



Quali^{AI} User Guide

Step-by-step instructions on how to set up a project and use Quali^{AI} for qualitative market research projects

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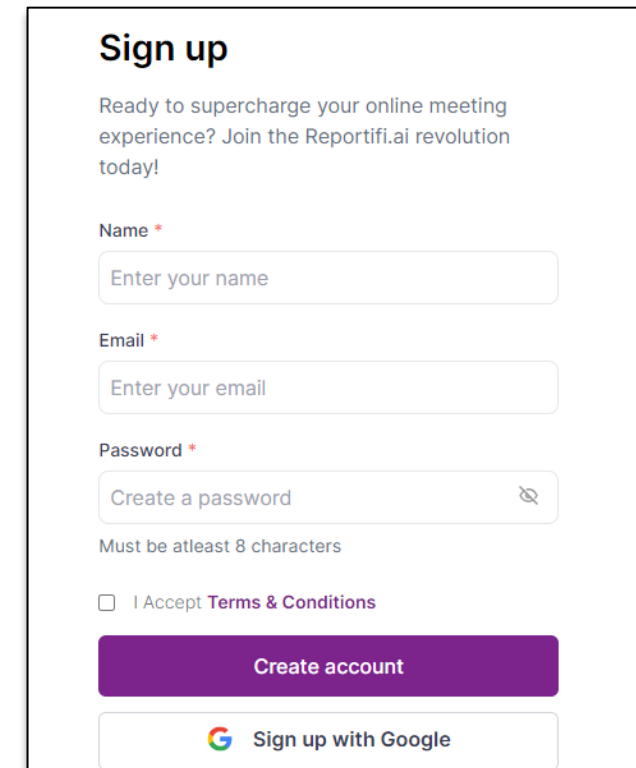
Step 1: Create an Account on Reportifi.ai

1. Sign Up for an Account on [Reportifi.ai](https://reportifi.ai)

- ✓ Click on the “Sign Up” button located at the top right corner of the homepage.
- ✓ Fill in the required information: full name, email address, and create a password.
- ✓ Agree to the terms and conditions and privacy policy by checking the appropriate box.
- ✓ Click on the “Create Account” button.

2. Verify Your Email

- ✓ Check your email inbox for a one-time verification email from Reportifi.ai.
- ✓ Open the email and click on the verification link to confirm your account.
- ✓ Once verified, log in to your account using your email and password



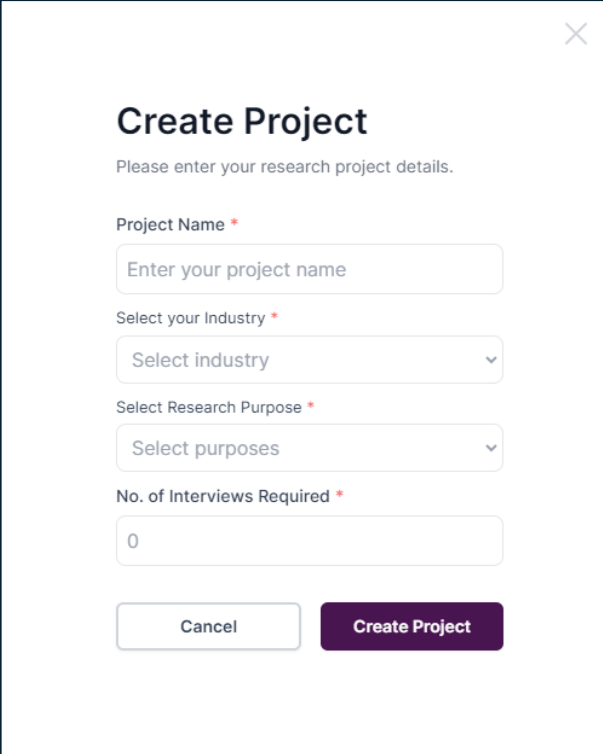
The screenshot shows a sign-up form titled "Sign up". The form includes a heading "Sign up" and a sub-heading "Ready to supercharge your online meeting experience? Join the Reportifi.ai revolution today!". Below this, there are three input fields: "Name *", "Email *", and "Password *". The "Name" field has a placeholder "Enter your name". The "Email" field has a placeholder "Enter your email". The "Password" field has a placeholder "Create a password" and a small icon of a crossed-out eye. Below the password field, there is a note "Must be atleast 8 characters". Underneath the password field, there is a checkbox labeled "I Accept Terms & Conditions". At the bottom of the form, there is a purple button labeled "Create account" and a white button with a Google logo labeled "Sign up with Google".

Step 2: Set Up Your Project for Quali^{AI}

1. Log In to Your Account

2. Create a New Project

- ✓ Click on the “New Project” button in the top right corner of your dashboard page
- ✓ Enter the Project Name
- ✓ Select your Industry
- ✓ Select the Research Purpose (Academic or Commercial)
- ✓ Enter the number of interviews required for this project (you can add more later if needed)
- ✓ Click on the “Create Project” button



The screenshot shows a 'Create Project' modal window. At the top right is a close button (X). Below the title 'Create Project' is the instruction 'Please enter your research project details.' The form contains four fields: 'Project Name' (text input), 'Select your Industry' (dropdown menu), 'Select Research Purpose' (dropdown menu), and 'No. of Interviews Required' (text input with the value '0'). At the bottom are two buttons: 'Cancel' and 'Create Project'.

