



CURRICULUM

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HEALTH



CONTEXT

PRE-FELLOWSHIP EXPERIENCE

Read: The Healthcare Handbook by Elisabeth Askin and Clayton Christensen and materials about the specific disease (normally two books or multiple articles selected in partnership with the clinical partner).

BOOKLIST

Being Mortal: Medicine and What Matters in the End	Atul Gawande
The Creative Destruction of Medicine	Eric Topol
The Decision Tree: Taking Control of Your Health in the New Era of Personalized Medicine	Thomas Goetz
The Health Care Handbook 2nd Edition	Elisabeth Askin
The Innovators Prescription	Clayton M Christensen
The Patient Will See You Now	Eric Topol
The Woman in the Surgeon's Body	Joan Cassell

RESOURCES

- [Health: When Sex, Race, and Location Matter](#)
- A comprehensive [list of blogs](#) on all different health policy topics. You can realistically only check a few regularly but this is a good list to pick and choose from
- [Health Affairs Blog](#) - a wonky blog that covers all health policy issues and regulatory changes
- [The Healthcare Blog](#) - great blog that touches on all aspects of the healthcare system and is simple and easy to read
- [The Incidental Economist](#) - A freakonomics type platform that is focused on healthcare
- [Health 2.0 Newsbites](#)
- [Modern Healthcare](#) - Daily digest on healthcare business, policy, and breakthrough research
- [POLITICO Morning eHealth](#) - Daily digest for health and tech with a focus on policy and lobbying
- [StartupHealth](#) - Weekly digest on healthcare startups, entrepreneurs, and a great source of relevant RESOURCES
- [Rock Health](#) - An accelerator that does a weekly digest focused mostly on their portfolio companies but have lots of relevant articles etc.



HEALTH CHECKLIST

Develop a holistic understanding of the healthcare delivery system including: stakeholder dynamics, health policy, health finance, and the roles and responsibilities of the 4 Ps (providers, patients, payors, and pharmaceuticals/medical devices)

EXPLORATION

- Understand the Disease
- Identify all Relevant Health Stakeholders
- Become a Health Policy and Regulatory Expert
- Map the Cost Drivers in the Healthcare Ecosystem
- Learn about Reimbursement and Health Insurance Models
- Understand how Drugs and Medical Devices Are Developed
- Learn about Current and Emerging Health Information Technology
- Understand Population Health and Public Health
- Experience Lean Design at your Partner Health System
- Use Human Centered Design and Human Factors in Health

IDEATION

- Familiarize Yourself with Current Health Startups
- Map the Areas of Focus for Health Investment



EXPLORATION

UNDERSTAND THE DISEASE

PURPOSE: To teach the fellows about the following aspects of the disease. The majority of these will be the responsibility of the clinical partner.

1. Pathophysiology of the Disease Process
2. Prevalence and Demographics
3. Cost of the Disease
4. Risk Factors for Developing the Disease
5. The Disease Manifestation in the Location Where You Work (city or state)
6. The Disease Care Delivery System at Your Clinical Partner
7. Care Team Members
8. Disease Management Techniques
9. Common Interventions
10. Quality Metrics and Outcomes

Educational opportunities will take a variety of forms; we recommend an initial day-long crash course facilitated by clinicians in the specific disease. Additionally, you should interview all members of the care team, including patients and caregivers; shadow clinicians in the out-patient, in-patient, and home care setting; and be involved in any educational opportunities provided by the health system.

RESOURCES:

Examples for Type 2 Diabetes

H1_Diabetes Day

H2_Insulin and Non-Insulin Injectables

H3_Washington Demographics

[American Diabetes Association RESOURCES](#)

IDENTIFY ALL RELEVANT HEALTH STAKEHOLDERS

PURPOSE: To understand who are all the different stakeholders are in the healthcare ecosystem. You should walk away with an understanding of the key actors and with a new, and common, vocabulary. It is recommended that you have a deep familiarity with the following stakeholder groups:

- Providers
- Payers
- Patients
- Pharmaceuticals & Device Manufactures
- Research & Advocacy Organizations
- Regulators



For each category the you should know the different categories of people in each group as well as the groups strengths, weaknesses, and perceived opportunity and threats.

In order to have a deep understanding of the healthcare system and all the stakeholders' roles and responsibilities we recommend you spend at least 30 minutes with one individual in each of the following categories.

- Primary Care Physician
- Disease Specialists (all that are related)
- Faculty Specialists (all that are related)
- Physician, nurse, and home health aide that deliver care primarily in the home
- Pharmacists and NP at a retail clinic (strategist at corporate is also recommended)
- Urgent/Prompt Care Centers staff
- Hospitalist
- Nurse and Nurse Practitioner
- Physician Assistant
- Home Health Aid
- Nutritionist
- Social Worker
- Educator
- Pharmacist
- Psychologist
- Psychiatrist
- Homeopathic Provider
- Patients (never too many patients)
- Caregiver
- Advocacy Organization
- Medicare/Medicaid official
- Head of a simulation lab
- Medical Device Engineer
- Pharmaceutical representative
- Department of Public Health leader
- Department of Veterans Affairs provider and administrator
- Military Health provider and administrator
- Private insurance administrator

This list is by no means exhaustive and we believe that the more individuals you talk to during the program the better.

RESOURCES:

H4_ Health Stakeholders.ppt

[Who Are the Stakeholders in Healthcare?](#)

[Who Are Stakeholders and Why Are There Views Important?](#)

[Digital Health and Care Alliance: Stakeholder Map](#)



BECOME A HEALTH POLICY AND REGULATORY EXPERT

PURPOSE: To become well versed in all the relevant health policies and regulations that will dictate the way money flows and the actions of health stakeholders. It is recommended that you have a deep familiarity with the following topic areas:

- Governing Bodies (all federal and non-governmental bodies)
- Timeline of health policies in the United States
- The impact of the ACA, HITECH, SRG updates, and affiliated court decisions
- Insurance regulations
- Licensing regulations

RESOURCES:

[About the Department of Health and Human Services](#)

[List of Federal Health Agencies](#)

[Kaiser Family Foundation \(so many incredible data and briefs\)](#)

[History of Health Reform Timeline](#)

[Summary of the Affordable Care Act](#)

[HITECH Act Rulemaking and Implementation Update](#)

[National Conferences of State Legislation: Health Tracking](#)

[US Senate Active Legislation](#)

[Consumer Healthcare Guide](#)

[Health Insurance 101 \(usa.gov\)](#)

[Health Professionals Licensing - Department of Public Health DC](#) (each state is different)

MAP THE COST DRIVES IN THE HEALTHCARE ECOSYSTEM

PURPOSE: To understand how money moves through the healthcare system. You should understand what each stakeholder's cash outflows and inflows (direct and indirect) are as well as know how they attract customers, if applicable. This is the level of specificity you should be comfortable with:

