

Inbox: “What and Why”

A Guide for Developers Joining the Inbox Project

By Alyson Gagne, Senior Product Manager

Contents:

[Overview, AKA the “So What”](#)

[Product Vision](#)

[User Profiles and Use Cases](#)

[Problem Statements](#)

[Roadmap](#)

[Looking Ahead](#)

Overview, AKA the “So What”

Bidirectional messaging is Artera’s differentiating product, but it is underutilized and doesn’t meet a lot of our customer’s needs. While competitors like [COMPETITOR] provide a basic texting platform, Artera’s product provides true two-way texting between patients and their healthcare providers. If employed effectively, it can increase patient satisfaction, decrease no-shows, and allow staff to work more efficiently. However due to limitations in the product, [x%] of our clients are using bidirectional for only the bare minimum or are not using it at all. This represents a significant retention risk for Artera because customers who are not using bidirectional are using a product with features that are equivalent to many other products on the market and could easily be poached by another company offering these basic features for a lower cost. For this reason we need to make bidirectional messaging and the inbox experience the reason that customers sign up for and remain with Artera - not just a nice-to-have extra.

Product Vision

A bidirectional messaging platform that allows healthcare orgs to communicate seamlessly with their patients, so that staff can provide a better patient experience with higher quality outcomes using less time and effort.

User Profiles and Use Cases

Job functions of our most common users:

- Admin users
 - Schedulers
 - Receptionists
 - Call center staff
- Managers of groups of admin users (i.e., the bosses of the people in the previous line)
- Clinical users (infrequent)
 - Nurses answering clinical questions
 - Triage nurses

Profile	Examples	Use Case
Single-practice staff user	<ul style="list-style-type: none"> • A receptionist in a single practice (e.g., the receptionist at the dermatology office) • The only user at a small single-practice enterprise 	<ul style="list-style-type: none"> • I can see all the messages that are relevant to me, and none that aren't, so that I can focus on what I need to focus on • I can get notifications when a message comes in that I need to pay attention to, so that I can know when something needs my attention when my attention is focused on other tools (like my EMR, which is most of what I'm doing during the day) • I can have a quick and easy way to find the right quick response in any conversation, so that I don't have to waste time digging through potentially very long lists of quick responses • I can have messages flagged or even prioritized based on whether they require an action from me, or are urgent, or include profanity or other abusive language, etc.
Multi-practice staff user	<ul style="list-style-type: none"> • A scheduler who manages schedules across multiple practices • A receptionist who works across multiple practices 	<p>All of the above, plus:</p> <ul style="list-style-type: none"> • I can see all the messages that are relevant to me across all of the practices that I interact with. • I filter by criteria that rarely change (typically they don't change unless my job function changes), so I want filters that I can set and have persist so I don't have to reset the same filters every day • I don't see messages that are in practices I don't have access to, so that I'm not overwhelmed by messages that aren't relevant to me
Multi-practice manager	The managers of multiple staff users (e.g. the call center manager)	<ul style="list-style-type: none"> • I can see all the messages in all the practices that I am a manager over, so that I can monitor and review how my staff are doing and pop in when they need help • I can get reports or have some other way of reviewing the performance of my employees, such as response time and number of messages sent per employee, so that I can tell how my employees are doing and provide feedback or guidance where necessary • I can easily audit the messages that my employees are sending, so that I can identify where staff need more help and provide additional training • I can be notified about messages that need to be escalated due to angry patients or profanity, so I can take over for my employees in difficult situations
Enterprise user	<ul style="list-style-type: none"> • Also potentially a multi practice manager • The "owner" of Artera within the org • Operations • Quality Control • Legal/privacy/compliance 	<p>All of the above from "multi-practice manager" plus:</p> <ul style="list-style-type: none"> • I can set organization-wide quality standards, and have those standards communicated and enforced in-context, so that I know that all of my staff and departments are meeting our standards and delivering a high quality patient experience • I can have built-in training features, so that new users can get trained and proficient on the Artera platform quickly and without taking more time away from other employees than is necessary, so that I can expand bidirectional messaging to more practices faster • I can get reports of message quality, so that I can be sure that staff are sending messages that meet our standards, and develop training or other support when they do not

Problem Statements

Problem	Details
Practice-level inboxes	[REDACTED]
Filters and saved views	[REDACTED]
Message quality control	A [REDACTED]
Operational-izing	[REDACTED]
Preference for automation	[REDACTED]

Roadmap

Release	What's included	What do we want to learn
[REDACTED]	<ul style="list-style-type: none"> [REDACTED] 	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]

Looking Ahead

After we complete the MVP of the new inbox, the next highest priorities for this domain are:

- [REDACTED]

○