Step 2: Set Up Your Project for Quali^{AI} (cont.)

1. Upload your Interview Guide in the required format (see the next page for format requirements & upload options)
2. Upload a PDF file of your research stimuli, if applicable
3. Enter your Research Objectives
 - ✓ Type in each objective individually and press the “+” symbol to add the objective
 - ✓ You can see the list of all the added objectives in the “Previous Objectives” dropdown under the entry field
4. Enter your Key Business Questions or Other Questions that you would like summarized from the overall research
 - ✓ Type in each question individually and press the “+” symbol to add the question
 - ✓ You can see the list of all the added questions in the “Business Questions” dropdown under the entry field

The screenshot shows the 'XYZ Patient Journey' project setup page. At the top, it displays the project name 'XYZ Patient Journey' under the category 'Healthcare & Pharmaceuticals', the 'No. Of Interviews' as 7, and the 'Project Unicode' as VGC60292. Below this, there are three main sections: 'Interview Guide', 'Objectives', and 'Research stimuli'. The 'Interview Guide' section has a 'Sample file' icon and two radio buttons: 'Format questions with AI' (unselected) and 'Standard Upload' (selected). Below these are two upload boxes, one for 'DOCX' and one for 'PDF', each with a 'Click to upload or drag and drop' prompt. The 'Objectives' section includes a text input field 'Enter objectives' with a '+' icon and a '0/500' character count, and a 'Previous Objectives' dropdown menu. The 'Research stimuli' section has a similar upload box for 'PDF'. The 'Key Business or Other Questions' section features a text input field 'Enter your question' with a '+' icon and a '0/500' character count, and a 'Business questions' dropdown menu. At the bottom, there is a '+ Add new User' button, a 'Cancel' button, and a purple 'Continue' button.

* Any of the project set-up components can be added or changed later in the project.
Summaries won't be generated following interviews until the interview guide and objectives are included.

Step 2: Set Up Your Project for Quali^{AI} (cont.)

2 Options for Uploading Interview (Discussion) Guide*

1. Format the guide in the required format before uploading (select standard upload)

1. Tell me a little about yourself.
 - 1.1. Are you married or single?
 - 1.2. Who currently lives at home with you?
 - 1.2.1. Children? Grandchildren? Others?
 - 1.3. How do you spend your free time? What are your hobbies?
 - 1.4. Describe the area where you live (rural, suburban, urban)?
2. Are you currently employed?
 - 2.1. Full-time, part-time?
 - 2.2. How long have you been in your current job?
 - 2.3. What do you like most/least about what you do?
 - 2.4. If today, you could pick any job you wanted, which job would you pick? Why do you prefer this job? What keeps you from doing this job today?
3. Thinking about your family and friends, those that are closest to you, how would they describe your personality?

Interview Guide Format Requirements

- ✓ The interview (discussion) guide needs to be formatted with interview questions only (Remove all moderator notes, introduction/ closing paragraphs, or other notes).
- ✓ Main questions need to be numbered 1., 2., 3., etc.
- ✓ Sub-questions need to be numbered with a decimal following the main question number (e.g., 1.1, 1.2, 1.3, 2.1, 2.2, etc.)

OR

2. Upload your existing discussion guide and select the “Format questions with AI” to pull the questions out in the required format

- It may take a few minutes to process the questions. Click Refresh on the Status to check.
- If your topic sections are numbered, remove section numbering from your guide before uploading (incl. Roman numeral numbering)
- Before saving, confirm that all of your questions are extracted appropriately. You can add, delete, or move questions, as necessary
- NOTE: Once you save, you won't be able to see the questions until you generate the question summaries following an interview

Auto formatted questions Refresh

1. Tell me a little about yourself. 🗑️
 - Are you married or single? 🗑️
 - Who currently lives at home with you? 🗑️
 - Children? Grandchildren? Others? 🗑️
 - How do you spend your free time...What are your hobbies? What kinds of things do you enjoy doing during your free time? 🗑️
 - Describe the area where you live (rural, suburban, urban)? 🗑️
2. Are you currently employed? 🗑️
 - Full-time, part-time? ➤
 - How long have you been in your current job? ➤
 - What do you like most/least about what you do? ➤
 - If today, you could pick any job you wanted, which job would you pick? Why do you prefer this job? What keeps you from doing this job today? ➤
3. Thinking about your family and friends, those that are closest to you, how would they describe your personality? 🗑️ ➤