Patients

- *Money Outflow:* Providers (co-pays), Government (Taxes), Insurance (premiums), Retail (wellness, supplies), Pharmacies (co-pays and off insurance drugs), Caregivers (hourly wages), and Advocacy Groups (donations).
- *Money Inflow (indirect):* Insurance (reimbursements), Government (benefits, health programs, improved health system capacity), Caregivers (family who are giving pro-bono time), Advocacy Groups (research and support), Retail (rewards points) and Non-Profits (services)
- Money Inflow (direct): None
- How They Attract Customers: N/A

RESOURCES:

Book: [Healthcare Finance](#)



Book: [The Health Care Handbook 2nd Edition](#)
[Health Care Cost Calculator - AARP](#)
[Health Costs - Kaiser Family Foundation](#)
[Health Care Cost Institute](#)
[The Cost Conundrum - Cost Disparities \(NY Magazine\)](#)
[Introduction to Health Care System in America \(Khan Academy\)](#)

LEARN ABOUT REIMBURSEMENT AND HEALTH INSURANCE MODELS

PURPOSE: Understand how both fee-for-service and fee-for-value models work. This will evolve even within the year that you are fellows so stay up to date on what innovative hospitals are doing.

RESOURCES:

[Fee-For-Service Overview by Medicaid](#)
[The Death of Fee-For-Service in Healthcare](#)
[If Fee-For-Service is the Problem, What is the Solution?](#)
[Five Payment Models: The Pros, The Cons, the Potential](#)
[Which Healthcare Payment System is the Best?](#)
[Movement from Fee-to-Service to Fee-for-Value](#)
[Fee-for-service vs. value-based care: 6 points of debate raised by health policy experts](#)
[How to Succeed at Fee-for-Service While Preparing for Value-based Payment](#)
[Disruptive Innovation In Health Care Delivery: A Framework For Business-Model Innovation](#)
[Turning Value Based Healthcare into a Real Business Model](#)
[Accountable Care Organizations \(ACOs\): General Information](#)
[Accountable Care Organizations, Explained](#)
[Few Medicare ACOs earned bonuses in 2014](#)
[Healthcare.gov](#)
[Health Insurance Glossary](#)
[Market Share and Enrollment of Largest Three Insurers - Individual Market](#)
[Compare Reviews of Health Insurance Companies - Consumer Affairs](#)
[Top Health Insurance Companies](#)

UNDERSTAND HOW DRUGS AND MEDICAL DEVICES ARE DEVELOPED

PURPOSE: Understand the processes for getting medical devices and drugs developed, approved, and sold.

RESOURCES:

[The Drug Development Process](#)
[Device Approvals, Denials, and Clearances](#)
[Deconstructing the Drug Development Process: The New Face of Innovation](#)
[The Most Commonly Prescribed Drugs in America](#)
[The Medicare Part D Prescription Drug Benefit](#)
[Prescription Drug Costs and Health Reform: FAQs](#)



LEARN ABOUT CURRENT AND EMERGING HEALTH INFORMATION TECHNOLOGY

PURPOSE: Understand large health information technology trends and be able to understand how these trends, and the current products, impact the delivery of care. You should be familiar with each of these things:

- Electronic Health Records (EHRs)
- Personal Health Records (PHRs)
- Electronic Medical Records (EMRs)
- Meaningful Use Requirements
- E-Prescribing
- Online Communities
- Personal Health Tools

RESOURCES:

[Basics of Health IT](#)

[It's 2015, Why Haven't Our Medical Records Entered the Digital Age?](#)

[The 20 Most Popular EMR Software Solutions](#)

[The Top 100 EHR Companies](#)

[Personal Health Record: A Tool for Managing Your Health](#)

[Blue Button Initiative](#)

[How Does E-Prescribing Work?](#)

[Meaningful Use Definitions & Objectives](#)

[Online Community: Patients Like Me](#)

[Apple Health Kit](#)

UNDERSTAND POPULATION HEALTH AND PUBLIC HEALTH

PURPOSE: Understand population health and public health. This includes understanding the people and organizations involved, how interventions are run and evaluated, and the role these two disciplines have in improving macro health outcomes.

RESOURCES:

[What is Population Health?](#)

[What Are We Talking About When We Talk About Population Health?](#)

[Population Health in the Affordable Health Era](#)

[Populations, Population Health, and the Evolution of Population Management: Making Sense of the Terminology in US Health Care Today](#)

[American Public Health Association: Topics and Issues](#)

[WHO: Public Health Definition](#)

[Publichealth.org](#)



EXPERIENCE LEAN DESIGN AT YOUR PARTNER HEALTH SYSTEM

PURPOSE: Work with your clinical partner to see how they have implemented lean design across their care delivery processes. Potential parts of the organization you might want to research is, this list is by no means exhaustive it is just a few common terms:

- Simulation Lab
- Human Factors Lab
- Lean Process Team
- Maker Doctors and Nurses Groups
- Efficiency Teams

USE HUMAN CENTERED DESIGN AND HUMAN FACTORS IN HEALTH

PURPOSE: Research how human centered design and human factors are being used to improve healthcare. You can do this with your clinical partner's staff and by engaging with other health systems and startups that are interested in design and health. Below are a few RESOURCES to get you started but staying up to date on blogs, attending conferences, and asking each contact for two more contacts will keep you more informed in this space.

RESOURCES:

[National Center for Human Factors: MedStar Health](#)

[What is Human Factors and Why is it Important to Patient Safety](#)

[Patient Safety: The Role of Human Factors and Systems Engineering](#)

[Human Factors Engineering](#)

[Human Centered Design at Mayo](#)

[Healthcare Experienced Designed](#)

IDEATION

FAMILIARIZE YOURSELF WITH CURRENT HEALTH STARTUPS

PURPOSE: To be familiar with the major trends in health startups. You should be familiar with the health companies that are raising large amounts of money, being acquired or IPOing. This is a serious undertaking and that one that requires blog watching, signing up for list-serves, and talking to a lot of startups at conferences and pitch competitions. However, this is one of the most valuable things you will do in terms of solution development so you understand the market, what investors are into, and what health systems are buying.

Also, you should be familiar with the most influential and large health accelerators, as of 2015 these are:



[Startup Health](#)
[Rock Health](#)
[Blueprint Health](#)
[HealthXL](#)
[1776](#)
[HealthBox](#)
[DreamIt](#)
[Tech Stars](#)

RESOURCES:

[Liftoff Health](#)
[ApplySci](#)
[Tiger Labs](#)
[Angel List](#)
[Crunchbase](#)
[Greatist](#)
[Tech Crunch](#)
[FastCo](#)
[Inc](#)
[Highway 1](#)

MAP THE AREAS OF FOCUS FOR HEALTH INVESTMENT

PURPOSE: To understand what angel, venture groups, and large companies are investing in. There are a few sites that track health investments on a quarterly basis. The most up to date reporting comes out of [Rock Health](#) and [Startup Health](#).



