AI Progress Update Builder (Behavioral Health Startup)

Executive Summary

I led the strategy and launch of an AI-powered progress update builder designed to reduce clinician documentation burden and increase repeat platform usage.

The product addressed a high-friction workflow dominated by manual copying and pasting across prior reports and Electronic Health Records (EHR). By introducing structured data reuse and AI-assisted content generation, clinicians reduced time spent on progress updates by up to 75% while improving consistency and trust in their documentation.

Within months of launch, progress updates grew to approximately a significant portion of total report volume and achieved ~50% month-over-month growth, establishing the product as a core driver of platform engagement and expansion.

Context

The Behavioral Health Startup supported clinicians treating pediatric autism by streamlining clinical documentation and report generation using purpose-built AI solutions. While early adoption was driven by initial evaluations, progress updates represented a higher-frequency workflow that remained largely manual and time-intensive.

Clinicians routinely copied and pasted content from prior reports and their EHR, then reformatted information to meet payer and compliance requirements. This created a significant documentation burden, inconsistent quality, and reduced time available for patient care.

From a business perspective, progress updates represented a clear opportunity to increase report volume, improve retention, and embed the platform more deeply into clinicians' day-to-day workflows.

Strategy

I identified progress updates as a priority opportunity based on clinician pain, workflow frequency, and platform expansion potential. To validate the opportunity, I conducted interviews with clinicians to understand how progress updates were created in practice, where time was spent, and which aspects of the workflow could (and could not) be automated.

Based on this research, I defined a product roadmap focused on:

- Eliminating repetitive copying and pasting from prior reports and EHRs
- Preserving clinician control and clinical judgment
- Leveraging existing platform data and services to accelerate report creation
- Introducing configurable workflows to support variation across clinics and payers

I translated these insights into early mockups and workflow concepts, iterating with clinicians to ensure the solution reflected real-world documentation practices rather than idealized processes.

Execution

I partnered closely with design, engineering, and an external EHR integration partner to deliver the progress update workflow. This included:

- Defining API-level data requirements with the integration partner
- Designing how longitudinal progress data would be structured and surfaced in reports
- Determining which content could be reused from prior reports, AI-assisted, or fully clinician-authored
- Introducing new graphing and visualization modules to represent progress over time
- Defining what data would be written back to the EHR to maintain clinical system integrity

Throughout development, I facilitated continuous feedback loops with clinicians to validate our work. I also worked cross-functionally to align product decisions with clinical, operational, and compliance requirements.

In parallel, I supported go-to-market efforts by creating product messaging, developing launch materials, and leading webinars to educate customers and drive adoption.

Outcomes

The progress update builder delivered measurable improvements in both clinician experience and platform usage:

- Up to 75% reduction in report writing time
- Progress updates experienced ~50% month-over-month
- Progress updates grew to a significant portion of total company report volume

Beyond initial adoption, the workflow established a scalable technical and product foundation for future report types, quality assurance tooling, and deeper longitudinal reporting across patient records.

Details have been generalized to preserve confidentiality and do not disclose proprietary or customer-specific information.