Enter question here... Add

Enter question here... Add

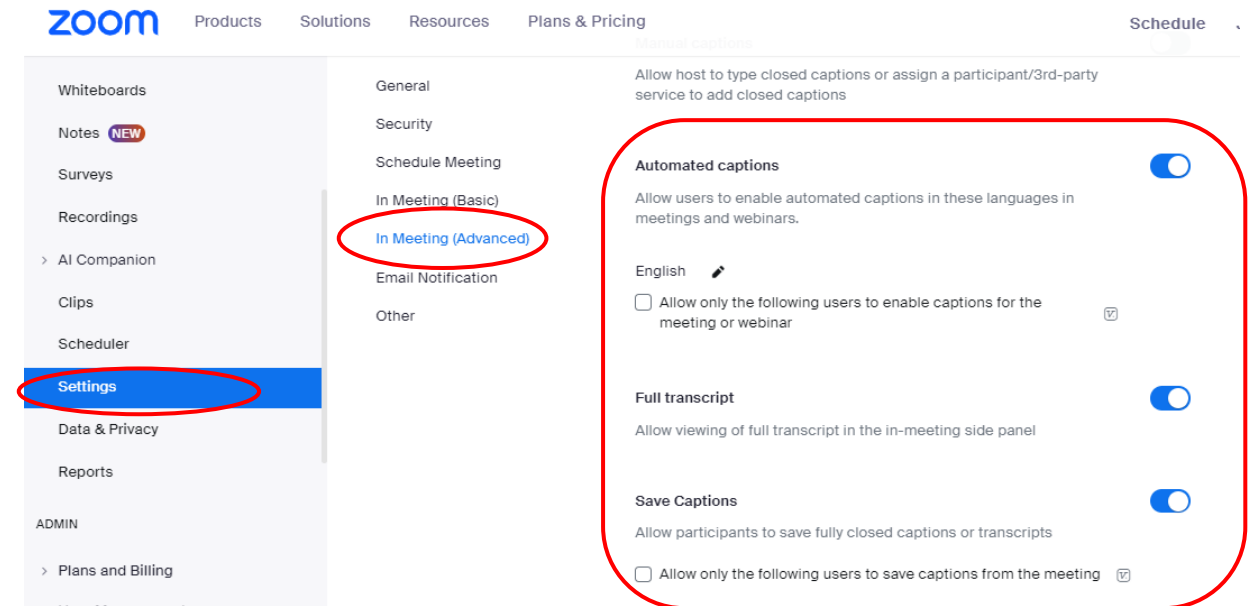
Cancel Save

*Note: Revised interview guides can be re-uploaded later in the project, if needed

Step 3: Set up Zoom for Transcriptions*

Set up your Zoom account to enable captions and transcription

1. Log into Zoom
2. Go to the Settings – In Meeting (Advanced) tab
 1. Select Automated captions
 - Set the Automated Captions to English
 2. Activate the Full transcript
 3. Activate Save Captions

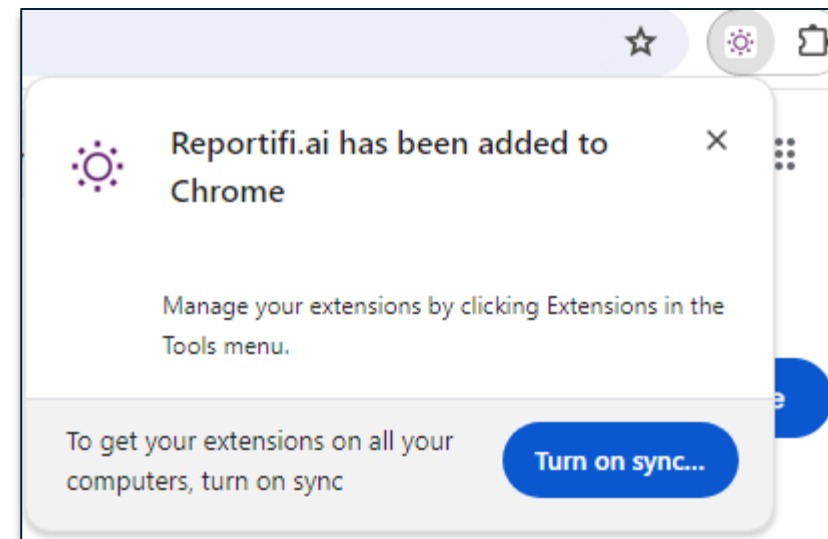
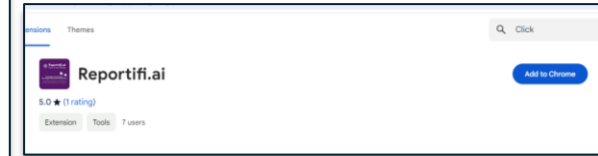
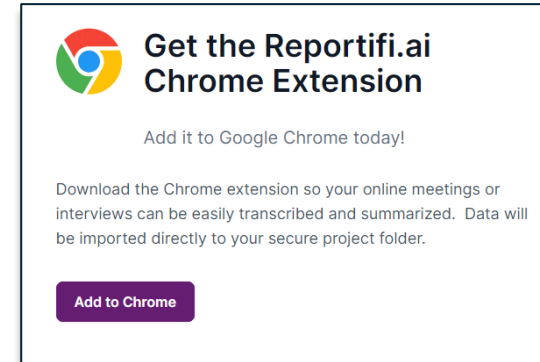
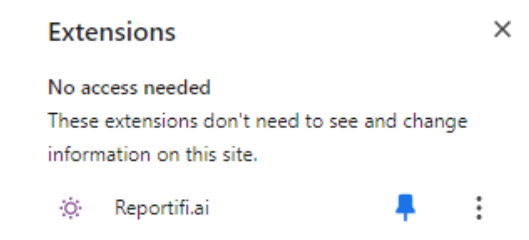