DESIGN



CONTEXT

PRE-FELLOWSHIP EXPERIENCE

Read: The Field Guide to Human Centered Design by IDEO.org
(<http://www.designkit.org/RESOURCES/1>)

BOOKLIST

100 Things Every Designer Needs to Know About People	Susan Weinschenk
A Project Guide to UX Design	Russ Unger
About Face: The Essentials of Interaction Design	Alan Cooper
Creative Confidence	Tom Kelley and David Kelley
Creativity, Inc.	Ed Catmull and Amy Wallace
Design of Everyday Things	Don Norman
Designing Brand Identity: An Essential Guide for the Whole Branding Team	Alina Wheeler
Don't Make Me Think, Revisited: A Common Sense Approach to Web Usability	Steve Krug
Enchantment: The Art of Changing Hearts, Minds, and Actions	Guy Kawasaki
Hooked	Nir Eyal
Measuring the User Experience: Collecting, Analyzing, and Presenting Usability Metrics	Thomas Tullis
Needfinding: Design Research and Planning	Dev Patnaik
Purple Cow	Seth Godin
Service Design: From Insight to Implementation	Andy Polaine
Simple and Usable Web, Mobile, and Interaction Design	Giles Colborne
The Plenitude: Creativity, Innovation, and Making Stuff	Rich Gold
The User Experience Team of One: A Research and Design Survival Guide	Leah Buley
Thoughts on Design	Paul Rand
Universal Principles of Design, Revised and Updated: 125 Ways to Enhance Usability, Influence Perception, Increase Appeal, Make Better Design Decisions, and Teach through Design	William Lidwell, Kritina Holden, Jill Butler
Usable Usability: Simple Steps for Making Stuff Better	Eric Reiss
Value Proposition Design: How to Create Products and Services Customers Want	Alexander Osterwalder



RESOURCES

- [Service Design Tools](#)
- [52 Weeks of UX](#)
- [DesignKit](#)
- [Design Sprint](#)



DESIGN CHECKLIST

Experience the entire human-centered design process and feel confident enough to lead a design project end-to-end.

EXPLORATION

- Learn DesignKit: The Course for Human-Centered Design
- Learn Design Kit: Prototyping
- Define Challenge
- Develop Team Charter
- Create Research Plan
- Conduct Primary and Secondary Research
- Identify and Research Analogous Challenges
- Create Personas and Tell Stories
- Develop Journey Maps
- Interpret Learnings and Frame Opportunities
- Frame Opportunities
- Narrow Scope and Develop “How Might We” Questions
- Create Design Principles

IDEATION

- Develop “How Might We” Questions
- Brainstorm
- Create Rapid Prototypes
- Host Co-creation Session
- Gather Feedback
- Select Ideas
- Create Ideation Plan
- Iterate
- Create High-Fidelity Prototypes
- Test
- Select Solutions

IMPLEMENTAION

- Create Solution Roadmap
- Create Final Portfolio



EXPLORATION

LEARN DESIGN KIT: THE COURSE FOR HUMAN-CENTERED DESIGN (ACUMEN + IDEO.ORG)

PURPOSE: To introduce the team to concepts in human-centered design and how the tools can be applied for social change.

Resource:

[Design Kit: The Course for Human-Centered Design](#)

*Make sure the users are registered prior to the start of the class

LEARN DESIGN KIT: PROTOTYPING (ACUMEN + IDEO.ORG)

PURPOSE: To build prototyping skills and understand how and when to prototype.

RESOURCES:

[Design Kit: Prototyping](#)

*Make sure the users are registered prior to the start of the class

DEFINE CHALLENGE

PURPOSE: To develop a shared understanding of the design challenge.

RESOURCES:

[Identify the Challenge](#)

[Frame your design challenge](#)

DEVELOP TEAM CHARTER

PURPOSE: To establish internal terms of agreement within the team. It should include:

- Statement of PURPOSE
- Goals
- Time Requirements
- Key Activities
- Available and Needed RESOURCES
- Expected Communications
- Skills and Abilities Needed
- Role of Team Members



- Role of Clinical Partner and Innovation Partner
- Negotiables/Non-negotiables
- Project Management Tools (Producteev, Slack, etc.) and its PURPOSE
- Project Timeline
- Feedback Culture

RESOURCES:

[Team Charter](#)

[Sample Design Team Charter](#)

CREATE RESEARCH PLAN

PURPOSE: To develop a comprehensive plan, including timeline, goals, leaders, and deliverables, on how the team will conduct research.

RESOURCES:

[Create Project Plan](#)

CONDUCT PRIMARY AND SECONDARY RESEARCH

PURPOSE: To learn about the problem, users, and context surround the design challenge. The team will learn proper interview techniques, ethnographic research methods, and immersion tools. Comprehensive research should include:

Interviewing stakeholders:

- Primary Care Physician
- Disease Specialist(s)
- Faculty Specialist(s)
- Physician, nurse, and home health aide that deliver care primarily in the home
- Pharmacists and NP at a retail clinic (strategist at corporate is also recommended)
- Urgent/Prompt Care Centers Staff
- Hospitalist
- Nurse and Nurse Practitioner
- Physician Assistant
- Home Health Aid
- Nutritionist
- Social Worker
- Educator
- Pharmacist
- Psychologist
- Psychiatrist
- Homeopathic Provider
- Patients (never too many)
- Caregiver
- Advocacy Organization
- Medicare/Medicaid official
- Head of a Simulation Lab
- Medical Device Engineer
- Pharmaceutical Representative
- Department of Public Health Leader
- Department of Veterans Affairs Provider and Administrator
- Military Health Provider and Administrator
- Private Insurance Administrator

Immersing Oneself (i.e. disease simulation)

Shadowing Clinicians:

- In-patient Rounds
- Out-patient Hospital Clinic (RN, NP, DR)
- Out-patient Primary Care Office
- Visiting Nurses



- Home Visit by Physician, PA, or NP
- Retail Clinic Appointment
- Pharmacist Fill
- Psychology Appointment
- Educational Opportunities Provided by Health System
- Support Group
- Tele-Health Appointment

Interviewing Extreme Users

Interviewing Health Entrepreneurs

Observing Home Settings

Reading Books

Conducting Internet Research (i.e. blogs, patient forums)

Building Stakeholder Maps of Interactions (i.e., money flow)



RESOURCES:

D1_GroundRulesForInterviewing

D2_DayInTheLifeWorksheet

[Immersion Techniques](#)

[Immersion Methods](#)

IDENTIFY AND RESEARCH ANALOGOUS CHALLENGES

PURPOSE: To gather a new perspective on your design challenge by studying and immersing yourself in other, analogous experiences.

RESOURCES:

[Analogous Inspiration](#)

[Designing for Growth: Spark Innovation Through Analogy](#)

[Mashups](#)

CREATE PERSONAS AND TELL STORIES

PURPOSE: To synthesize patterns and trends by creating a fictional character. The personas should be used to relate ideas back to people and to think through how the persona would interact with the solution. The team should create multiple personas to represent the range of stakeholders, users, and anyone else who will interact with the solution. The team should also use storytelling as a means to share information and humanize the research.

