Our Client sought our expertise in documenting and understanding the inputs, mental models, motivations, and challenges that exist in determining if an individual with chronic kidney disease, who requires dialysis, is a candidate for a non-surgical, endovascular AV fistula procedure as an alternative to surgery. The insights from this research were meant to influence the Client's sales, marketing, and training collateral and processes. Due to the challenges of securing time with physicians and their medical staff, the project required some creative recruiting in order to engage a sufficient number of practitioners that varied by region, specialty, and procedural practices.

We used the Client and Lean Geeks teams' relationships with practices and professionals in the dialysis space to engage a variety of practitioners. We also employed agile practices in evolving the research process and outcomes as challenges arose. As a result, we successfully delivered a service blueprint of the patient journey, practitioner inputs, decisions, and actions and most importantly, the opportunities posed to the Client to increase adoption and use of the device.

Phase 1 – Assessing the Org and Validating the Opportunity

Pre-Discovery Assessment

The Lean Geeks team conducted interviews with Client stakeholders and team members to understand the existing challenges and opportunities in this space. Additionally, we learned about their roles, expertise, and the value of new opportunities that emerge from this research.

Significantly more time and more effort was required throughout the patient journey. These challenges, in many instances, were barriers to adoption and use.

Discovery

Our team planned and executed research activities that included practitioner recruitment and semi-structured interviews. We also interviewed practitioners supplied by the Client team.

Recruitment challenges

It was difficult to get practitioners to commit to devoting time to our interviews, even with monetary compensation. For many of them, it required a clear articulation of "what's in it for me?" We engaged several of our Client's existing customers, as well as practitioners in our participant network. We supplied additional compensation to practitioners who took part in our research and referred a colleague to participate. This allowed us to leverage the trust relationships that exist amongst professional colleagues.

Opportunity identification

Semi-structured interview participants provided the factors that influenced their decision to specify non-surgical versus surgical fistula candidates. Practitioners involved in this decision from referral to dialysis were engaged. These insights were used to determine the following as it relates to practitioner decisions and actions:

- Factors that relate to the culture and process within a physician's practice or dialysis center
- Industry and regulatory factors and their impact if any on decisions
- Client team artifacts and interactions with physicians and dialysis centers that influence the decision-making process

With the Client team's support, Lean Geeks organized, defined and facilitated research that led to the creation of validated and prioritized requirements for improvements and best practices.