* If using Google Meet, click on Closed Captions in the meeting to enable transcription

Step 4: Download the Reportifi.ai Chrome Extension

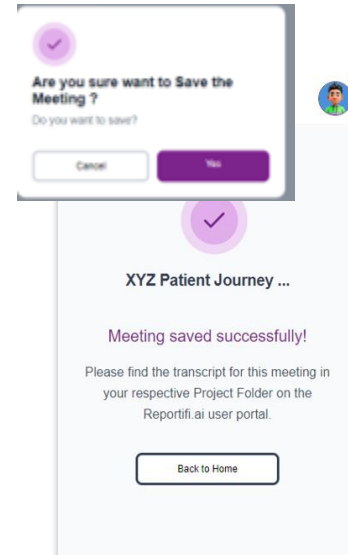
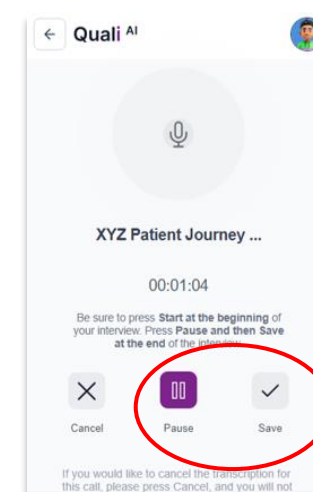
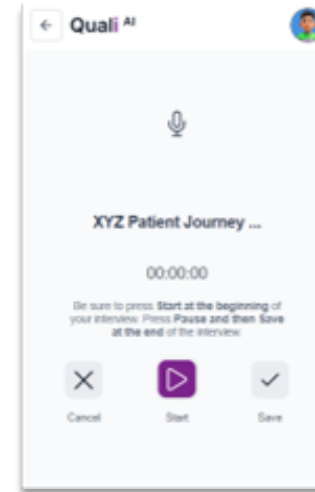
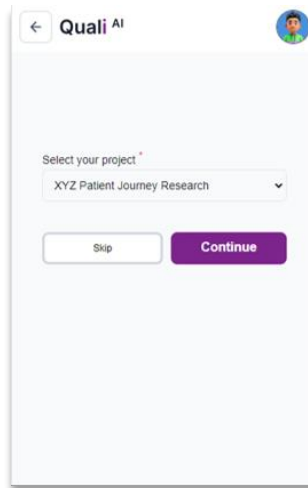
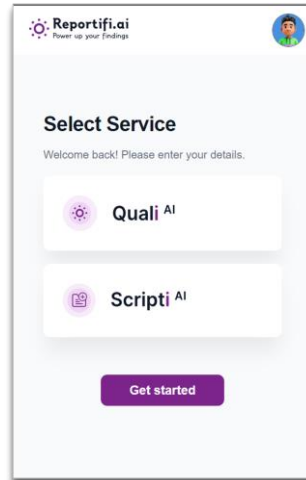
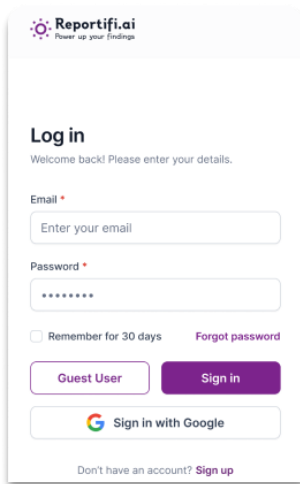
1. Click on the “Add to Chrome” button from the Reportifi.ai website or visit the Chrome Web Store and search for Reportifi.ai
2. Click on “Add to Chrome” from the Google Chrome Web Store
3. The Reportifi.ai Chrome Extension will be added to Chrome

Tip: You can pin it, so the icon remains visible!



Step 5: Using the Extension during an Interview

You must open your Zoom or Google Meet meeting in your Chrome browser for the extension to work. Do not open the meeting from the app.



Log in to the Reportifi.ai Extension at the beginning of your interview. You must open the extension while you are in your Zoom or Google Meet meeting

Select Quali AI and press “Get Started”

Select your project and press “Continue”

Press “Start” to start recording of the transcript before beginning the interview*

At the end of the interview, before you log off, open the Reportifi.ai Extension again and press “Pause” and then “Save”

Click “Yes” to confirm saving. You will see a confirmation that the transcript has been saved.