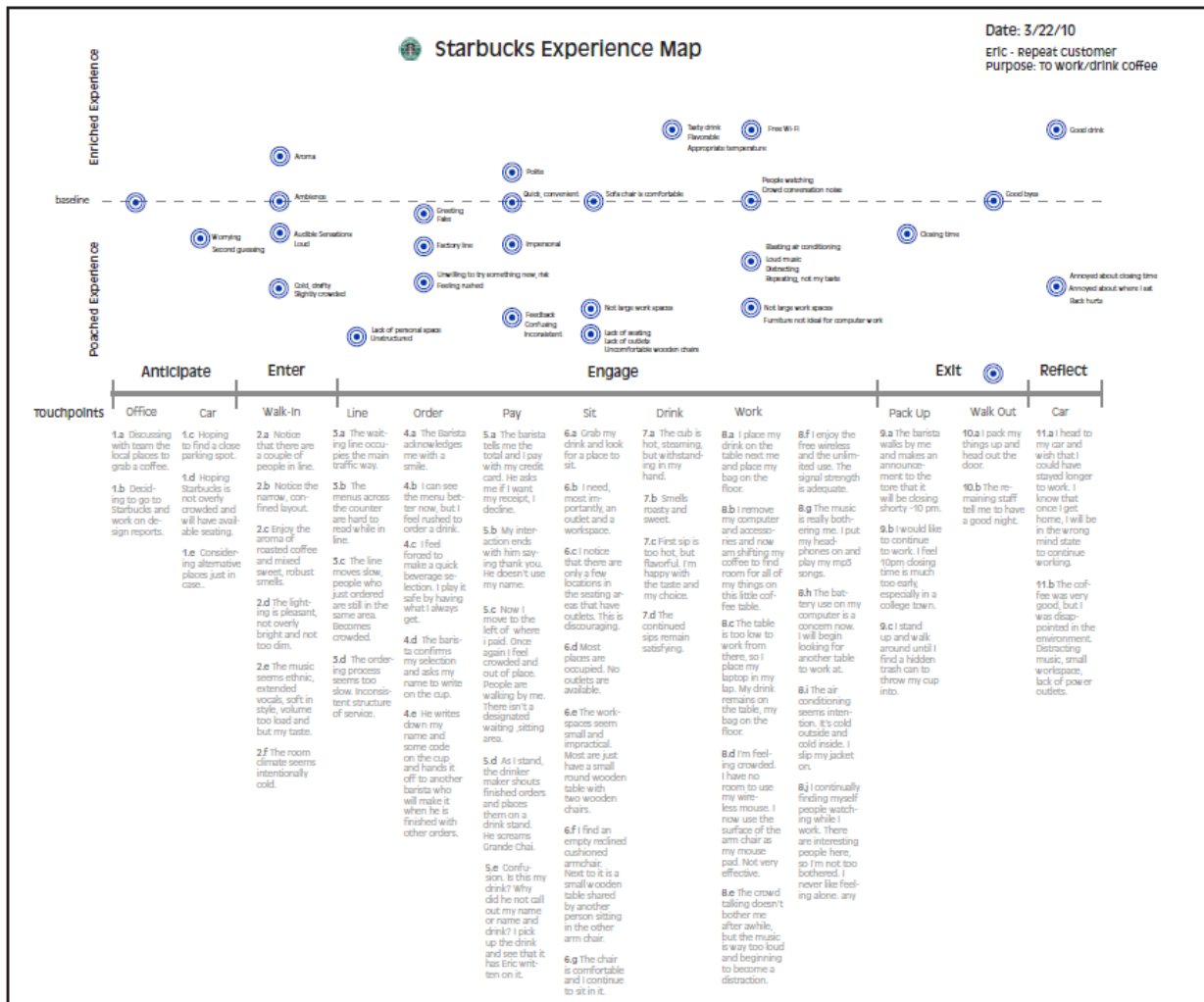
RESOURCES:

[Personas](#)

[WHY GOOD STORYTELLING HELPS YOU DESIGN GREAT PRODUCTS](#)

DEVELOP JOURNEY MAPS

PURPOSE: To gain a deeper understanding of the people you are designing with. A journey map navigates a complete experience, logistically, emotionally, physically, etc. It can be used as a hypothesis to be tested about what you expect will happen or as a summary to synthesize your research.



RESOURCES:

- [Design Thinking 101: Customer Journey Mapping \(video\)](#)
- [Visualizing the Customer Experience: Customer Journey Map and Continuous Improvement Journey Map Template](#)

INTERPRET LEARNINGS AND FRAME OPPORTUNITIES

PURPOSE: To interpret, and synthesize, all of the research in order to frame opportunities to design within.

RESOURCES:

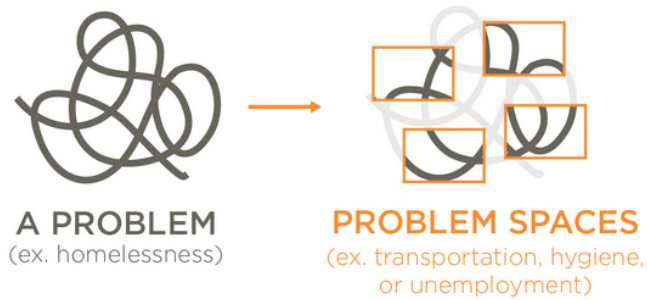
- D3_TheLearningCard
- [Reframe](#)
- [Interpretation Methods](#)
- [Stakeholder Mapping & Analysis](#)



[Clustering](#)

NARROW SCOPE AND DEVELOP “HOW MIGHT WE” QUESTIONS

PURPOSE: To focus the team on a specific challenge and start establishing “How Might We’s”. The team should have 2-3 “How Might We” questions that they will move into the brainstorming phase.

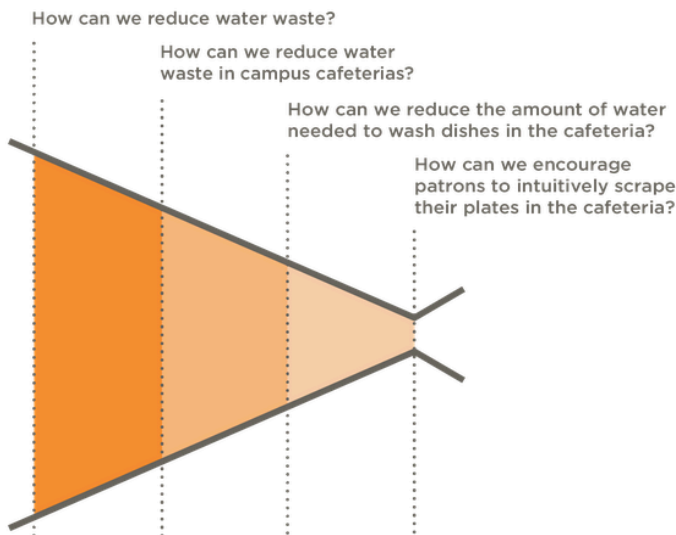


HCW encourage patrons to intuitively scrape their plates in a cafeteria?

