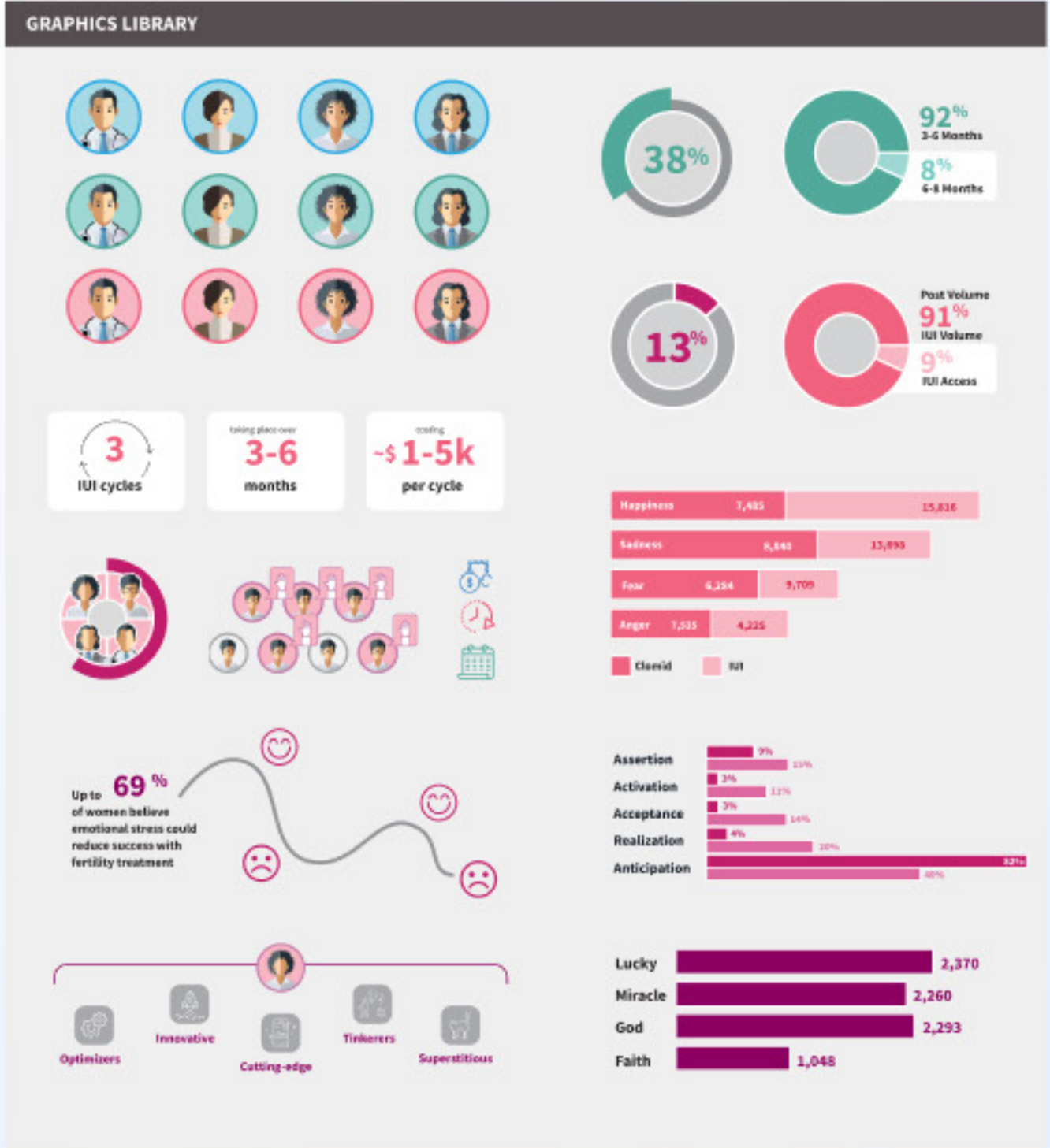
Strategic insight

Selected quotes from qualitative interviews

Qualitative data



The overlay featured conversational evidence—including quotes from patients and healthcare providers—combined with real-world data visualizations to deliver a balanced perspective of human experiences, supported by quantitative proof.

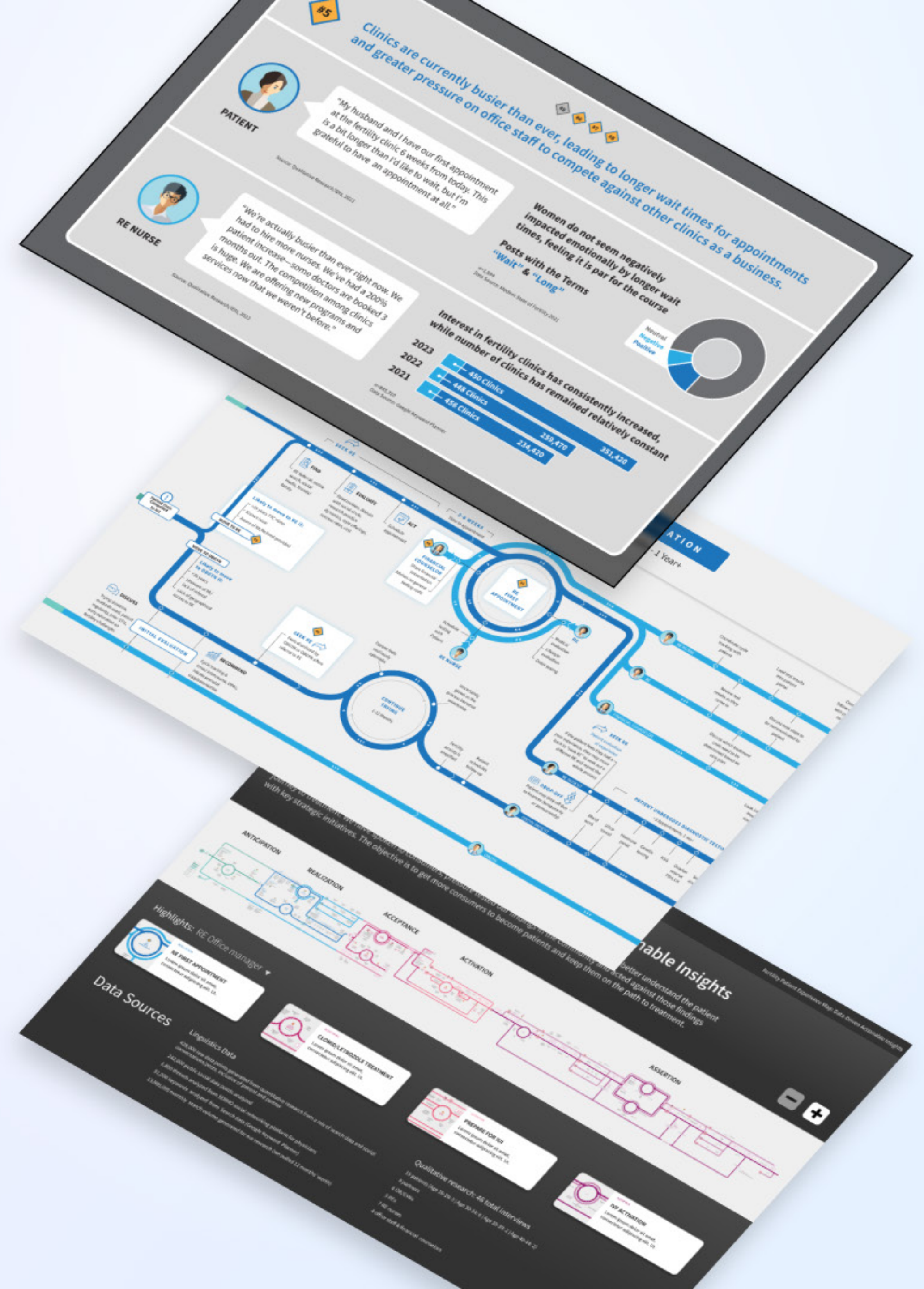


Supporting quantitative data with custom data visualization

DELIVERY

Approval was secured, visual and interaction design finalized, and version 1 of the map was deployed for in-market testing

- Concluded the initial design sprint with a Figma prototype shared with the field user advisory board, securing approval to proceed with content design and development.
- Finalized visual assets and prepared them for regulatory review while collaborating with the developer to ensure all requirements were met, maintaining the project timeline.
- Received minimal feedback from stakeholders and regulatory reviewers, preserving the original design approach and enabling deployment of version 1 for in-market testing.