- Reportifi.ai only records transcripts. Audio recordings will need to be recorded directly from Zoom or Google Meet
- In Zoom, if the Chat window is opened during the meeting, transcripts will pause recording and will only continue when the chat window is closed.

Step 6: See Results in Your Project Folder

Log back in to your Reportifi.ai account. In your project folder, you will have Transcriptions, Summaries (Executive, Interview Questions, and Key Business Summaries) and Top-line slides*

Transcripts

Transcription	Status	Date
Patient Interview #2 transcription_452.json	Completed	Apr 15, 2024, 9:27 PM
Patient Journey Research Interview transcription_451.json	Completed	Apr 15, 2024, 8:32 PM

Summaries

Executive Summary

Study Objectives

- Objective #1** Develop a granularly profile of the patient and to gain an understanding of the patient's current lifestyle and environment
- Objective #2** Develop an understanding of the patient's current state of health and their level of knowledge of XYZ, identify their current ailments, beliefs, and opinions about general health and living with XYZ
- Objective #3** Develop a deeper understanding of the patient experience with diagnostic testing, doctor visits, and managing their treatment plans.
- Objective #4** Investigate the patient experience with associated medications used to identify potential barriers to adhering to prescribed medications.
- Objective #5** Identify patient treatment goals and desired features and benefits of potential new

Key Findings

Overall summary

Research on patient experiences with the medical condition XYZ highlights several trends: increased awareness and engagement with physicians, underscoring the need for reassurance and practical health advice. The quest for well-being is punctuated by fatigue and the responsibility of symptoms. However, increased awareness and support resources inspire individuals with resilience. Notably, younger patients may lack emotional readiness for their initial diagnosis, suggesting tailored support and a sponsor for early emotional responses to health challenges. Ongoing patient support from healthcare staff fosters positive acknowledgment, whereas interactions with care quality and an informative communication style. Families exhibit differential approaches towards medical decisions, while others seek more extensive information. In terms of treatments, there is a significant interest in exploring genetic-based diagnostic tests, especially around targeted interventions. Personal achievements and clear goals are cited as a source of pride among the respondents. Patients also report variability in healthcare interactions, with some meeting the healthcare team frequently and others not as often. In some cases, respondents shared a mix of emotions, such as a common part of routine check-ups, though one respondent shared a mix of emotions. These findings are necessary to inform the design of XYZ, their frequency and impact on daily life vary, with some receiving multiple visits a year.

Implications

The documented experiences and expectations underscore the complexity of living with XYZ.

Considerations

While aspirations towards improved treatments are evident, considerations around

Interview Question

Thinking about your family and friends, those that are closest to you, how would they describe your personality?

What has been the greatest accomplishment in your life? How long ago did this happen?

In your own words, describe for me what you think it means to be healthy?

Thinking about your overall health, are you currently looking to do more to improve your health? If so, what are the most important things you can do to improve your health? If not, what are the most important things you can do to improve your health?

How does this change impact your overall health? Is it higher or lower? What factors contribute to this change?

Based on the information you provided previously, you indicated that you have been diagnosed with a condition called XYZ. In your own words, describe for me what the condition is?

When talking with your family members or friends, how do you refer to this condition?

Respondent Answers

Questions Summary

Being healthy encompasses both the absence of illness or disease and a broader state of complete well-being. It implies not only being free from the need for medications or medical assistance but also entails a significant mental or emotional component. According to this view, genuine health is not solely a physical condition; it is also intrinsically linked to happiness. Mental contentment is an integral part of the concept of health that even if one's body is free from ailments, the presence of sadness or depression would negate a state of true health. Therefore, being healthy involves a harmonious balance of both physical and mental wellness, enabling a person to live happily.

Respondent 1

The speaker defines being healthy in terms of happiness, emphasizing that a sad or depressed person cannot be truly healthy. A healthy individual, to them, is someone who is both free of disease and mentally happy.

Respondent 2

Being healthy, in the speaker's words, means the absence of illness or disease and

Key Business/Other Questions

How does cost impact treatment per the patient's perspective?

What are the current treatments that patients are currently taking to treat their XYZ? How satisfied are they with these treatments?

What is the unmet need for treatment of XYZ?

How does having XYZ impact patients' emotional well-being?

What do patients discuss with their physicians during a routine visit?

Respondent Answers

Questions Summary

Cost is a formidable obstacle to treatment from the patient's standpoint, prominently featuring as a significant barrier due to substantial out-of-pocket expenses, which can amount to as much as \$12,000 annually. Patients experience financial strain as a result of insurance plans that only offer partial coverage for their treatment needs. The high cost of medication is a predominant concern, often characterizing the foremost hurdle in accessing care. This financial pressure is an ongoing challenge that exerts considerable stress on patients, underscoring the critical impact of cost on the accessibility and

Top-Line Slides

* Transcriptions will read **Completed** when transfer is complete. Summaries and slides can take up to an hour to generate. When new interviews are added, you can refresh the summaries when you wish to update them.