USER
who experiences the problem and/or will be the main actor in future solutions.

BEHAVIOR
the desired actions or thoughts that will create change.

PLACE
where a problem occurs and/or future solutions will exist.



HOW CAN WE NARROWING SEQUENCE FOR RIGHT ANGLE



*Images Courtesy of Design for America

RESOURCES:
[How Might We's](#)

CREATE DESIGN PRINCIPLES

PURPOSE: To develop a set of principles that will guide your solution, regardless of the form the solution takes. For example:

DESIGN PRINCIPLES

1. No new habits - for patients or providers
2. Homes are not hospitals
3. Patients are people, with lives beyond diagnosis

RESOURCES:
[Design Principles](#)

IDEATION

BRAINSTORM

PURPOSE: To learn the rules of brainstorming and how to conduct a successful brainstorming session.

Brainstorming Rules

1. **Defer Judgment**
2. **Encourage Wild Ideas**
3. **Build on the Ideas of Others**
4. **Stay Focused on the Topic**
5. **One Conversation at a Time**
6. **Be Visual**
7. **Go for Quantity**



Play games to loosen your mind for brainstorming. For example:

This creativity exercise was developed by Bob McKim and it was more recently popularized by Tim Brown's 2008 [TEDTalk: Tales of creativity and play](#). The materials you need for it are simple: each attendee needs a writing utensil and a piece of paper with 30 circles and 3 minutes of time.

- » Within the given time, the attendees should transform each circle on the paper into something recognizable like a volleyball, bicycle wheels or a planet. Sketches are preferred to trying to compete with Monet. It is okay to draw outside the lines. The goal is to transform as many circles as possible.
- » Afterwards, ask who was able to transform 5, 10, 15, 20 or more circles into a drawing. Usually, people tend to edit and think too long on each circle. Kids are far more spontaneous in drawing. Creative people will not only fill the different circles with drawings but also will include all of the circles, "playing" with them, often even connecting them to create one picture.

Connecting thoughts in an original way is indeed the key to creativity. These warm-ups will get you thinking creatively – without hesitation or any self-doubts – so that you and your team are ready to come up with fresh, ingenious ideas.

*<http://www.pdagroup.net/openpda/2014/08/stretch-your-mind-2-invigorating-warm-ups-for-brainstorming/>

RESOURCES:

[Brainstorming Rules](#)

[Brainstorming](#)

[Generating Ideas](#)

D4_SparkIdeasWithDesignConstraints

CREATE RAPID PROTOTYPES

PURPOSE: To quickly build mockups and low fidelity prototypes in order to understand an idea, discuss it as a team, iterate, etc. Rapid prototyping can include:

- Sketching
- Role Playing
- Storyboarding
- Building Mockups (post-its, pipe cleaners, etc.)

RESOURCES:

[Rapid Prototypes](#)

[Storyboard](#)

[Role Play](#)



HOST CO-CREATION SESSION

PURPOSE: To design alongside the users (i.e. patients, clinicians, etc.) This is a way to brainstorm and iterate quickly with the experts and the people who are dealing with the challenge. This can take the form of a solution brainstorm, journey map, mind map, etc. The team can choose to structure it however they prefer based on their needs. It should be well planned and focused.

RESOURCES:

[Co-Creation Session](#)

[How to Host a Co-Creation Session](#)

GATHER FEEDBACK

PURPOSE: To share your ideas and get people's thoughts on how it would work, how it would be used, the form factor, the ease of use, etc. This can be informal (team gut check) or formal (patient focus group) but should be done consistently throughout the process. It's important not to get too attached to any given ideas or features to ensure flexibility in improving or scrapping the design.

RESOURCES:

[Being a Good Scientist](#)

[Get Feedback](#)

SELECTING IDEAS

PURPOSE: To select three ideas to explore in depth. These are the three solutions that the team will continue to explore and refine, from product development to business model. The three selected ideas will evolve over time with prototypes, feedback, and iteration.

RESOURCES:

[Refining Ideas into Concepts](#)

[Selecting Concepts](#)

[Selecting Top Ideas](#)

CREATE IDEATION PLAN

PURPOSE: To create a plan on how the team will further explore the three ideas. This should include timeline, prototypes to build, testing timing and goals, etc.

ITERATE

PURPOSE: To integrate feedback, brainstorm, and improve the design. The ideation phase is a very iterative, non-linear process. There is a lot of brainstorming, prototyping, getting/giving feedback,



improving the design, brainstorming, etc. This is a natural part of the process and you should always feel comfortable rinsing and repeating at any and every stage.

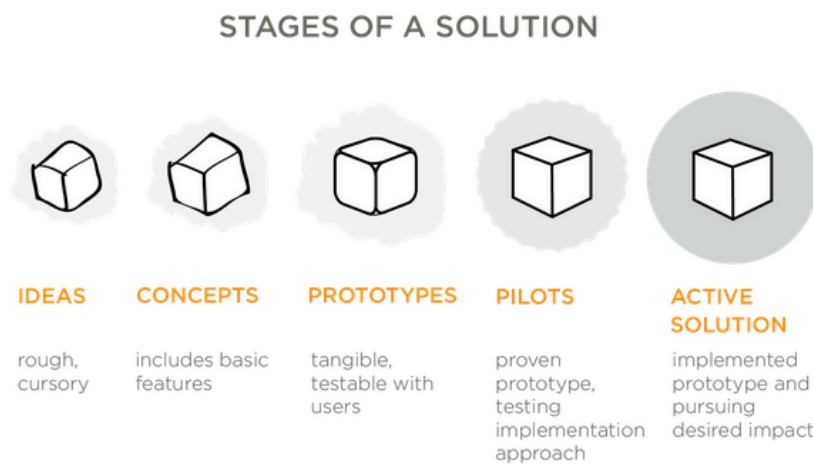
RESOURCES:

[Integrate Feedback and Iterate](#)

[Applying Feedback](#)

CREATE HIGH FIDELITY PROTOTYPES

PURPOSE: To build concepts into tangible products that you can test on users and receive feedback. Prototypes can be looks-like or works-like versions of the final solution.



*Images Courtesy of Design for America

RESOURCES:

D5_10PrototypingPrinciples

[Key Principals of Prototyping](#)

[Prototyping Methods](#)

TEST

PURPOSE: To get feedback on the concept, form, functionality, etc. of the idea. This testing can be formal or informal but should challenge the team's assumptions. This includes:

- User experience (UX) Testing
- Interviewing Users
- Field Testing
- Focus Groups
- Observations
- Proof of Concept

RESOURCES:



D6_10TestingPrinciples

D7_TheTestCard

D8_ProgressBoard

[Performance Testing](#)

[User Testing](#)

[Live Prototyping](#)

SELECT IDEA

PURPOSE: Based on the testing, feedback, need, and feasibility of the three ideas, the team should select one idea to implement into a full solution.