Achieved early success with positive user feedback while establishing a clear path for future development and strategy.

Initial Outcomes

Positive Reception

Field reps found the tool easy to use, cohesive, and effective in delivering thought leadership.

Touch Interface was Just OK

Reps adapted to the simplified touch interface but encountered awkward moments using unavailable gestures.

Next Steps

A 3-month review workshop was scheduled to plan the product's next phase.

Learnings to Carry Forward

Earlier Collaboration Leads to Better Outcomes

Earlier collaboration could have shaped map assets to fit interaction design, creating a more user-friendly experience.

Constructive Stakeholder Feedback is Crucial

Stakeholders' hands-off approach expedited approvals but lacked critical feedback which would have helped elevate the design beyond "good enough."

Extensive Interface History is Valuable

My interface experience overcame limitations and unlocked new opportunities.

Iteration #2

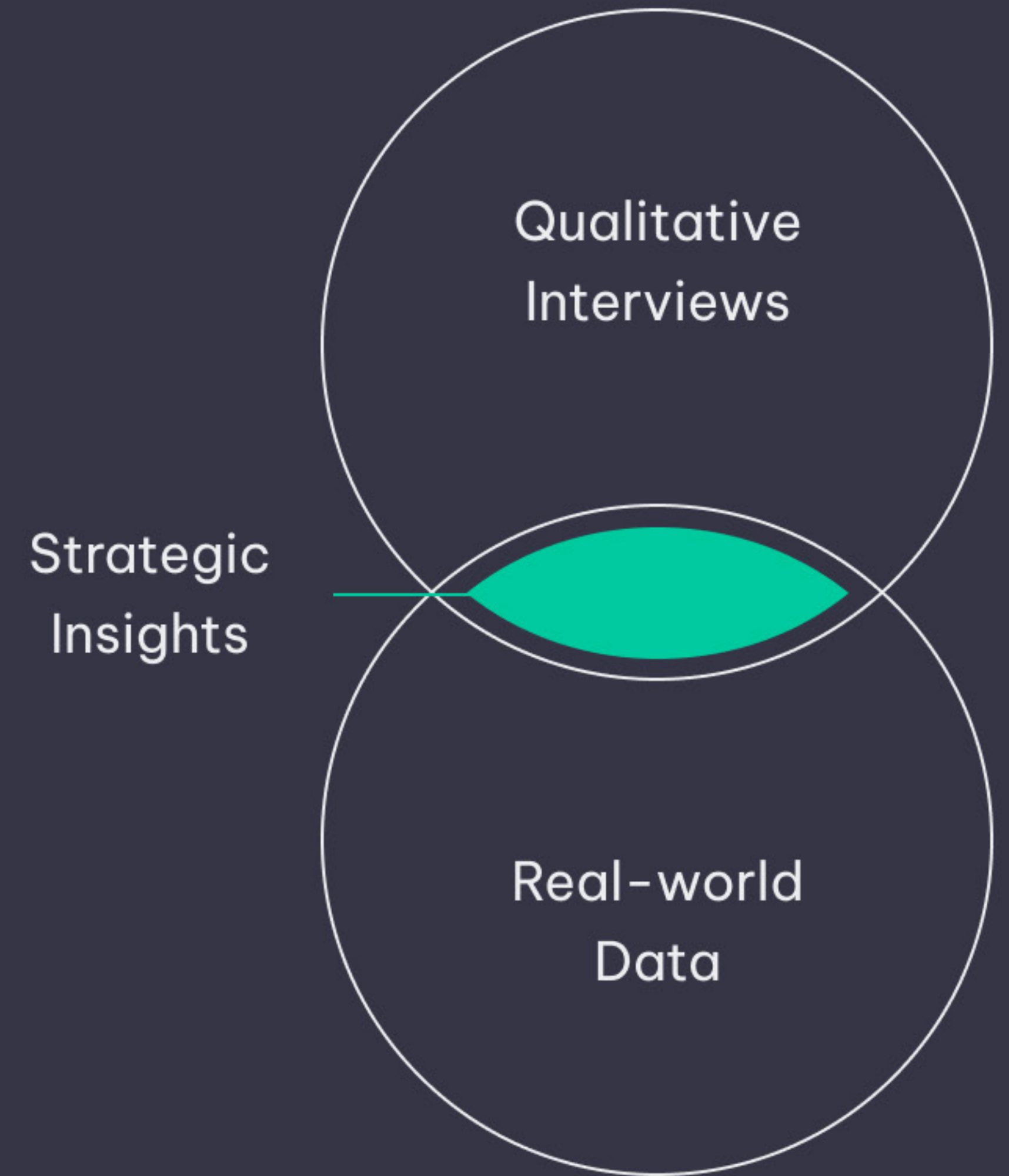
Integrated Experience

Internal enthusiasm around the Ferring initiative sparked interest in adding a rapid digital-first option to an existing work stream.

USE CASE 2

This iteration delivered a collaboration between CX and Data teams, creating an integrated map of the breast cancer patient journey that offered valuable insights to shape marketing strategy.

- The map would feature insights created by capturing emotional perspectives from patient interviews and behavioral information from real-world digital data.
- The product would enable marketing teams to make informed, strategic decisions from a cohesive new of synthesized insights and supporting data.



We adapted the core design principle to meet the expanded scope addressing broader use cases spanning from workshops to self-guided learning. This increased scope was compounded by the challenge of refining early data reports to align with patient insights.

- This iteration was digital-first, prioritizing speed and innovation to ensure it was ready for initial use during annual brand planning.



Broader Use Cases

Adapt the journey map for workshops, individual sessions, and digital workstations.



Data Refinement

Refine the rough draft data to align it effectively with patient insights.



Digital-First Design

Create a cohesive, native experience without constraints from previous versions.

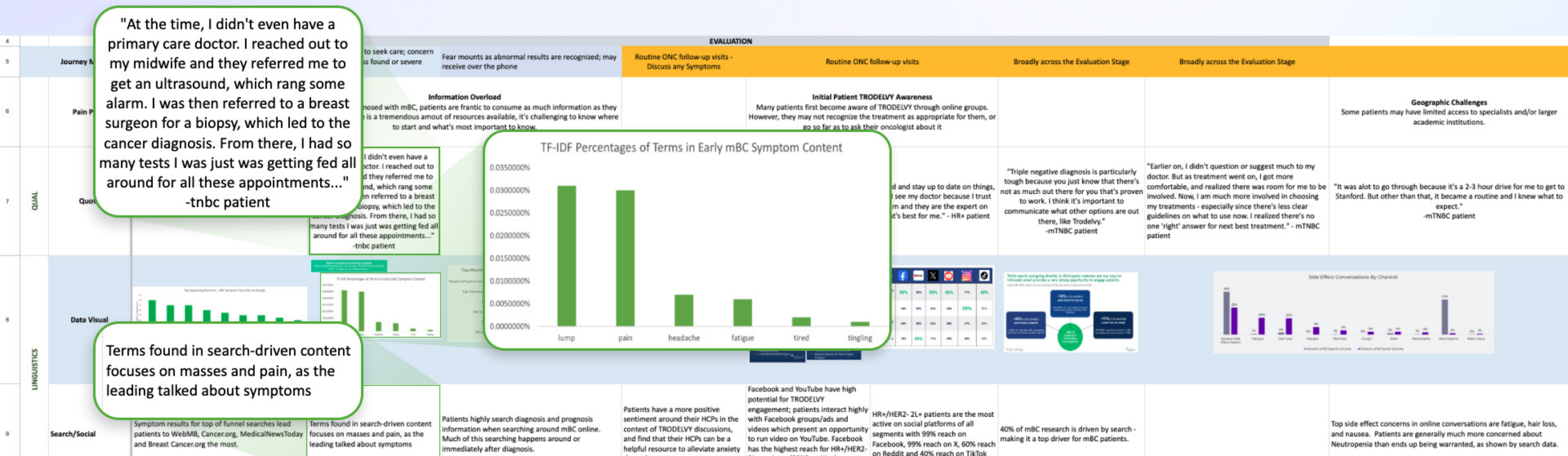
I started by gathering raw information—interviews, journey maps, and spreadsheets—then refined the data component to support effective collaborative analysis.