Step 6: See Results in Your Project Folder

Summaries and slides can take up to an hour to generate. When new interviews are added, you can refresh the summaries when you wish to update them.

The screenshot displays the Reportifi.ai interface. On the left is a dark purple sidebar with the logo and navigation menu. The main content area is titled 'Executive Summary' and features a progress bar with four steps:

- Step 1: Meetings added** (Completed)
- Step 2: Objectives added** (Completed)
- Step 3: Interview questions added** (Completed)
- Step 4: Summary is generating...** (Processing)

The progress bar shows the first three steps as completed with green indicators, while the fourth step is in progress with a purple indicator. The reason for the current status is 'Reason: Summary generation initiated'.



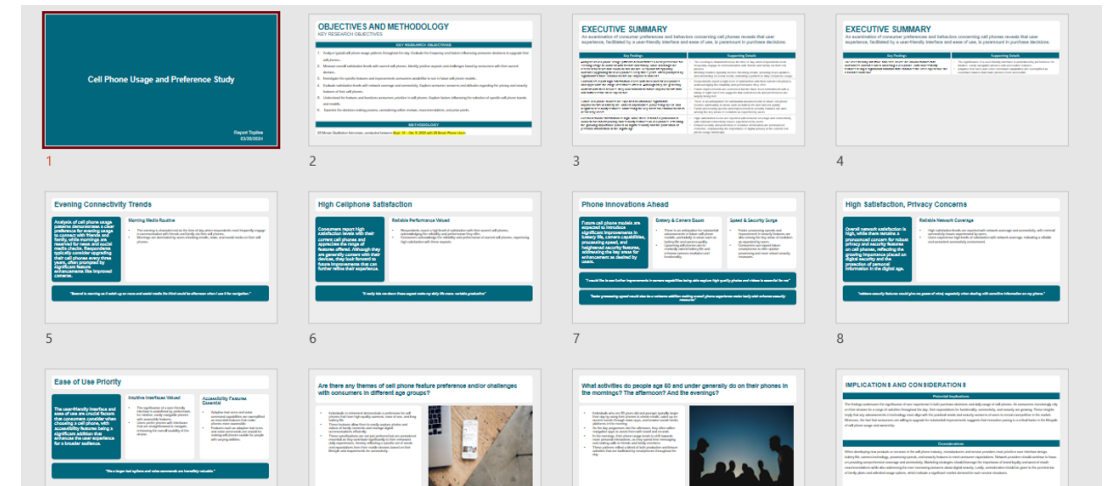
Step 6: See Results in Your Project Folder (cont.)

Transcripts, Responses, Summaries, and Slides are all downloadable!

Summary and Response grid is downloadable to a .xlsx file

A	B	C	D
	1. Do you have a preferred cell phone brand? If yes, why? 1.1. Are there specific models that you prefer or have had positive experiences with?	2. How satisfied are you with the network coverage and connectivity of your current cell phone provider?	3. How long have you been using a personal cell phone? 3.1. Are there specific features or functions you prioritize in a cell phone?
Question Summary	The respondent expressed a preference for Google phones, indicating that they value the simplicity and user-friendliness of these devices. The preference is also influenced by the Android operating system, which the respondent finds to be well-suited to their needs. The combination of straightforward design and a compatible software environment contributes to their brand loyalty towards Google phones.	The respondent is generally content with the network coverage and connectivity offered by their current cell phone provider. They have not encountered significant problems in terms of connectivity, which adequately meets their requirements, particularly since their primary use of the service involves making calls and sending texts, which does not necessitate extensive or high-demand data usage.	The respondent has a history of using a personal cell phone that spans approximately 20 years. Throughout this time, their preferences have leaned towards a phone that embodies simplicity and user-friendliness. Key features that they prioritize include large buttons and a clear screen, underlining the essential need for ease of use when making calls and sending text messages.
Respondent: 1	The respondent has been using Google phones because they find them straightforward and appreciate the Android operating system, as it	The respondent is reasonably satisfied as they haven't faced significant issues with network coverage, but mainly uses it	The respondent has been using a personal cell phone for about 20 years now. In terms of specific features or functions, the

Top-Line Slides are downloadable to a .pptx file (you can customize color and fonts before download)



Navigating the Dashboard

When you select your project, the project will show in the purple left-hand bar

Access your Transcripts, Summaries (including question responses), and Report Slides

Purchase additional interview credits

The screenshot shows the Reportifi.ai dashboard interface. On the left is a purple sidebar with navigation options: Quali AI, XYZ Patient Journey, Transcriptions, Summaries, Report Slides, Scripti AI, Archive, Account Settings, and Payment. Below these is a 'Quali AI' section with a progress indicator for interviews. The main area is titled 'Reportifi Dashboard' and 'Project Details', featuring a search bar and a table of projects. A callout box highlights the 'Transcripts' and 'Slides' icons in the table's action column, with arrows pointing to 'Review/Edit Project inputs' and 'Summaries' callouts. Another callout points to the 'Archive Project' icon. A '+ New Project' button is in the top right.

