



INNOVATION IN FOCUS

A Monthly Webcast Series

THIS QUARTER'S FOCUS AREAS:



Welcome – We Will Begin Shortly!

FROM ORGANIZATIONAL GOALS TO CUSTOMER OUTCOMES: AN AI PRODUCT PLAYBOOK

September 10, 2026
11 AM – 12 PM CT

IN PARTNERSHIP WITH



REGINA
BATISTA



VINAYAK
JOGLEKAR

UPCOMING EVENTS

September – November

**Body of Knowledge
Professional Development
Training**

See website for details

September 16

Which PM Style Are You?

12:00 pm – 1:00 pm
(Pacific Time), virtual

September 22

**Conversations That Shape
Great Products**

12:00 pm – 1:00 pm
(Eastern Time), virtual

October 22

AI Evolution of PM

11:00 am – 12:00 pm
(Central Time), virtual

November 3 & 5

**Masterclass: Certificate in
Market Research**

10:30 am – 12:30 pm
(Central Time), virtual

Connecting Innovators Worldwide



**Empowering Professionals to Lead and Advance
Product Development, Product Management, and Innovation**

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FROM ORGANIZATIONAL GOALS TO CUSTOMER OUTCOMES: AN AI PRODUCT PLAYBOOK



REGINA
BATISTA



VINAYAK
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PDMA WEBINAR

From Organizational Goals to Customer Outcomes

An AI Product Playbook

POLL 1

Which best describes your role?

1 Product Management / Product Development

2 Innovation / Strategy

3 Technology / Data / AI

4 Healthcare / Insurance

5 Consulting

6 Other

What are the top 3 blockers your team most often faces when building a product?

- 1 Unclear or shifting priorities** — the “what matters most” keeps changing
- 2 Fuzzy requirements** — we start building before we understand the problem
- 3 Slow decisions and approvals** — waiting on sign-off stalls the work
- 4 Handoffs and silos** — information gets lost between teams
- 5 Not enough people, time, or budget** — too much work, too few hands
- 6 No real customer feedback** — we guess instead of validating

THE MISTAKE

Starting With AI

DON'T START HERE

“Where can we use AI?”

START HERE

“What customer outcome are we trying to improve?”

The Playbook



For each decision, ask: what evidence is required? **Only then decide whether AI can interpret the evidence and whether automation can execute the resulting decision.**

Have you or someone close to you experienced a significant health-insurance delay?