Data Refinement with ChatGPT

Played a crucial role in refining raw data, categorizing journey points, identifying data gaps, and suggesting queries, enhancing initial data processing.

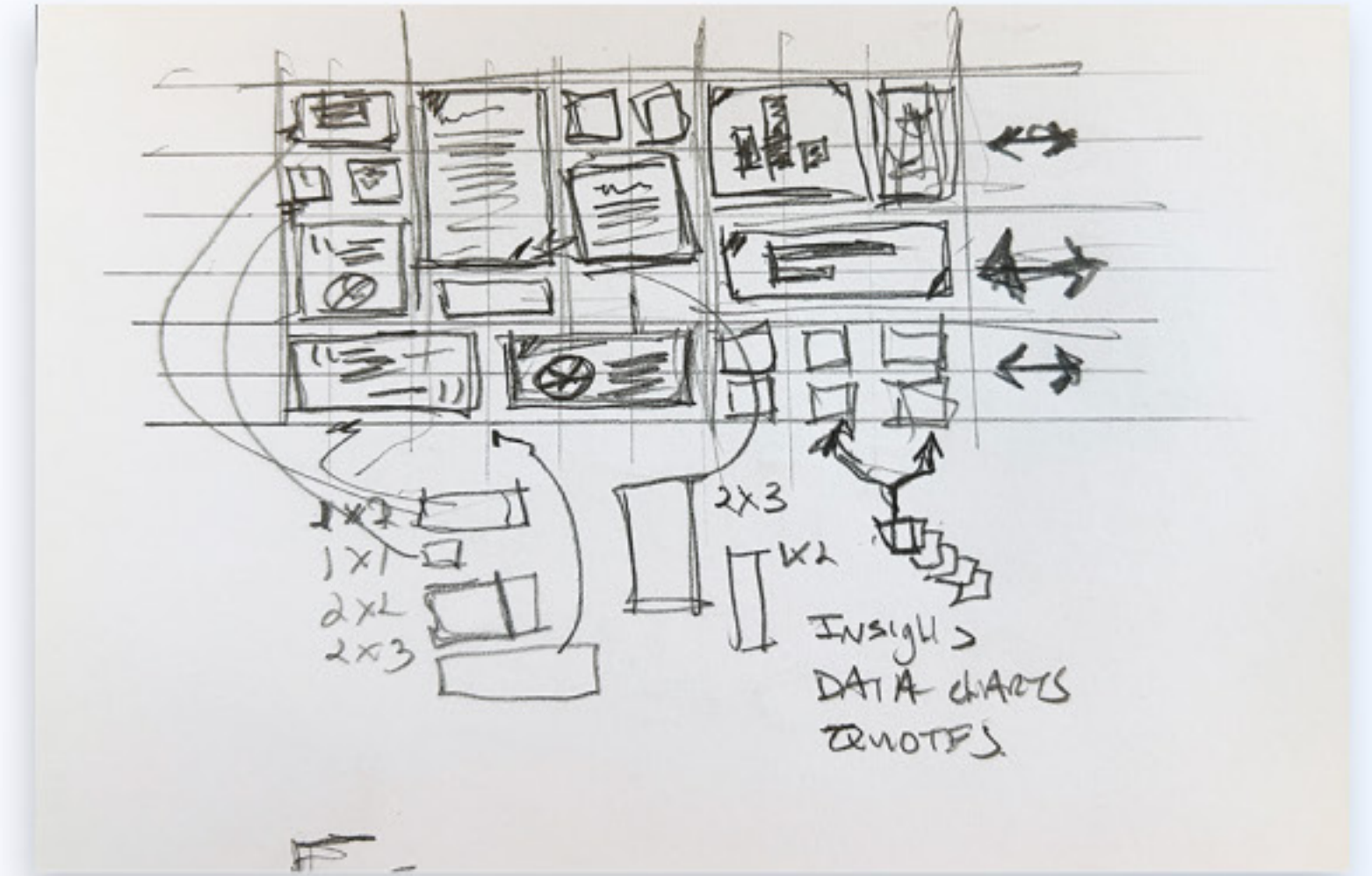
Validation and Iteration

Collaborated with CX and Data teams across three rounds of iteration, validating and aligning output with journey steps and interview insights to achieve a 98% correlation.



Next, I collaborated with our developer, aligning on a scalable, database-driven modular solution that allowed for flexible information presentation.

- Content would need to be dynamically presented, allowing for multiple programmatic scenarios
- Modules would feature a standardized design language, but would be unpredictable in length.
- Structure would need to be scalable, incorporating future, unidentified content types.



Ideation on organizational approaches

To meet a tight 2-week timeline, I employed an iterative approach, dividing the design into interconnected sprints for Map Components, Card Components, Content Organization, and Canvas Interactions.

- Progress in one area often required revisiting and adjusting others.
- A balanced progress was challenging, requiring design compromises along the way.
- Through flexible iteration and frequent check-ins with CX, Data, and Dev, I managed the complexities and ensured forward progress.



Map Components

Built a lightweight component library.



Card Components

Created scalable, modular content cards.



Organization

Explored and refined content integration



Canvas Interactions

Interactive access to journey and content

MAP COMPONENTS

Created a lightweight component library of vector paths to lay out the journey map, significantly improving performance and enabling rich interactivity.

Modular Component Design

The map was built using 18 lightweight, modular components, enhancing usability for the developer and allowing for smooth adjustments without lag.

Efficient Collaboration

The approach facilitated effective collaboration with the CX Strategist, aligning strategic vision with technical needs

Digital-First Advantage

The modular design ensured the journey map was responsive, efficient, and adaptable

MAP ATOMS

Base Piping

Line/
Horizontal



Line/
Vertical



Circle/
Closed



Elbow/
Standard



Pointers

Arrows/
Orthogonal



Arrows/
Circular



Elbows

Elbow/
Standard Extended



Elbow/
Wide



Elbow/
Tight



Elbow/
Semicircle



Junctions

Lane Switch/
Multi Short



Lane Switch/
Multi Long



Circle Transfers

Circle Transfer/
Tight



Circle Transfer/
Long



CARD COMPONENTS

Designed modular, interchangeable cards to support a scalable and flexible content system.