Projects	Start Date	Industry	No.Of.Trans	Progress	Transcripts	Slides
XYZ Patient Journey Project 2	Jun 22, 2024, 12:45 PM	Healthcare & Pharmaceuticals	0/7	<div style="width: 0%;"></div>		



Purchasing Interview Credits

- 1. Your first 3 interviews are free with Quali^{AI}.* You will need to use your free interviews before purchasing. Once you make a purchase, the free interview credits are not accessible.**
 - ✓ The outputs (transcripts, summaries, and slides) are not downloadable with the free interviews. They are downloadable once an additional interview purchase is made.
 - ✓ The free interview credits are not shown in the Quali^{AI} interview counter on the dashboard page.
- 2. There are several ways to purchase additional interviews, either:**
 - ✓ On the Reportifi.ai website, click on “**Get Started**” near the Quali^{AI} pricing options.
 - ✓ On the Reportifi.ai app dashboard, click on “**Add more**” to the Quali^{AI} interview counter.
 - ✓ On the Reportifi.ai app dashboard, click on “**Payment**” to purchase additional interviews.
- 3. After your first 3 free interviews, before starting your 4th interview using the Chrome Extension, you will need to have interview credits available in your account.**
 - ✓ Otherwise, you will get a message on the Extension to purchase additional credits for your account.

Tips for Conducting Interviews on Zoom

- ✓ Log in to your Zoom meeting on your Chrome browser ~5-10 minutes before your interview starts.
 - Be sure to be logged into your Chrome browser with the email that matches your Google account where you downloaded the Extension
 - Ensure you don't have any other Zoom sessions open from previous meetings
- ✓ Ask participants/observers to put their initials or first name only in their Zoom profile when they join and to remove any profile pictures. Or, as the host, you can also rename any guests that join when they are in the waiting room before they join the meeting
 - To rename a participant, click More next to their name. In the drop-down menu, click Rename, enter their initials or first name, then click Change
 - Rename participants before starting transcript recording. **Do not revise names mid-way through the meeting, as you may lose part of your transcript**
- ✓ Be sure to inform your participants that you are recording transcripts for the interview (if you want an audio recording, it will need to be recorded from the meeting platform). A notification also comes up to make participants aware.
 - Start the audio recording from the meeting platform.
 - To start transcription, Log-in to the Reportifi.ai Chrome Extension, select Quali^{AI} and select your project. Remember to press Start before starting an interview. You will see the timer activated when it begins. Don't close the Extension window until you see the timer start.



Quali^{AI} Demo

Demo of XYZ Patient Journey Research

Project Set-up for XYZ Patient Journey

1. **Existing Interview Guide was uploaded and formatted with the AI formatter. The section Roman Numeral numbers were removed from the Guide before uploading (see next slide)**
2. **PDF of Research stimuli was uploaded. Stimuli image will show in the appendix slides of the report**
3. **The following Research Objectives were added:**
 - ✓ Develop a personality profile of the patient and to gain an understanding of the patient's current lifestyle and environment
 - ✓ Develop an understanding of the patient's current state of health and their level of knowledge XYZ, identify their current attitudes, beliefs, and opinions about general health and living with XYZ
 - ✓ Develop a deeper understanding of the patient experience with diagnostic testing, doctor visits, and managing their treatment plans
 - ✓ Understand the patient experience with accessing medications and to identify potential barriers to adhering to prescribed medications
 - ✓ Identify patient treatment goals and desired features and benefits of potential new products indicated for the treatment of XYZ
 - ✓ Understand patient's perspective on the use of a potential new treatment option for XYZ
4. **Key Business Questions were added:**
 - ✓ How does medication and treatment cost impact treatment per the patients' perspective?
 - ✓ What are the current treatments that patients are currently taking to treat their XYZ? How satisfied are they with these treatments?
 - ✓ How do patients feel about their current treatments?
 - ✓ What is an unmet need for treatment of XYZ?
 - ✓ How does having XYZ impact patients emotional well being?
 - ✓ What do patients discuss with their physician during a routine exam?
 - ✓ What routine lab tests do patients typically get and how frequently do they get them?

The screenshot shows the 'XYZ Patient Journey' project setup page. At the top, the project name 'XYZ Patient Journey' is displayed under the category 'Healthcare & Pharmaceuticals'. To the right, it shows '7' interviews, a 'Project Unicode' of 'VGC60292', and a 'No. Of Interviews' field. Below this, there are sections for 'Interview Guide', 'Research stimuli', 'Objectives', and 'Key Business or Other Questions'. Each section has a 'Click to upload or drag and drop' button. The 'Objectives' section includes a text input field for 'Enter objectives' (0/500) and a 'Previous Objectives' dropdown. The 'Key Business or Other Questions' section includes a text input field for 'Enter your question' (0/500) and a 'Business questions' dropdown. At the bottom, there is an 'Add new User' button, a 'Cancel' button, and a 'Continue' button.