A Prior authorization delayed treatment

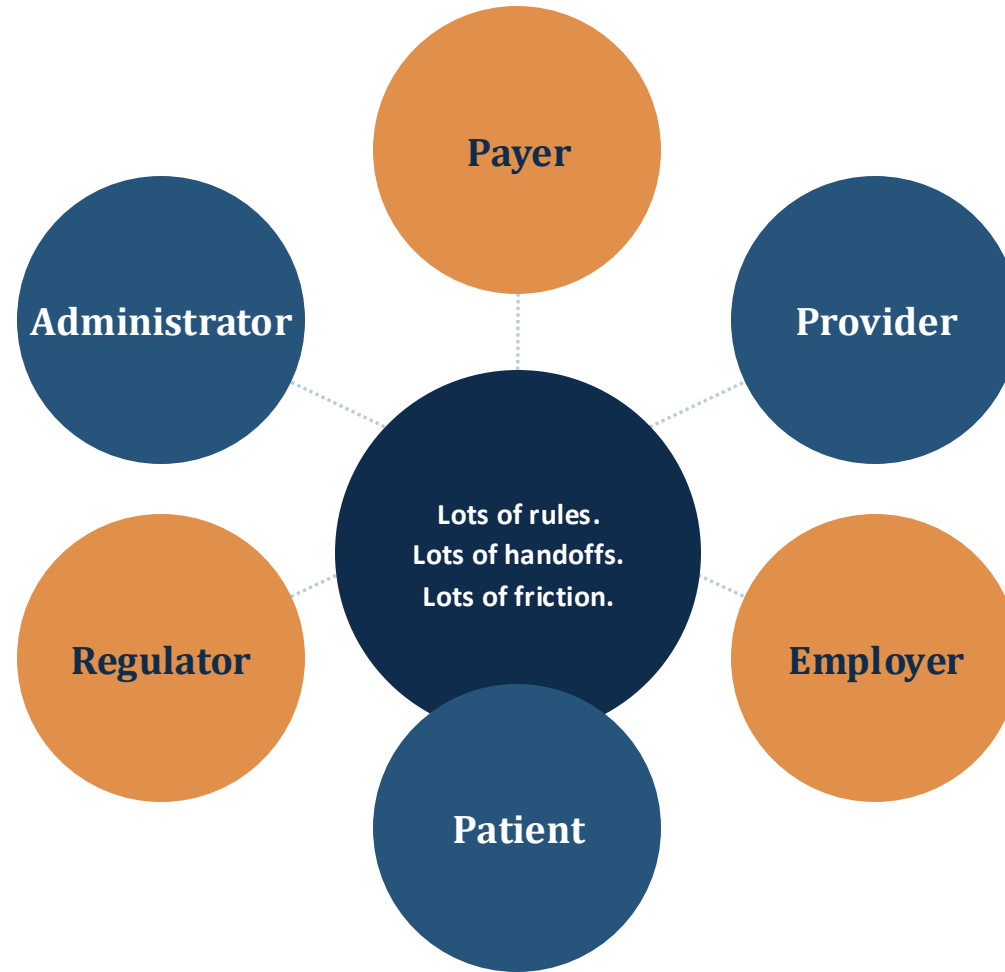
B Claim or reimbursement delayed/denied

C Another major administrative issue

D No significant issue

E Not sure

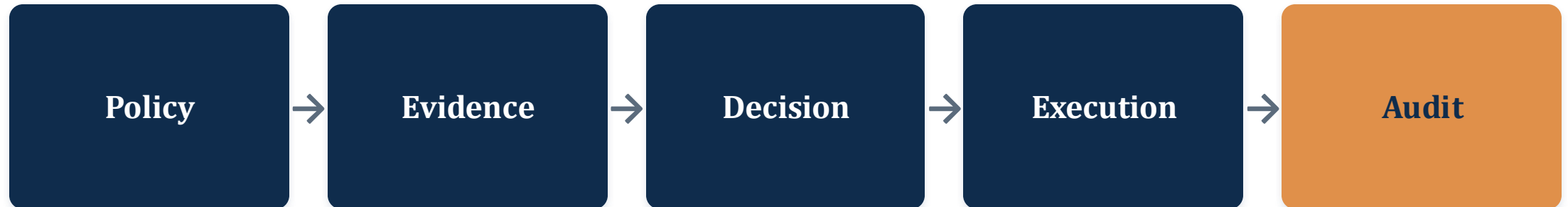
A Complex Healthcare Ecosystem



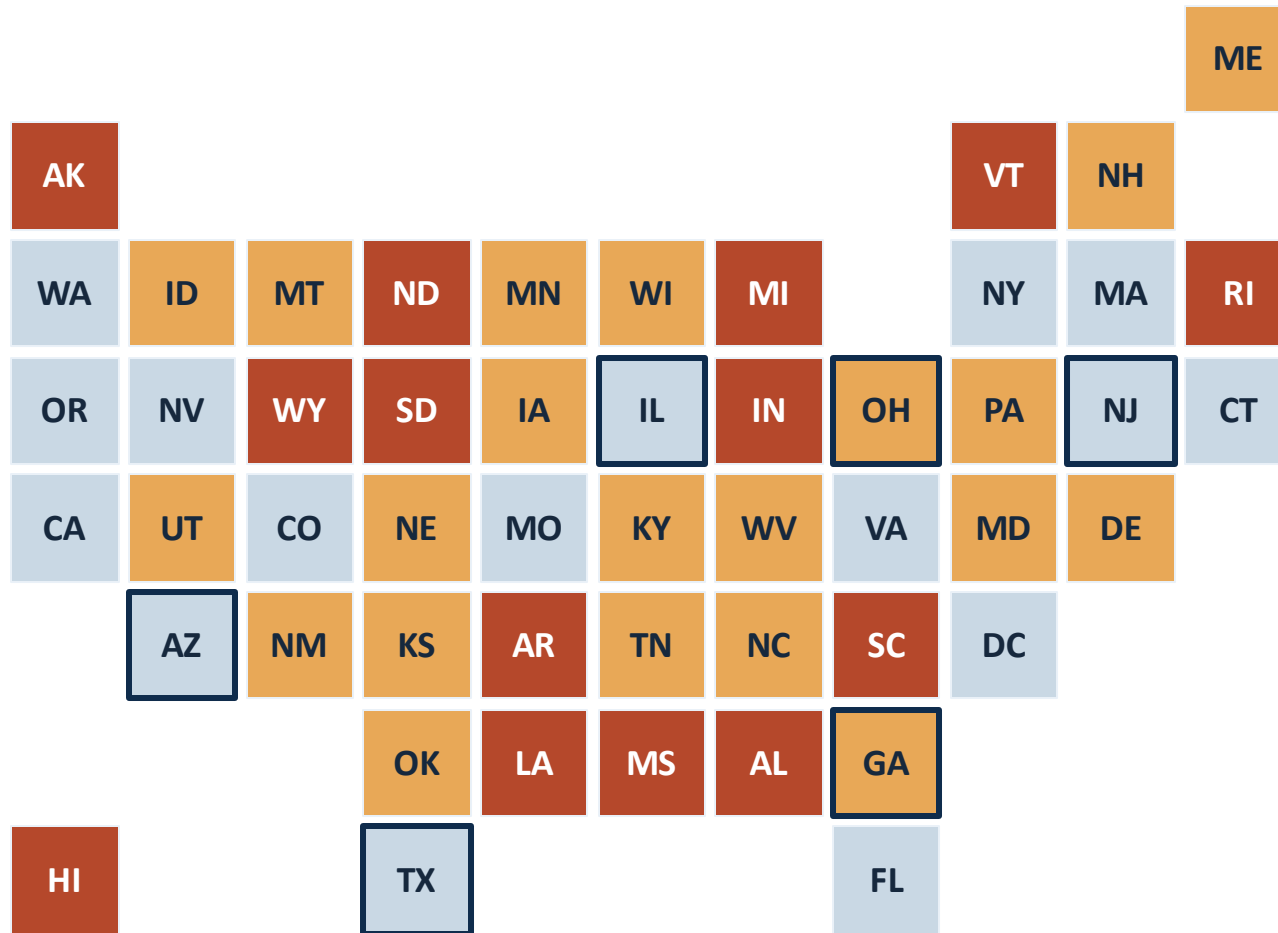
\$800 MILLION

consumed by lawyers and settlement administrators

What if settlement rules became product rules?



Same employer. Very different markets.



WHAT THE COLORS MEAN

- One insurer dominant — near-monopoly
- Two insurers dominant — duopoly
- Three or more competing insurers
- Navy outline — this employer's states