Modular Content Design

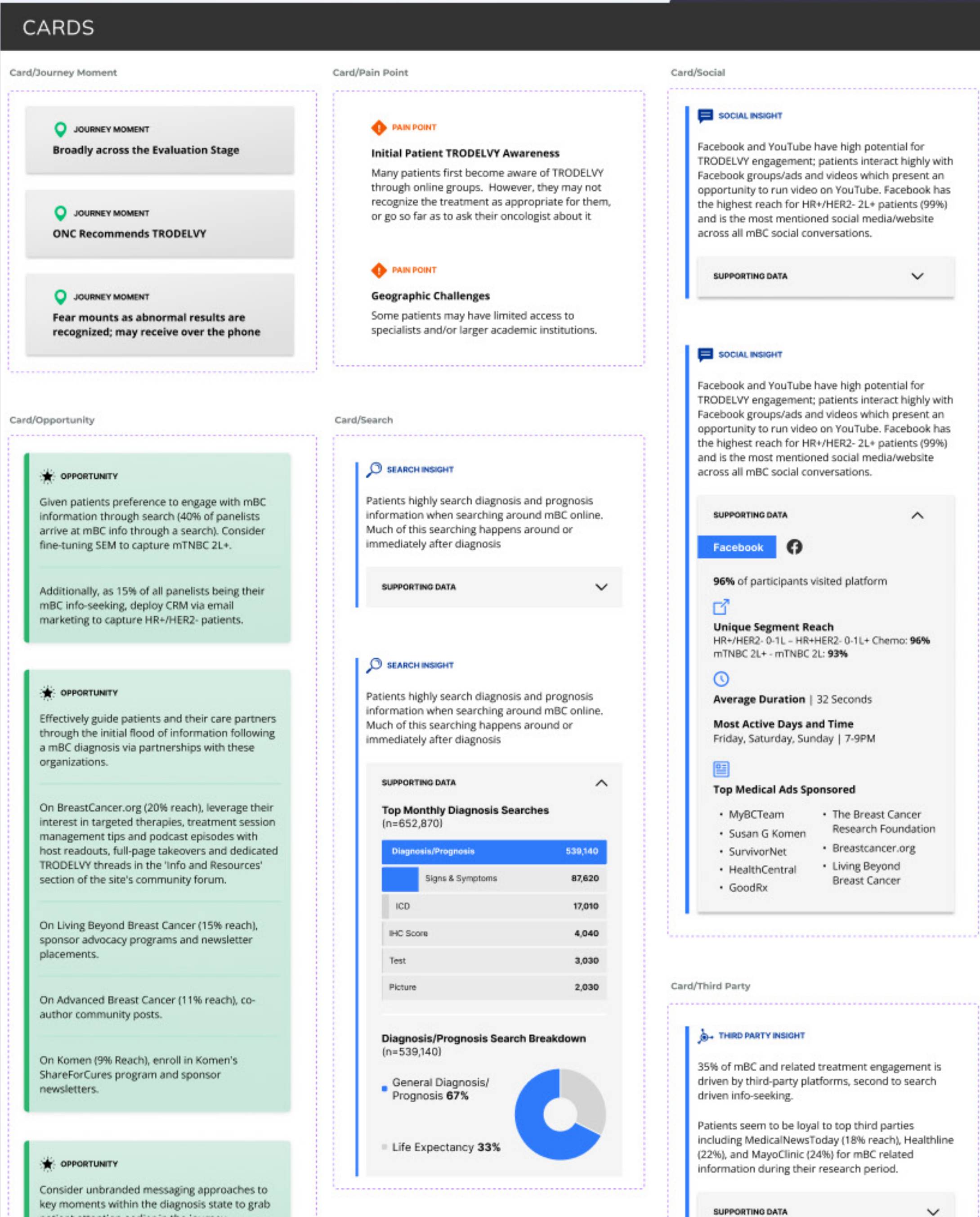
The content cards featured a clean, modular design, simplifying content categorization while maintaining flexibility and scalability for future updates.

Cross-Team Collaboration

Close collaboration with CX, Data, and Dev teams ensured the design system delivered content effectively and met tight development deadlines.

Iterative Refinement

Through multiple review cycles, the content cards were refined to meet project needs and align with the intended visual style.



ORGANIZATION DESIGN

Identifying a stackable, feed-like approach became the most scalable solution for integrating content with the journey map.

Initial Design Approach: FAIL

Began with a dashboard-style that maximized screen availability but proved difficult to dynamically scale.

Adopting a Feed-Like Model

Switching to a stackable, feed-like design streamlined content organization, functioning as an advanced bullet list.

Simplified Sequencing

The feed model allowed the CX Strategist to easily sequence content cards, aligning with the Opportunity, Insight, and Supporting Data framework.

JOURNEY MOMENT

Broadly across the Evaluation Stage

Initial Patient TRODELVY Awareness

Many patients first become aware of TRODELVY through online groups. However, they may not recognize the treatment as appropriate for them, or go so far as to ask their oncologist about it

Given patients preference to engage with mBC information through search (40% of panelists arrive at mBC info through a search). Consider fine-tuning SEM to capture mTNBC 2L+.

Additionally, as 15% of all panelists being their mBC info-seeking, deploy CRM via email marketing to capture HR+/HER2- patients.

SOCIAL INSIGHT

Facebook and YouTube have high potential for TRODELVY engagement; patients interact highly with Facebook groups/ads and videos which present an opportunity to run video on YouTube. Facebook has the highest reach for HR+/HER2- 2L+ patients (99%) and is the most mentioned social media/website across all mBC social conversations.

40% of mBC research is driven by search - making it a top driver for mBC patients.

Email is also a top driver to mBC information for patients, with over 15% of patients arriving to mBC information (articles, videos, etc.) directly from an email.

THIRD PARTY INSIGHT

35% of mBC and related treatment engagement is driven by third-party platforms, second to search driven info-seeking.

Patients seem to be loyal to top third parties including MedicalNewsToday (18% reach), Healthline (22%), and MayoClinic (24%) for mBC related information during their research period.

mBC & Treatment Information Consumption

~40% of all panelists came from a search mTNBC 2L+ lead their mBC info-seeking with search more than any other segment

~35% of all panelists went direct to source - HR+/HER2- 2L+ over indexes on source Loyalty, going directly more than other segments

~15% of all panelists came from an email

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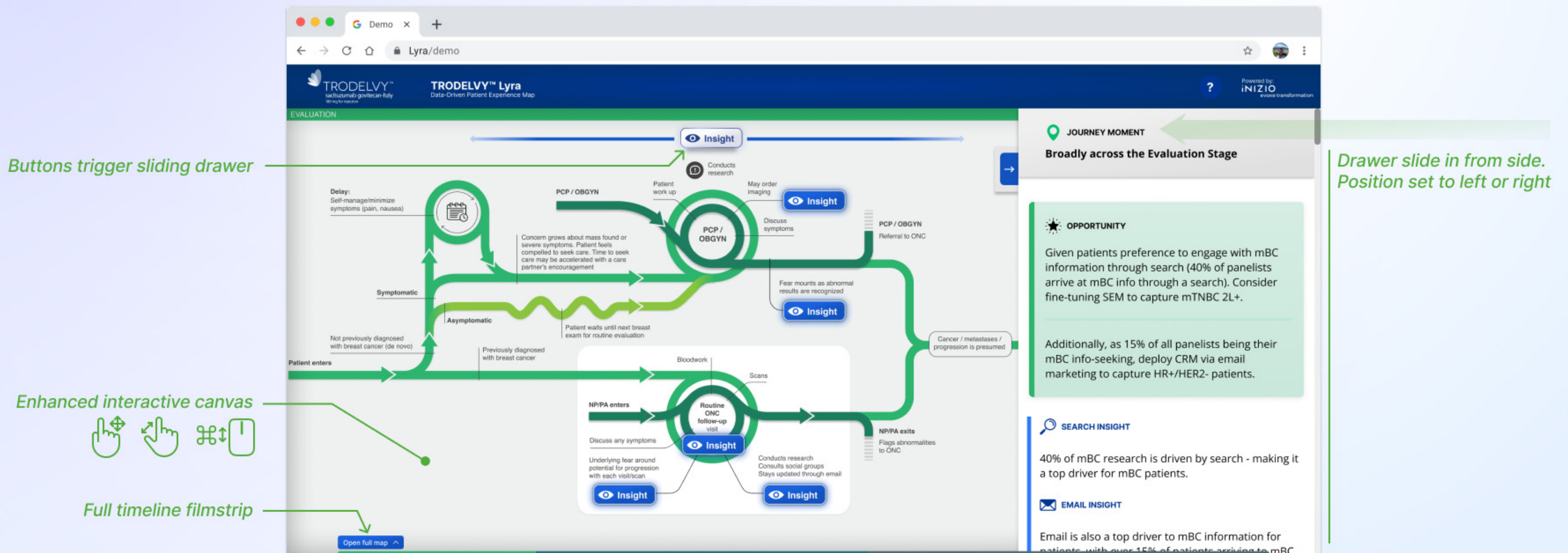
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CANVAS INTERACTION

The canvas interactions were designed to allow access to patient journey moments and supporting information together. Icon buttons were used as landmarks, triggering a sliding drawer that revealed the content feed, creating a seamless and accessible user experience.



