

# McKesson Pharmacy Reimbursement Dashboard Case Study

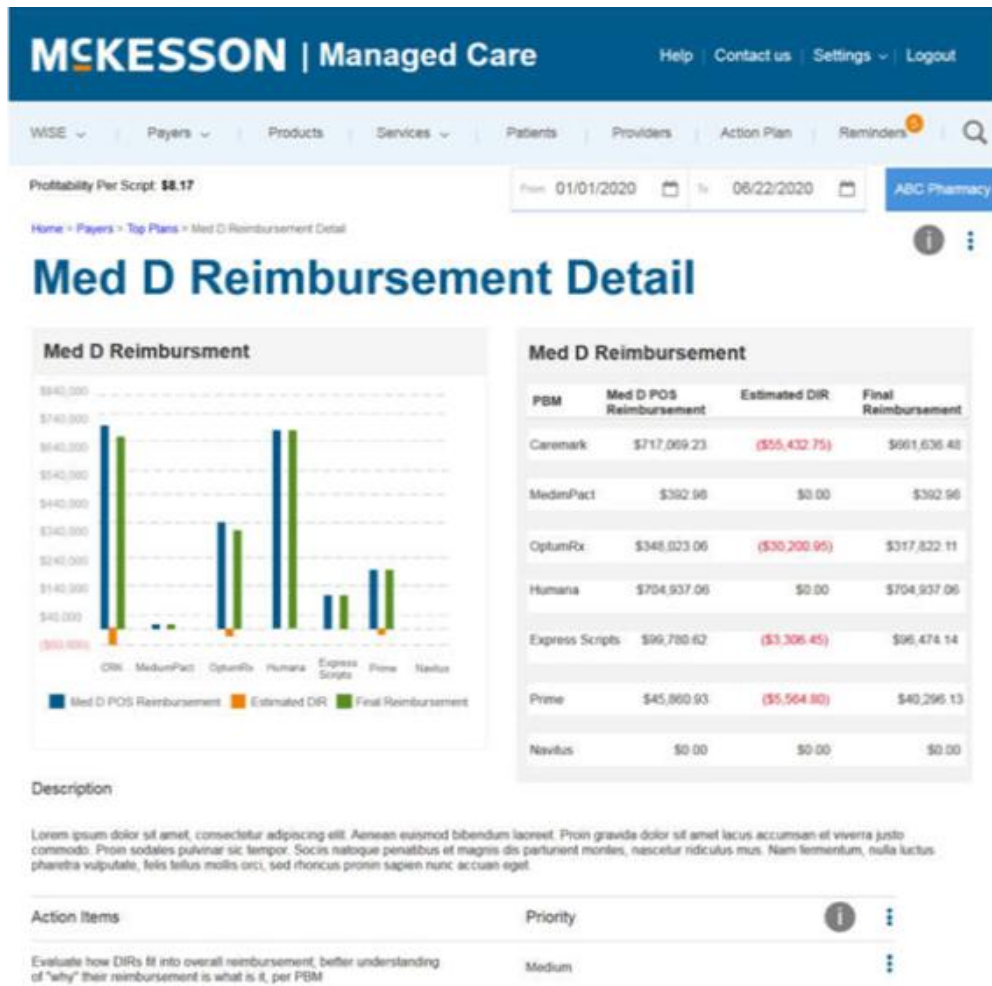
Presented by Theresa Wilkinson

# McKesson Reimbursement Dashboard Case Study



## Agenda

- The Challenge
- Project
- Problem & Context
- Role & Scope
- Research Plan & Participants
- Key Findings
- Recommendations & Prioritization
- Outcome & Impact
- Reflection
- Contact



## McKesson Pharmacy Reimbursement Dashboard — UX Research & Strategy

Led UX research for a data-heavy pharmacy dashboard, helping independent pharmacies monitor payer reimbursements.

- Conducted 4 contextual interviews and 11 usability sessions.
- Identified key usability issues (Task 1 baseline success: 63%) and delivered 12 recommendations; 6 were prioritized for the roadmap.
- Expected outcome: simpler navigation, clearer terminology, and improved task success (~85%).