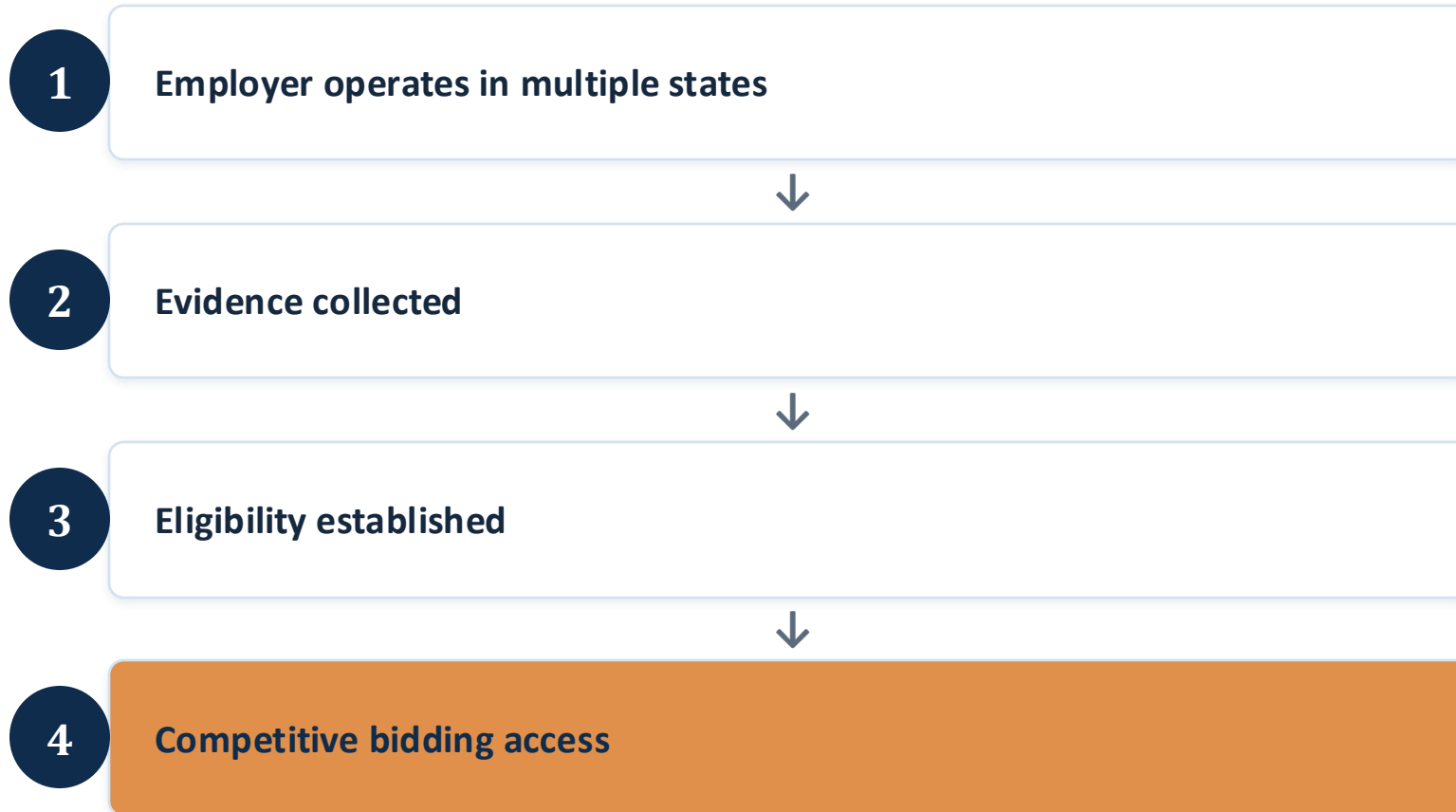
THE QUESTION

Six states, four of them concentrated. Competitive bids only open up once multi-state eligibility is proven.

Illustrative example — not actual market data.

National Accounts

Does this employer qualify as a national account?



*“Is this a judgment problem...
or an evidence problem?”*

AI Agent as Evidence Investigator

1

Receives application

2

Reads submitted documents

3

Checks approved external evidence

4

Identifies contradictions

5

Applies eligibility criteria

6

Produces confidence + evidence trail

80 / 20

80%

Routine, evidence-rich cases

AI-assisted certification

20%

Ambiguous / exceptional cases

Human review

AI Is Only Half the Product

AI ANSWERS

“What do the facts tell us?”

RULES / WORKFLOW ANSWER

“What happens next?”

From Monitoring to Execution

Traditional	Productized
Oversight	Execution
Discretion	Defined rules
Escalation	Resolution
Paper trail	Real-time evidence
Reactive	Preventive

What Does the Customer Actually Experience?

ORGANIZATION MEASURES

- Cost per decision
- Automation rate
- Exception rate
- Compliance cost
- Disputes

CUSTOMER EXPERIENCES

- Time
- Choice
- Clarity
- Fewer handoffs
- Fewer documents
- Faster resolution

Where is your organization today in the AI Adoption journey?

1 Exploring

2 Experimenting / pilots

3 Production deployment

4 Scaling across workflows

5 **AI agents making or executing business decisions**

The AI Product Playbook: Six Questions

1

What organizational outcome?

2

What customer outcome?

3

What workflow creates it?

4

What decisions are evidence-based?

5

Where is human judgment essential?

6

What can execute automatically?

Where are customers waiting for...

- A committee?
- An approval?
- A manual verification?
- An interpretation?

Could evidence + AI resolve most cases?

CLOSING THOUGHT

**Don't automate
the old process.**

Redesign the outcome.

From organizational goals — to customer outcomes.

Q & A

**What process in your organization
would you redesign first?**