With the initial prototype design established, I led remote workshop sessions with our internal client partners and client brand managers. Excited by the current direction, we aligned to move forward while identifying 1 must have and 2 future state additions.

Must Have

Orientation Screen

- Provide an overview of the tool's purpose and usage.
- Explain specific contexts where the tool is most effective.
- Use video game intro screens as inspiration for an engaging introduction.

Future State Additions

Filtering Capability

- Allow users to filter the map and information based on specific queries.
- Enable targeted exploration of content to support individual user needs.
- Improve precision in navigation and data access.

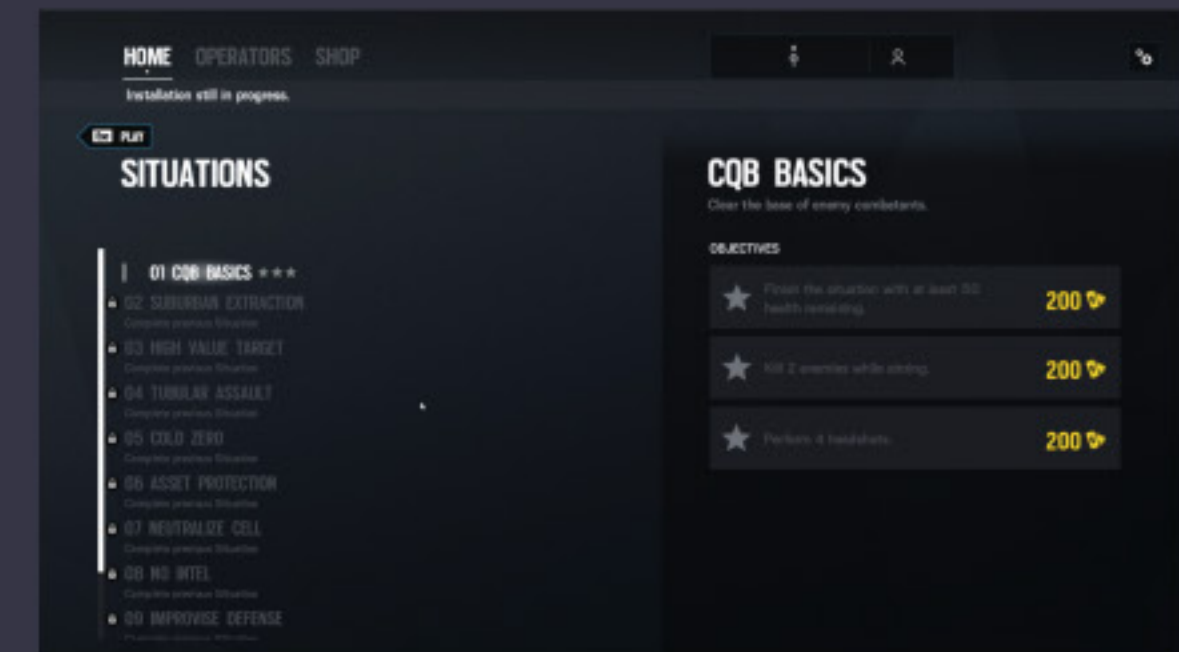
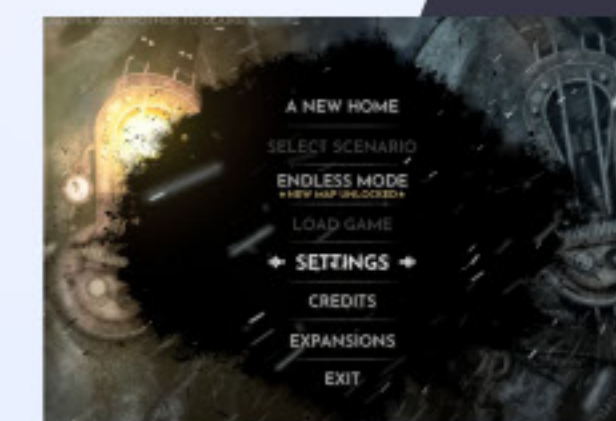
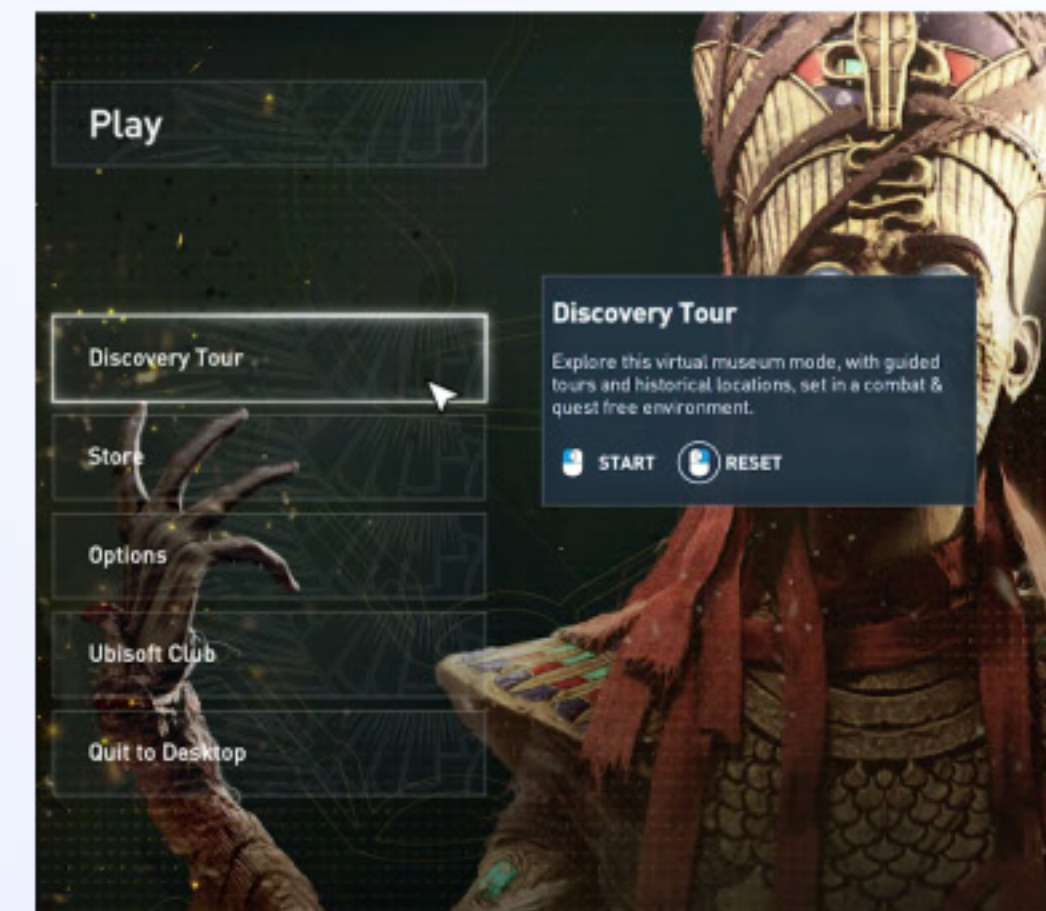
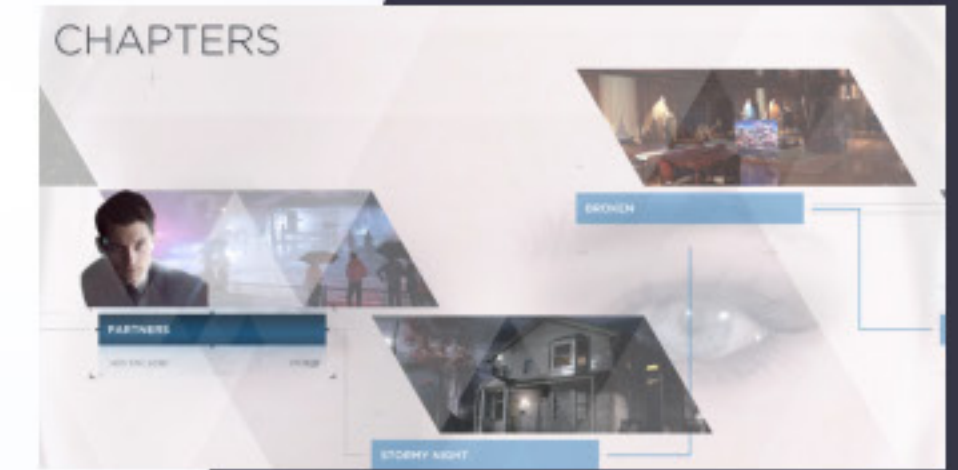
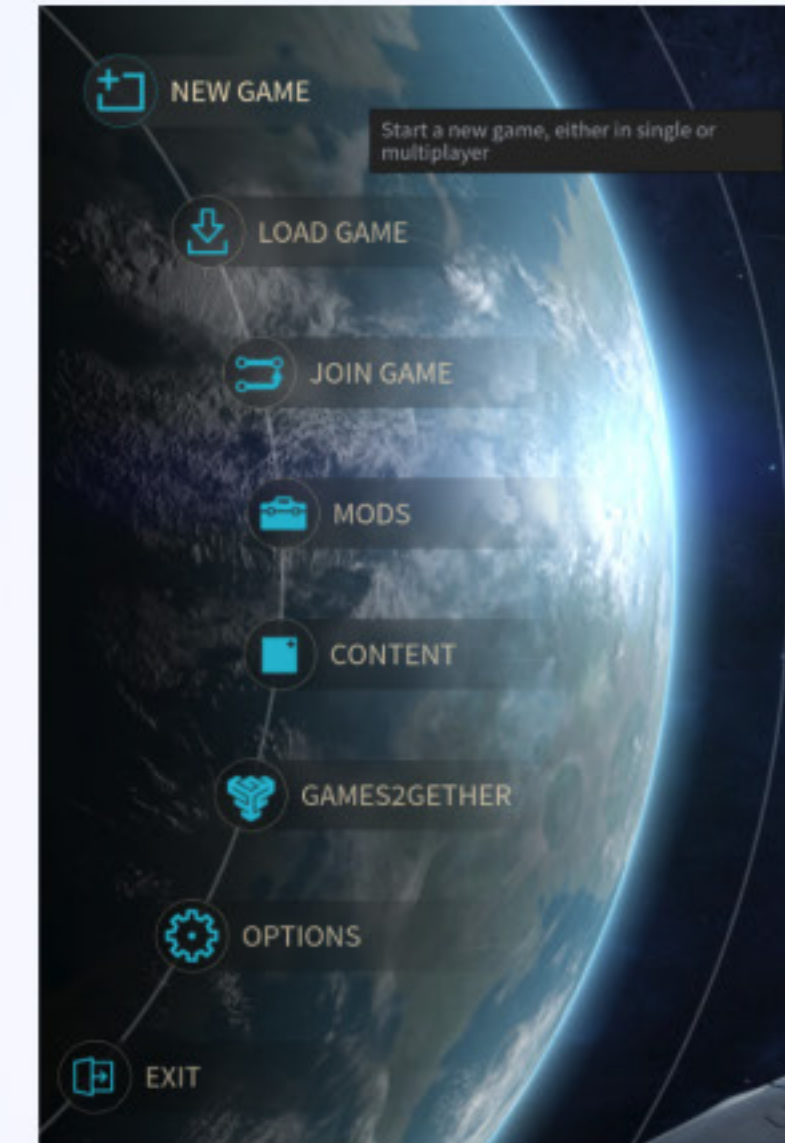
In-Market Tactics