IMPLEMENTATION

CREATE SOLUTION ROADMAP

PURPOSE: To create a plan on how the team will implement the solution. This should include timeline on product development, marketing, fundraising, legal, regulatory strategy, etc.

CREATE FINAL PORTFOLIO

PURPOSE: To have a synthesized way to explain the solution. In addition to creating a portfolio piece, it may be useful to create: a one-pager, a video, a white board animation, etc. that you can send to people, put on a website, submit to a design competition, or use as a tool to explain the solution. It can include:

- Introduction of the Problem (statistics, scale, people impacted)
- Problem's Impact
- Key Insights and Design Goals
- Demo of Concept and How it Works
- Feedback from Users on Concept
- Recommendations and Best Practices
- Inspiring Closing Line

RESOURCES:

[Noun Project](#)

[VideoScribe](#)



ENTREPRENEURSHIP



CONTEXT

PRE-FELLOWSHIP EXPERIENCE

Read: The Lean Startup by Eric Ries (<http://www.stpia.ir/files/The%20Lean%20Startup%20.pdf>)

BOOKLIST

Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers	Alexander Osterwalder
Conscious Capitalism	John Mackey
Delivering Happiness: A Path to Profits, Passion, and PURPOSE	Tony Hsieh
Predictably Irrational	Dan Ariely
The \$100 Startup	Chris Guillebeau
The Entrepreneur's Guide to Business Law	Constance Bagley and Craig Dauchy
The Four Steps to the Epiphany: Successful Strategies for Products that Win	Steve Blank
The Hard Thing About Hard Things	Ben Horowitz
The Lean Startup	Eric Ries
The Startup Owner's Manual	Steve Blank and Bob Dorf
Venture Deals: Be Smarter Than Your Lawyer and Venture Capitalist	Brad Feld
Wired to Care	Dev Patnaik
Zero To One	Peter Thiel

RESOURCES

- Lean Startup Machine - <https://www.leanstartupmachine.com/>
- SXSW - <http://www.sxsw.com/>
- Startup - <https://gimletmedia.com/show/startup/>
- Canva - <https://www.canva.com/>
- Noun Project - <https://thenounproject.com/>
- Startup Owner's Manual - <http://ctinnovations.com/images/RESOURCES/Startup%20Owners%20Manual%20-%20BlankDorf.pdf>



ENTREPRENEURSHIP CHECKLIST

Understand how to start a company including: product development, legal requirements, branding, sales, etc.

EXPLORATION

- Conduct Landscape Analysis

IDEATION

- Create Lean Canvas
- Conduct Competitive Analysis
- Build Landing Page
- Develop a Product
- Outline Workflow Integration
- Develop Regulatory Strategy
- Learn About Quality Control & Verification and Validation Protocols
- Learn About Legal Basics

IMPLEMENTATION

- Inventory Team Skills & Fill Holes
- Develop Business Model
- Learn About Creating a Company
- File Intellectual Property
- Create Brand Identity
- Develop Website
- Understand Start-Up Fundraising and Develop Fundraising Strategy
- Develop Pitch Deck and Pitch
- Develop Social Media Plan
- Develop Partnerships
- Develop Measurable Goals
- Pilot
- Write Relevant Contracts
- Develop Post-Fellowship Plan



EXPLORATION

CONDUCT LANDSCAPE ANALYSIS

PURPOSE: To understand the market, the problem, the current solutions, the customers, the competition, and the flow of money.

RESOURCES:

[How to Conduct Fundamental Market Research](#)

IDEATION

CREATE LEAN CANVAS

PURPOSE: To explore business models and feasibility of different solutions. To start exploring industry trends, supply chain management, competition, etc.

PROBLEM <i>List your top 1-3 problems.</i>	SOLUTION <i>Outline a possible solution for each problem.</i>	UNIQUE VALUE PROPOSITION <i>Single, clear, compelling message that states why you are different and worth paying attention.</i>	UNFAIR ADVANTAGE <i>Something that cannot easily be bought or copied.</i>	CUSTOMER SEGMENTS <i>List your target customers and users.</i>
EXISTING ALTERNATIVES <i>List how these problems are solved today.</i>	KEY METRICS <i>List the key numbers that tell you how your business is doing.</i>	HIGH-LEVEL CONCEPT <i>List your X for Y analogy e.g. YouTube = Flickr for videos.</i>	CHANNELS <i>List your path to customers (inbound or outbound).</i>	EARLY ADOPTERS <i>List the characteristics of your ideal customers.</i>
COST STRUCTURE <i>List your fixed and variable costs.</i>			REVENUE STREAMS <i>List your sources of revenue.</i>	

RESOURCES:

[From Ideo to Business](#) (25 min video)

[Why Lean Canvas vs. Business Model Canvas](#)



E1_Business Model Generation
E2_Lean Canvas Poster
E3_Seven Questions to Assess Your Business Model Design

CREATE VALUE PROPOSITION

PURPOSE: To ensure your solution is creating unique value

RESOURCES:

E4_Where to Start.
E5_Value Proposition Design
E6_Six Ways to Innovate From The Customer Profile
E7_AdLib Value Proposition Template

CONDUCT COMPETITIVE ANALYSIS

PURPOSE: To determine how crowded the market is and where there are opportunities.

RESOURCES:

[How to Write a Competitive Analysis](#)

BUILD LANDING PAGE

PURPOSE: To validate whether people are interested in your offering. Landing pages can also be used for A/B testing to test different business models, pricing options, features options, etc.

RESOURCES:

[How to Make Great Landing Pages](#)
[Lander](#)

OUTLINE WORKFLOW INTEGRATION

PURPOSE: To understand how solution would fit into a hospital, home, clinical, etc. setting.

RESOURCES:

[The 7 Deadly Healthcare Startup Sins](#)

CREATE A REGULATORY STRATEGY

PURPOSE: To understand how the solution complies with FDA regulations

RESOURCES:

[National Medical Device Curriculum](#)



[FDA 101: An Overview of FDA's Regulatory Review and Research Activities](#)

LEARN ABOUT QUALITY CONTROL / VERIFICATION AND VALIDATION TESTING

PURPOSE: To understand how hardware/software solutions are regulated for quality, both during the development and production stages.

RESOURCES:

[Quality System \(QD\) Regulation/Medical Device Good Manufacturing Practices](#)
[General Principles of Software Validation; Final Guidance for Industry and FDA Staff](#)
[Verification and Validation](#)

LEARN ABOUT LEGAL BASICS

PURPOSE: To learn the basics of legal matters (incorporating, cofounders agreements, confidentiality agreements, fundraising, etc.)

RESOURCES:

[Startup Company Lawyer](#)
[Legal Land Mines: What to Know When Starting Your Startup](#)
[What is Intellectual Property?](#)

IMPLEMENTATION

INVENTORY TEAM SKILLS AND FILL HOLES

PURPOSE: To learn about how to efficiently allocate work amongst the team. This will help each team member take ownership so that the team can move quickly. If there are gaps in team skills, identify what type of outside RESOURCES (i.e. university students, interns, contractors, design consulting firms, etc.) the team will need to be successful in executing the project.

