

Development stage

Finding patients and users for testing and development guide

Downloaded on June 12th, 2026

Contents

Seek to understand the needs of all users of the device or service	4
Keep in mind that different questions may be best suited for different audiences.....	5
Consider alternative methods if you can not visit a hospital, health centre or GP practice	6
Do not assume that health professionals know what you know	7
Explore the patient journey.....	8

Patient and Public Involvement (PPI) is the process of involving patients and public to help inform the design and improvement of an innovation or service.

The word public can refer to patients, potential patients, carers and people who use health and social care services, people from organisations that represent people who use services, as well as general members of the public.

PPI is an important part of the innovation pathway. It ensures that innovations focus on what matters to those who will ultimately benefit from a new service or product, that will be both useful and usable. Failing to involve patients and public in the development of your innovation risks your innovation not meeting real world need or being optimised effectively.

Seek to understand the needs of all users of the device or service

When we think of users of a device or service, it is natural to immediately think of who is using it in closest contact with the patient. This is often a doctor or nurse. Whilst it is usually critical to understand how these professionals use the device and what their needs are, it is also extremely important to explore the needs of everyone who comes in contact with the device.

This could include maintenance technicians, clinical support staff, service managers, finance staff, domestic service staff, patients or carers. If the device or service does not incorporate the needs of every person that touches it, it ultimately will not be successful.

It is also important to think about diversity and cultural implications. What may be acceptable to some users is not always for others. Health inequalities are unfair and avoidable differences in health across the population, and between different groups within society. These include how long people are likely to live, the health conditions they may experience and the care that is available to them.

By only talking to current customers, you will miss key voices with unique needs who may give insight as to why someone is not purchasing your innovation today. Recruiting non-customers may be easier than you think. There are many high-quality research panels you can partner with that specialise in recruiting healthcare professionals of all specialties. This costs money, so you will need to set aside a budget if you use a specialist market research firm.

Keep in mind that different questions may be best suited for different audiences

When conducting health innovation market research, it is often assumed that you need to talk to professionals that will use what you are creating.

However, depending on your specific research questions, professionals may not be the right people to approach. For example, if you want to conduct pricing research to understand the purchase and decision-making process for a new medical device, you should not only talk to the clinician using the device.

Pricing feedback is best undertaken with business managers and procurement leads. Failing to gain pricing feedback is one of the first issues seen in this kind of research. Consider the types of questions you want to ask and who is best placed to answer them beforehand, to gain more insightful conversations and data.

Consider alternative methods if you can not visit a hospital, health centre or GP practice

Often, the goal of health innovation market research is to get into a hospital to watch the device or competitive devices in use.

If this is not possible, consider conducting research at a central facility, or over a video call. Many healthcare experts may appreciate a focus group where they can share their feedback with their peers. Many nurses and nurse practitioners work off hours and are readily available to come to a central facility during the day.

If you need to get into a hospital or operating room, consider seeking approval via hospital administrators before reaching out to staff members. This will help to build trust with the right people.

Do not assume that health professionals know what you know

When you are doing research, do not expect healthcare professionals to know brands and available devices inside-out. If you are conducting a qualitative interview, you may find that healthcare professionals know the brand of the device but do not remember the model, or vice versa. To ensure you are speaking about the same device, use images or video of your innovation and relevant competitors.

Explore the patient journey

You could routinely interview, observe, and survey the clinicians that use your products, but do not overlook the patients who will ultimately benefit. Developing a patient journey or pathway map can help navigate product development and customer experience design.

A patient journey or pathway map describes the various stages of care. It begins with the onset of symptoms, through diagnosis and therapy, and ends with either complete recovery or adjustment to a new way of life. At each stage, it shows the tasks patients complete, some clinical and some personal, and their needs. These could be medical, emotional, financial, or relational. Mapping the patient journey can help to make functional innovations that work for both the clinicians using them and the patients needing care.

It is also possible to do this with non-patient journeys if your product or service is not clinical.

This will reveal:

- unnecessary steps, handovers and delays
- waste, such as duplication of effort
- things that do not add value in the patient journey
- bottlenecks and constraints
- unhelpful variation in clinical and non-clinical practice
- potential for creating safer care
- understanding of the patient experience
- where to undertake further analysis, such as understanding demand and capacity and the flow through parts of the journey

The potential approaches to exploring the patient journey include:

- conventional process mapping
- value stream mapping
- spaghetti diagram
- mapping the last 10 patients
- process templates

- tracer study