- Integrate in-market tactics directly with journey moments.
- Display metrics to evaluate the effectiveness of marketing tactics.
- Provide insights into campaign performance and impact.

ORIENTATION SCREEN

With the additional request, I refocused on designing the orientation screen, inspired by gaming menus, to deliver a quick-entry welcome and user guide.

- Conducted a review of various game interfaces, focusing specifically on introduction and menu screens, identifying menu screens as the most relevant starting point.
- Collaborated with the internal team to draw inspiration from selected game menu screens, determining the optimal approach for the orientation design.



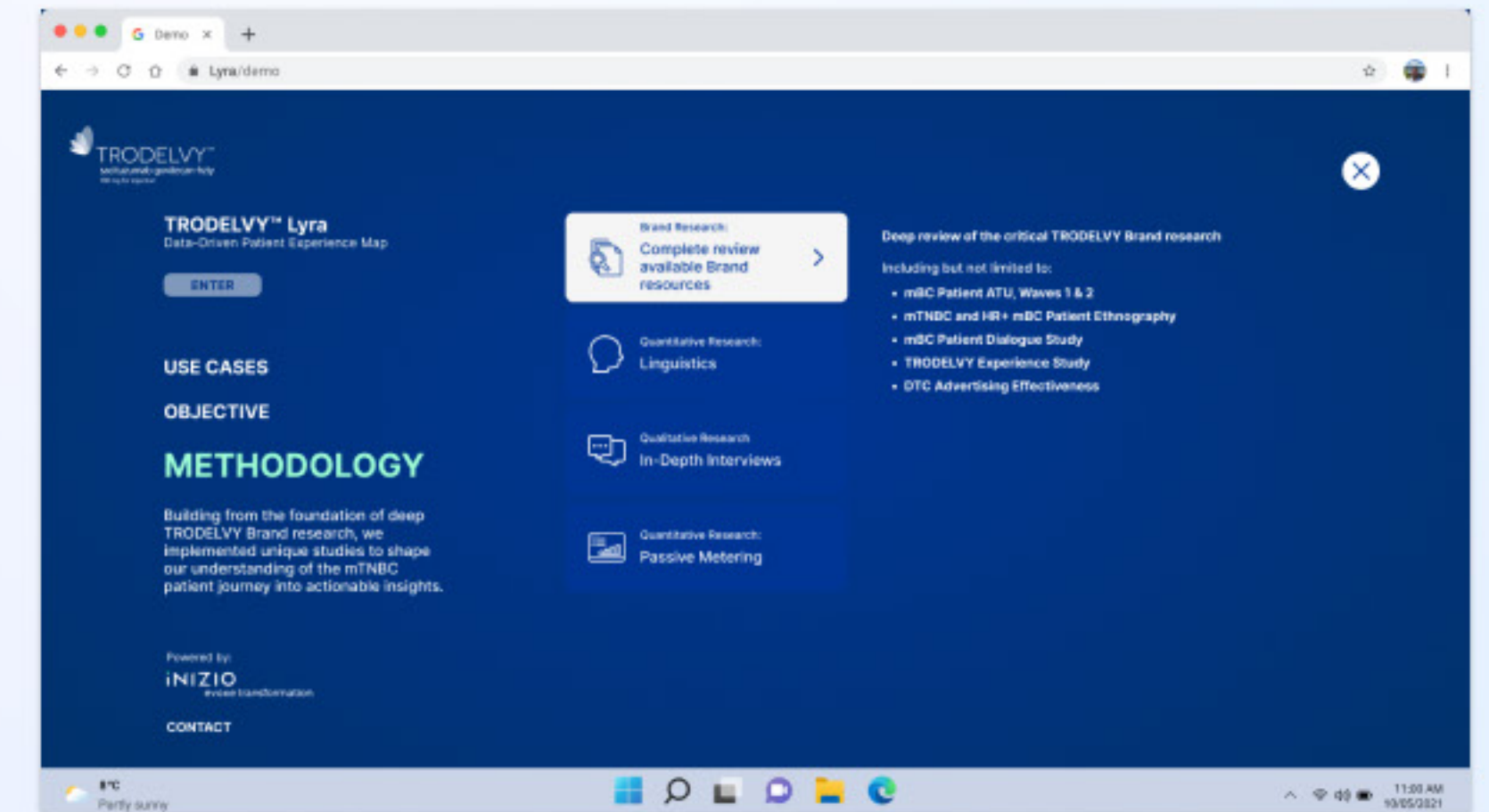
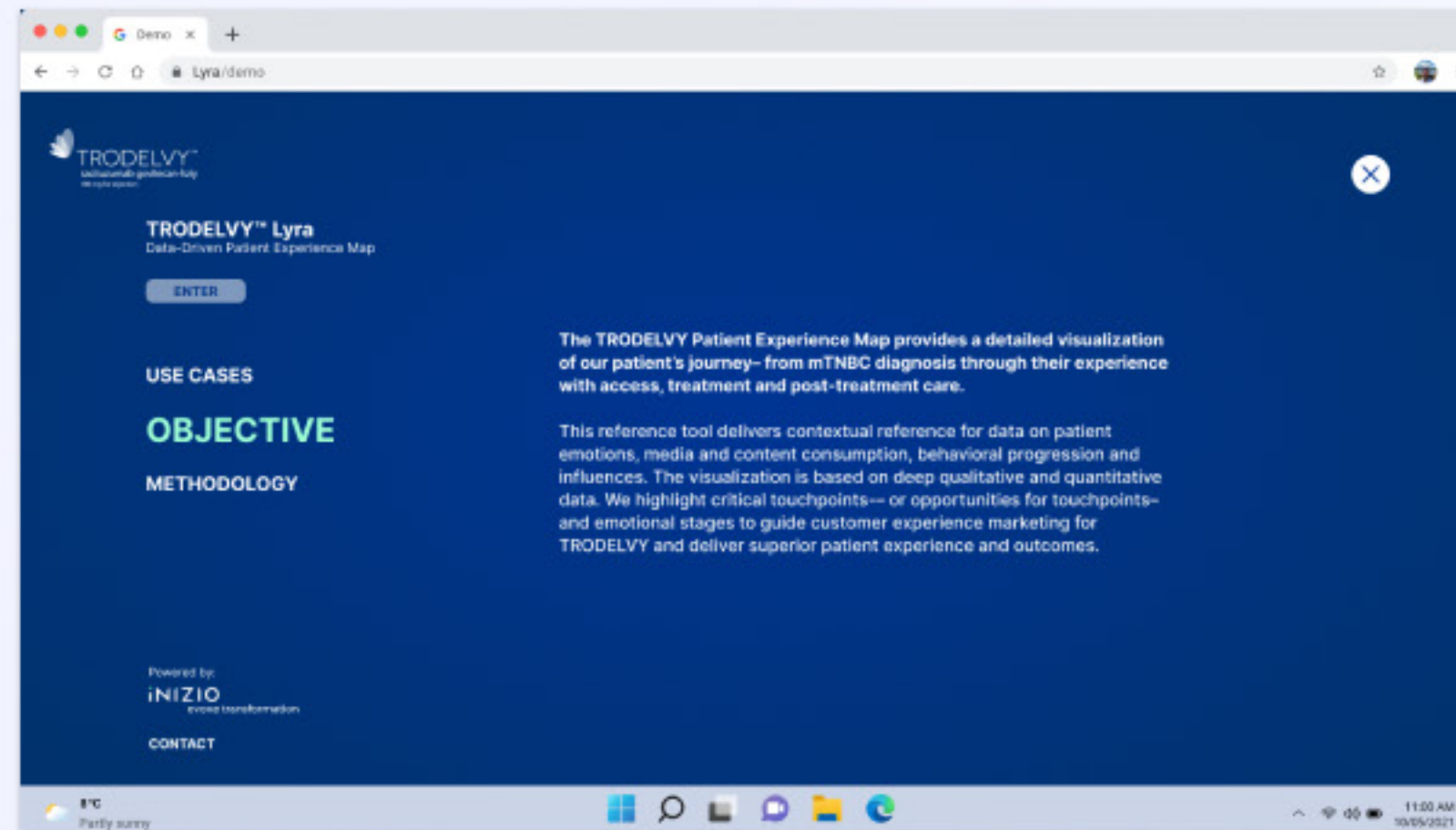
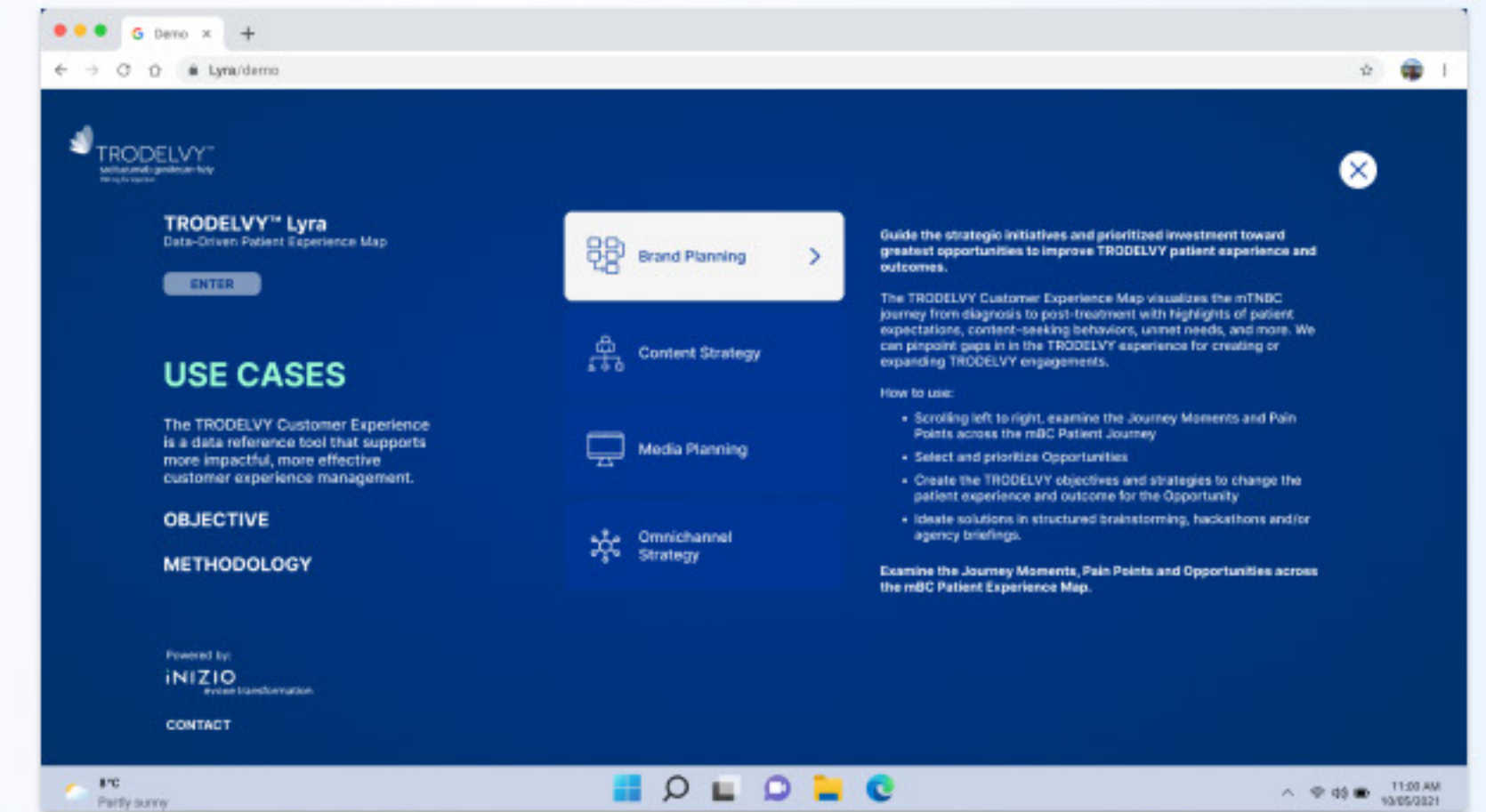
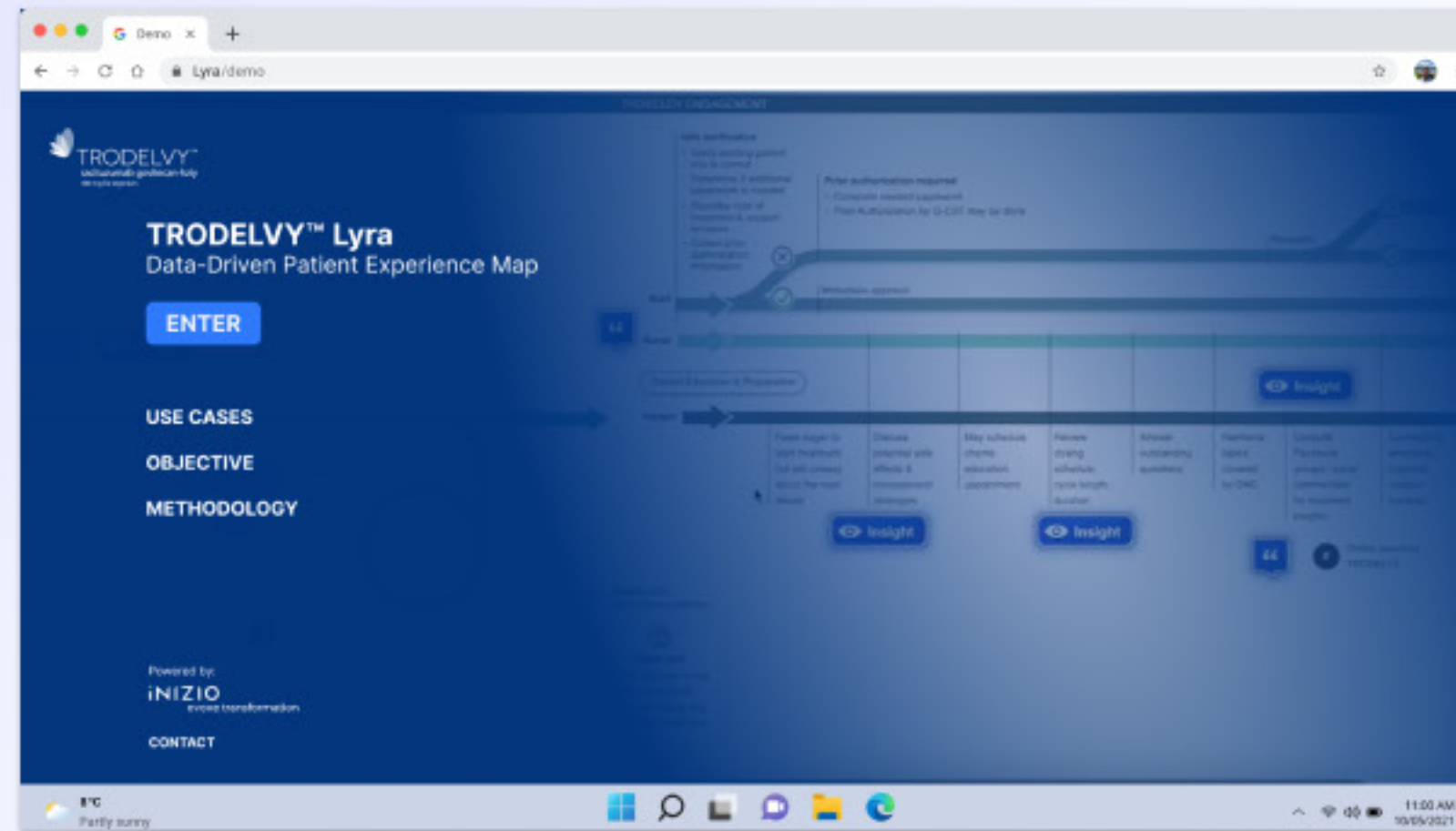
ORIENTATION SCREEN