DEVELOP BUSINESS MODEL

PURPOSE: To refine the Lean Canvas into a more comprehensive and strategic document. This will ensure that the team has full thought through the idea.

RESOURCES:

[Business Plans: A Step-by-Step Guide](#)



[How to Write a Business Plan](#)

E8_Writing a Business Plan (folder)

LEARN ABOUT CREATING A COMPANY

PURPOSE: To ensure that your team and solution are properly established.

RESOURCES:

[10 Steps to Starting a Business](#)

FILE INTELLECTUAL PROPERTY

PURPOSE: To ensure that your idea is protected through a provisional patent (if you need more time), design patent, utility patent, etc.

RESOURCES:

[Types of Patents](#)

[General Information Concerning Patents](#)

CREATE BRAND IDENTITY

PURPOSE: To establish a brand's core values, tone, aesthetic, etc.

RESOURCES:

[The Marketer's Guide to Developing a Strong Corporate and Brand Identity](#)

[Creating a Brand Identity: 20 Questions You Must Ask Before You Start](#)

[What Makes a Good Logo?](#)

[Why Mood Boards Matter](#)

[Branding Cards](#)

DEVELOP WEBSITE

PURPOSE: To create a more legitimate landing page with more details. Be sure to track Google analytics.

RESOURCES:

[Google Analytics](#)

[SquareSpace](#)

[Wix](#)

[WordPress](#)



UNDERSTAND STARTUP FUNDRAISING AND DEVELOP FUNDRAISING STRATEGY

PURPOSE: To understand how and when to raise money and from whom

RESOURCES:

[How to Raise Money](#)

[What Are The Different Stages of Startup Fundraising?](#)

<https://www.rocketlawyer.com/article/types-of-investors-for-startups.r>

The math of equity at different rounds [explained](#)

[High Resolution Fundraising](#)

[6 Tips to Get Your Startup Off The Ground And Score A Seed Round](#)

[365 Days, \\$10 Million, 3 Rounds, 2 Companies, All with 5 Magic Slides](#)

[How to Analyze Your Startup Like a VC in 15 Minutes or Less](#)

[Notes on raising seed financing](#)

[How Funding Rounds Differ](#)

[The 7 types of angel investors](#)

[Angel Investing Skill 2 - Domain Knowledge](#)

[Angel Investing Skill 3 - Relationships with VC](#)

[Angel Investing - The Most Underrated Skill: Access to Buyers](#)

[Ideal first round funding terms](#)

[The Most Important Question to Ask Before Taking Seed Money](#)

[The Startu-up Guru](#)

[Fundraising Will Take You ~ 3 Months](#)

[Questions VCs Will Ask You](#)

[Everything You Ever Wanted to Know About Convertible Note Seed Financings \(But Were Afraid To Ask\) - Part 1](#)

[Founder Vesting](#)

[Convertible Debt in Plain English](#)

[First Round Fundraising and Founder Vesting](#)

[The Equity Equation](#)

[How to Choose A Board Member](#)

[Raising Seed Capital](#)

[VC Economics - Why Your \\$50 M Exit Means Nothing](#)

[20 questions to ask yourself before raising money](#)

[Is Your Startup A Cash or Equity Business](#)

CREATE PITCH DECK AND PITCH

PURPOSE: To understand how to pitch the solution

RESOURCES:

[How to Write Pitch Decks](#)

[How to Pitch Techcrunch](#)



DEVELOP SOCIAL MEDIA PLAN

PURPOSE: To spread awareness on the solution, gain customers, create content, etc.

RESOURCES:

[How to Build a Social-Media Strategy That Works](#)

[How to Create a Social Media Marketing Plan From Scratch](#)

DEVELOP PARTNERSHIPS

PURPOSE: Identify key partners (i.e. thought leaders, subject matter experts, like-companies, professional industry groups) to increase awareness, identify relevant events/RESOURCES, etc.

RESOURCES:

[How to Create Strategic Partnerships That Are a Win-Win](#)

[Expert Advice: How to Build a Strategic Partnership](#)

DEVELOP MEASURABLE GOALS

PURPOSE: To establish the metrics the define success for the team's solution. The metrics need to be respected by your key stakeholders to convince them of your value.

RESOURCES:

[Writing S.M.A.R.T. Goals](#)

[Practical Considerations in the Measurement of Outcomes in Healthcare](#)

PILOT

PURPOSE: To validate your solution and ensure proof of concept before scaling the solution.

RESOURCES:

[Tips and Recommendations for Successfully Pilot Testing Your Program](#)

[Seven Tips for Healthcare Startups Doing Pilots](#)

WRITE RELEVANT CONTRACTS

PURPOSE: To write legal docs (i.e. cofounder agreements, IP ownership, equity, etc.) to protect the team and the idea.

RESOURCES:

[Docracy - Free Legal Docs](#)



DEVELOP POST FELLOWSHIP PLAN

PURPOSE: To ensure that the project has a clear plan once the fellowship is over. This could involve continuing to work on the solution yourselves, transitioning it to the partner health system, finding other entrepreneurs to pursue the idea, bundling it for a university project, or ending the project.



LEADERSHIP



CONTEXT

PRE-FELLOWSHIP EXPERIENCE

None

BOOKLIST

[7 Habits of Highly Effective People](#)

[Flow](#)

[Good to Great: Why Some Companies Make the Leap...And Other Don't](#)

[How to Win Friends and Influence People](#)

[Strengths Finder 2.0](#)

[The Alchemist](#)

[The Defining Decade](#)

[The Tipping Point](#)

Stephen Covey

Mihaly Csikszentmihalyi

Jim Collins

Dale Carnegie

Tom Rath

Paulo Coelho

Meg Jay

Malcolm Gladwell

RESOURCES

[Absolutely Abby](#)

[Boredom to Boardroom](#)

[Brazen Life](#)

[Corporette](#)

[Glassdoor](#)

[Idealist.org](#)

[Levo](#)

[LinkedIn](#)

[The Daily Muse](#)

[She Negotiates](#)

[StartUp Hire](#)



LEADERSHIP CHECKLIST

The Goal is for each fellow to establish a personal brand, understand their personal strengths and weaknesses, excel in a team environment, and grow professionally

EXPLORATION

- Establish a Positive Team Dynamic
- Build a Network
- Codify Team Goals
- Develop Individual Goals
- Identify Mentors
- Foster a Culture of Improvement
- Track Your Goals
- Inventory Skills
- Provide and Receive Feedback
- Establish an Online Presence

IDEATION

- Develop Project Management Skills
- Support Your Team and Other Professionals
- Revise Goals
- Identify Your Big-Five Factors
- Establish a Clear Skillset
- Tell Your Story

IMPLEMENTATION

- Recruit a Personal Board of Directors
- Be a Mentor



EXPLORATION

ESTABLISH POSITIVE TEAM DYNAMIC

PURPOSE: To create a casual, positive team environment. The team can kick-off the fellowship by playing ice breakers and get-to-know you activities.