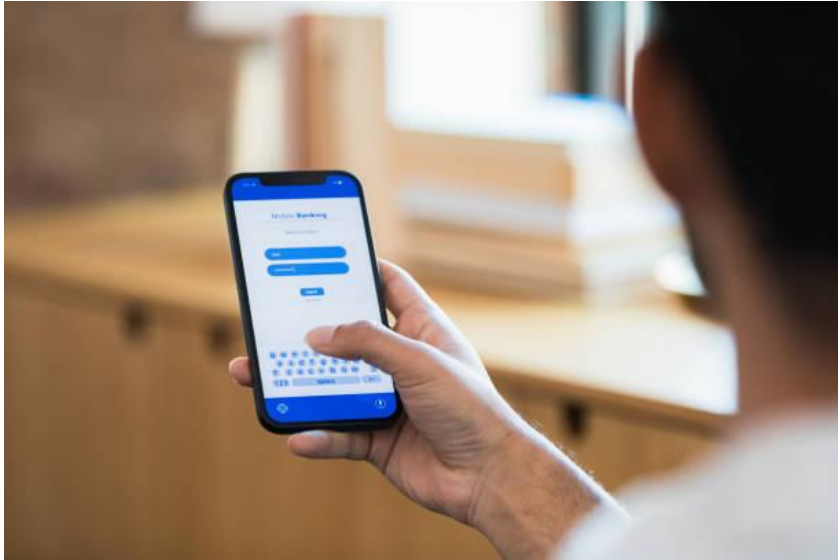
**Goal:** Help independent pharmacies understand and improve prescription reimbursements through a data-driven dashboard.

McKesson aimed to support small, community-based pharmacies serving rural and under-served areas by visualizing reimbursement data to identify financial trends and improve sustainability.



Independent pharmacies struggled to track reimbursement performance due to confusing data from PBMs and rising DIR fees. **Owners needed a transparent, easy-to-understand way to view financial health across stores.**

**Goal:** Make core tasks faster and easier for pharmacy owners while improving confidence in data interpretation.



- Led end-to-end UX research for the McKesson Pharmacy Reimbursement Dashboard
- Conducted generative research, user interviews, and unmoderated usability testing
- Created personas and story mountain to map user journeys
- Built an interactive Axure prototype for concept validation
- Designed the dashboard's interaction flow and data visualization patterns based on research insights
- Collaborated with the product team to refine UI elements, improving clarity and reducing cognitive load in a data-heavy environment
- Facilitated 'How Might We' workshop to align stakeholders
- Synthesized insights and presented findings that guided design decisions

**Tools:** UserZoom, Excel, PowerPoint



**Methods:** Conducted 4 stakeholder and user interviews (1-hour remote sessions with pharmacy owners) to define key themes, followed by 11 unmoderated usability tests via UserZoom.

**Participants:** Independent pharmacy owners and managers from 3 states (avg. 15 years experience).

**Analysis:** Recorded and transcribed all sessions, coded qualitative data for frequency and severity, and quantified usability metrics including task success rate, completion time, and Single Ease Question (SEQ) scores.

Focused on **Waterfall and reporting screens** to guide recommendations.



Waterfall View

- Owners wanted at-a-glance metrics and clear, intuitive dashboards
- Participants struggled with drill-down interactions in the Waterfall View (63 % task success) and misinterpreted category labels such as “Products” vs “Discount Cards.”
- Several expected hover-tooltips or clickable elements that were not interactive.
- Navigation also required too many clicks for key insights.
- 75% of users expected to click bars in charts to drill down for details
- Excessive filters (4 steps) slowed core workflows
- Users requested hover definitions, improved color contrast, and training materials to support adoption

**Outcome & Impact:**

Since its 2021 launch, the dashboard has increased customer satisfaction and strengthened financial transparency for independent pharmacies. Integration with McKesson products simplified navigation, reducing time spent on core financial tasks and allowing staff to focus on higher-value work.

Priority	Recommendation	Expected Impact
High	Enable drill-down on Waterfall bars	+20–30 percentage points task success
High	Add hover tooltips & term glossary	Fewer user errors / better comprehension
Medium	Simplify category labels	Improves clarity and reduces misinterpretation
Low	Expose Top Payer summary on main screen	Fewer clicks to key insights
Low	Improve visual hierarchy & contrast	Better readability and accessibility



Since its 2021 launch, the dashboard has improved customer satisfaction and financial transparency for independent pharmacies.

Seamless integration with McKesson products simplified navigation, reduced time on core tasks, and increased efficiency.

The final design balanced business KPIs with user needs, enabling faster data interpretation and more intuitive navigation for independent pharmacy owners.

**What went well:**

- Strong stakeholder collaboration
- High participant engagement
- Delivered meaningful business impact
- *Integrated research and design to ensure insights translated into actionable interface solutions, improving usability and adoption*

**What I'd do differently:**

- Advocate earlier for tree testing
- Schedule recurring stakeholder check-ins
- Establish a follow-up testing plan to capture post-release metrics.

**Key takeaway:** Communicating UX value in data-heavy, regulated environments is critical to adoption

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