We established three key orientation sections to provide users with the context and guidance needed to use the application effectively.

Use Cases: Describe scenarios where the application is useful, explaining what information users can access in specific contexts.

Objective: Provide a concise explanation of the application's purpose.

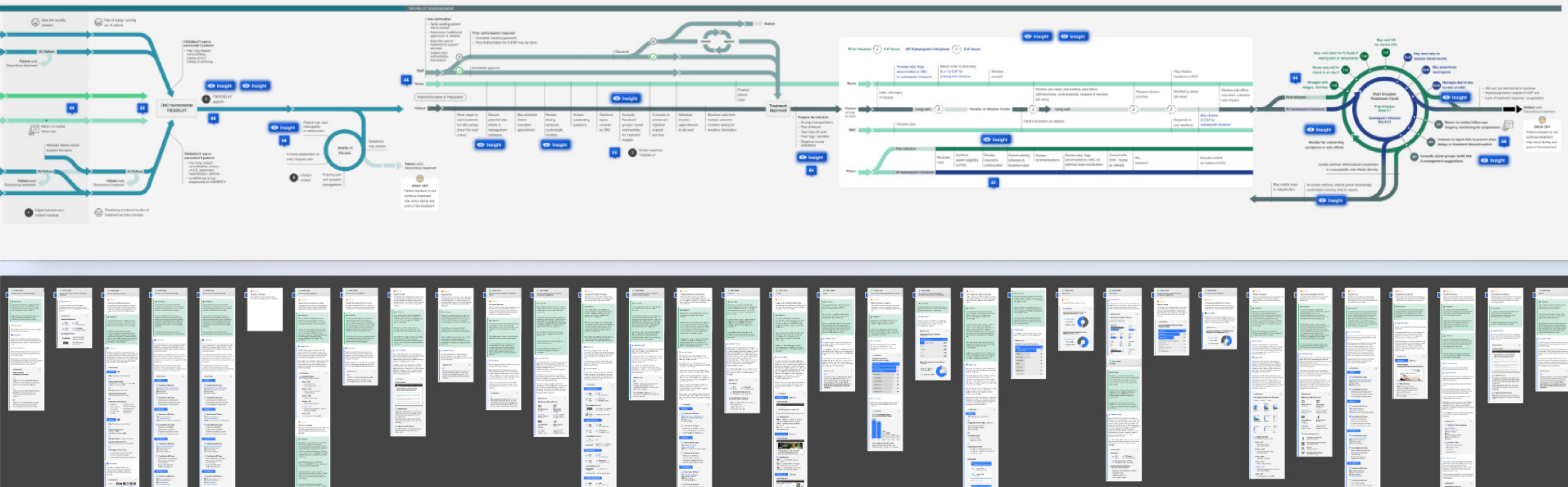
Methodology: Offer a detailed background on how data was collected and processed.



PRODUCTION FINALIZATION

Driving the final design phase, **I led a team of two designers to complete the full map and content cards**, incorporating CX and Data input before submitting to Regulatory for review.

While awaiting Regulatory feedback, I worked hands-on with our developer, **optimizing map changes and setting up a component-to-CSS naming convention** to ensure a smooth build process.



The application was successfully delivered on time, providing immediate value to the client partners and the broader brand team during scheduled brand planning days.

Seamless Integration of Insights

The application highlighted the seamless integration of data-driven insights, behavioral trends, and media touchpoints. Clients praised the depth of analysis and its practical relevance.

Elevated Interest

Following its success, we were invited to present the application and our process to the client's higher Engagement and Activation Lead.

Future Enhancements on Hold

I continued discussions with CX and Data teams to explore incorporating future enhancements outlined during earlier workshops. Unfortunately, my role ended abruptly, and I lost visibility to the work stream.

“This approach connects the dots we’ve been missing for years—it’s incredibly insightful.”

– Client Stakeholder

OBSERVATIONS

Starting from an observation, we developed two dynamic applications by seizing the initiative and fostering cross-functional collaboration. Both applications were impactful, but more importantly, they highlighted shared achievements, crafted under tight deadlines through teamwork and determination.

Success
Delivered Two MVP Applications Created and delivered two impactful MVPs under tight deadlines.
Cross-Team Collaboration Ensured seamless integration through strong collaboration with CX, Data, and Dev teams.
Internal and External Recognition Recognized for delivering solutions empowering client teams with accessible, data-driven insights.

Areas to Improve
Visual Design The UI continually lagged behind the priorities of the map and content. The design language of the cards and map pins needed refinement to meet higher visual standards.
User Feedback Limited real-world feedback left questions unanswered about usability and usefulness. Without broader testing, some blind spots definately went unnoticed.

Thank You!