RESOURCES:

[Creating an Informal Atmosphere](#)

BUILD A NETWORK

PURPOSE: To learn how to expand, retain, and mature your networks.

RESOURCES:

L1_Communication Workshop

[Five Steps to Building Your Network](#)

[Ten Ways to Build and Maintain Your Professional Network](#)

[How to Network the Right Way: Eight Tips](#)

[Pleasantly Persistent: 5 Rules for Effectively Following Up](#)

CODIFY TEAM GOALS

PURPOSE: To ensure the team discusses what they hope to accomplish over the year and that these goals align with the goals of the clinical partner and organization. These goals should be written in a place that is easily accessible.

DEVELOP INDIVIDUAL GOALS

PURPOSE: To outline your personal goals for the year. These goals will be accomplished while completing required fellowship work, during monthly learning days, and on personal time. You will fill out the goal worksheet and then have a professional development with the program officer to codify your goals.

RESOURCES:

L2_Fellows Individual Goal Worksheet

L3_Writing S.M.A.R.T. Goals



IDENTIFY MENTORS

PURPOSE: To learn how to identify a short list of potential mentors, how to ask someone to be your mentor, and how to interact with your mentor once they have formally or informally started to mentor you.

RESOURCES:

[How to Find the Right Mentor](#)

[Ask the Experts: How do I find a Mentor?](#)

[Richard Branson's Guide to Finding a Mentor](#)

[How to Find a Mentor on LinkedIn](#)

[How Do I Ask Someone to Be My Mentor?](#)

[Be My Mentor? Craft the Perfect Email to Someone You Admire](#)

[7 Deadly Sins Millennials Make When Approaching Mentors](#)

[12 Questions You Should Ask Your Mentor ASAP](#)

[Making the Most of Mentors: A Guide for Mentees](#)

[3 Ways to Make Your Mentorship Relationship Valuable](#)

[Yes, You Need a Mentor, But a Sponsor Will Really Boost Your Career](#)

FOSTER A CULTURE OF IMPROVEMENT

PURPOSE: To build a culture of improvement in the team learn how to be advocates for a culture of improvement in any organization and/or team.

RESOURCES:

[Building a Feedback Rich Culture](#)

[How to Build a Culture that Embraces Feedback](#)

[The Secrets to Building a Constructive Feedback Culture](#)

TRACK YOUR GOALS

PURPOSE: To develop individual techniques for tracking goals and to set up deadlines so you are accountable. The updates best practices are in the attached Update Your Progress question guide.

RESOURCES:

L4_Tracking Goals & Progress

[6 Apps That Help You Stick to Your Goals](#)

[11 Best Tools for Setting and Tracking Goals](#)



INVENTORY SKILLS

PURPOSE: To identify your five core strengths utilizing Gallup's StrengthsQuest test and inventory your current skills and share them with the team so you are all aware of their collective team strengths.

RESOURCES:

L5_SQ/Skill Inventory Worksheet

L6_Personal Brand Exercise

PROVIDE AND RECEIVE FEEDBACK

PURPOSE: To learn how to provide actionable, relevant, and timely feedback to teammates and equip you with transferable skills for other professional experiences. Additionally, to provide you with the tools to maturely receive feedback and utilize it to improve your professional performance and personal interactions.

RESOURCES:

[Five Steps for Giving Productive Feedback](#)

[The Delicate Art of Giving Feedback](#)

[5 Steps to Giving Good Feedback](#)

[How to Receive Feedback and Criticism](#)

[Get Better at Receiving Feedback \(video\)](#)

ESTABLISH AN ONLINE PRESENCE

PURPOSE: To establish a strong online presence that reflects the brand you wish to establish professionally and personally. This includes LinkedIn, Twitter, and an online portfolio.

RESOURCES:

L7_ Online Portfolio Prep

[LinkedIn Tips](#)

IDEATION

DEVELOP PROJECT MANAGEMENT SKILLS

PURPOSE: To develop project management skills (scheduling, scope management, building a case, communication, managing a team, etc.)

RESOURCES:



[Project Management the Basics for Success](#)

[Project Management: Delivering Complex Project Successfully](#)

SUPPORT YOUR TEAM AND OTHER PROFESSIONALS

PURPOSE: To learn how to be responsible and supportive teammates and professionals. A large part of being a teammate and a professional is giving back. Try to continue to give-back to those around you and in your network by doing some (or all) of the following:

- Serve as a mentor
- Review resumes, cover letters, LinkedIns
- Endorse people on LinkedIn and if your relationship is close write a recommendation
- Do mock interviews
- Identify professionals in your network that would be interesting to others and introduce them with intentionality
- Make introductions when people ask, within reason
- Always be thinking about your teammates as well when you are at networking events
- Pass along invites and job opportunities
- Celebrate your networks successes by attending events, asking people to happy hour, and writing congratulatory notes

REVISE GOALS

PURPOSE: To review your goals and codify any changes. Make a clear plan on how to reach your goals by the end of the fellowship.

IDENTIFY YOUR BIG FIVE FACTORS

PURPOSE: To identify your big five factors, the most commonly used model for identifying personalities in academic psychology. This will further increase your own self-awareness and understanding of your personalities and strengths.

Resource:

[Big Five Factors Test](#)

ESTABLISHING A CLEAR SKILLSET

PURPOSE: To have a clear list of your skills. This list can be displayed on a portfolio, resume, or LinkedIn externally. More importantly, this is a exercise which forces you to reflect internally and assess your current strengths and skills to see if there are things they wish to augment during the remainder of the fellowship.



TELL YOUR STORY

PURPOSE: To empower you to tell your professional and personal story. Your story showcases your personal mission and vision statements to future employers, partners, and members of their network.

RESOURCES:

[Marketing 101: The Art of Storytelling](#)

[12 Tips to Perfect the Art of Storytelling](#)

[TED Talks Storytelling: 23 Storytelling Techniques from the Best TED Talks \(free ebook\)](#)

[The Irresistible Power of Storytelling as a Strategic Business Tool](#)

IMPLEMENTATION

RECRUIT A PERSONAL BOARD OF DIRECTORS

PURPOSE: To learn the value of a personal board of directors, outline what skills and people you need on your board, and start to acquire and foster a personal board of directors.

RESOURCES:

[Fiver Rules for Selecting Your Personal Board of Directors](#)

[How to Assemble Your Own Personal Board of Directors](#)

[Sallie Krawcheck Says: You Need a Personal Board of Directors](#)

[Looking Out for Number One](#)

BE A MENTOR

PURPOSE: To learn how to be mentors and sources of knowledge for other professionals, regardless of your age and experience. You can start to be available as a mentor by engaging with the following organizations:

- University alumni associations
- Program alumni associations
- Young Professional and Youth Mentoring Programs
- Your professional network

RESOURCES:

[How to Be a Great Mentor](#)

[7 Qualities of an Effective Mentor](#)