Discussion Guide uploaded for XYZ Patient Journey

Uploaded Existing Discussion Guide (removed section numbers)

Example Discussion Guide

Respondent introduction – Let’s take a few minutes and talk a little about yourself. As we go through the interview, please know that there are no right or wrong answers. We simply seek your honest, candid feedback. Please be as detailed as possible in your responses.

Objective: Primarily to develop a personality profile of the patient and to gain an understanding of the patient’s current lifestyle and environment.

1. Tell me a little about yourself.
 - a. Are you married or single?
 - b. Who currently lives at home with you?
 - i. Children? Grandchildren? Others?
 - c. How do you spend your free time...What are your hobbies? What kinds of things do you enjoy doing during your free time?
 - d. Describe the area where you live (rural, suburban, urban)?
2. Are you currently employed?
 - a. Full-time, part-time?
 - b. How long have you been in your current job?
 - c. What do you like most/least about what you do?
3. Thinking about your family and friends, those that are closest to you, how would they describe your personality?
4. What has been the proudest accomplishment in your life? How long ago did this happen?

Objective: Develop an understanding of the patient’s current state of health and their level of knowledge of XYZ, identify their current attitudes, beliefs, and opinions about general health and living with XYZ.

5. In your own words, describe for me what you think it means to be healthy?
6. Thinking about your overall health, rate your current health on a 10-point scale, how good or bad would you rate your health today, in your opinion? The best state you can imagine would be marked 10 and the worst state you can imagine would be marked a 1.
 - a. _____ (1-10) Please explain your rating. [Moderator – Probe to understand why the respondent gave this particular rating and what it means to the patient to be “healthier”.]



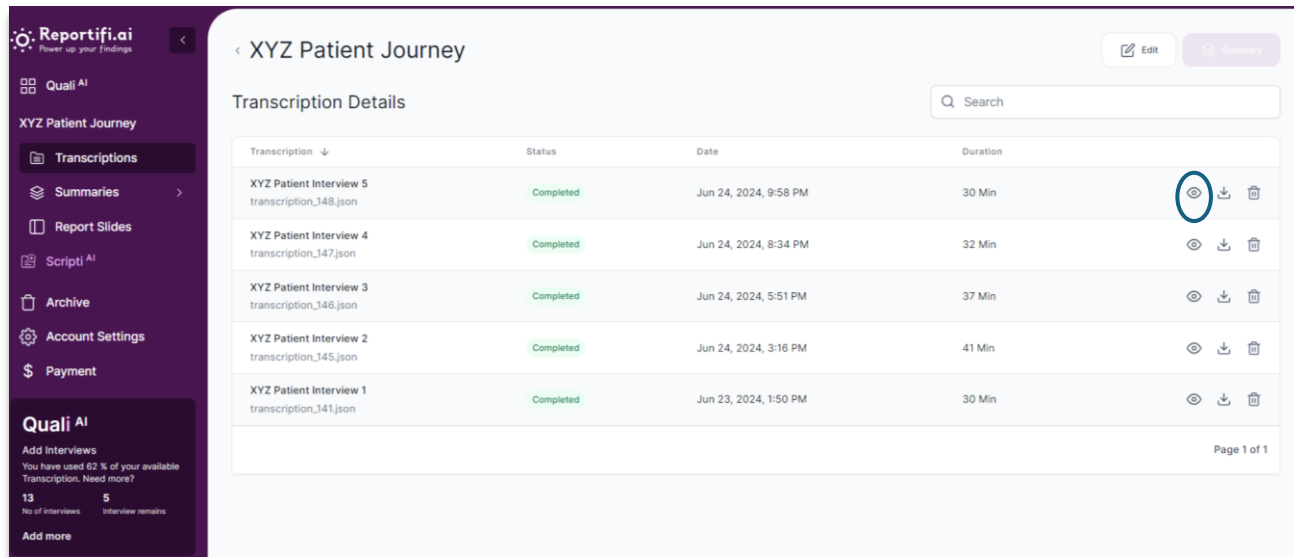
Questions were auto formatted for Quali^{AI} using the AI formatter

Interview Question

- 1 Tell me a little about yourself.
 - 1.1 Are you married or single?
 - 1.2 Who currently lives at home with you?
 - 1.3 Children? Grandchildren? Others?
 - 1.4 How do you spend your free time...What are your hobbies?
 - 1.5 What kinds of things do you enjoy doing during your free time?
 - 1.6 Describe the area where you live (rural, suburban, urban)?
- 2 Are you currently employed?
 - 2.1 Full-time, part-time?
 - 2.2 How long have you been in your current job?
 - 2.3 What do you like most/least about what you do?
 - 2.4 If today, you could pick any job you wanted, which job would you pick? Why do you prefer this job? What keeps you from doing this job today?
- 3 Thinking about your family and friends, those that are closest to you, how would they describe your personality? >
- 4 What has been the proudest accomplishment in your life? How long ago did this happen? v
- 5 In your own words, describe for me what you think it means to be healthy? v
- 6 Thinking about your overall health, rate your current health on a 10-point scale, how good or bad v

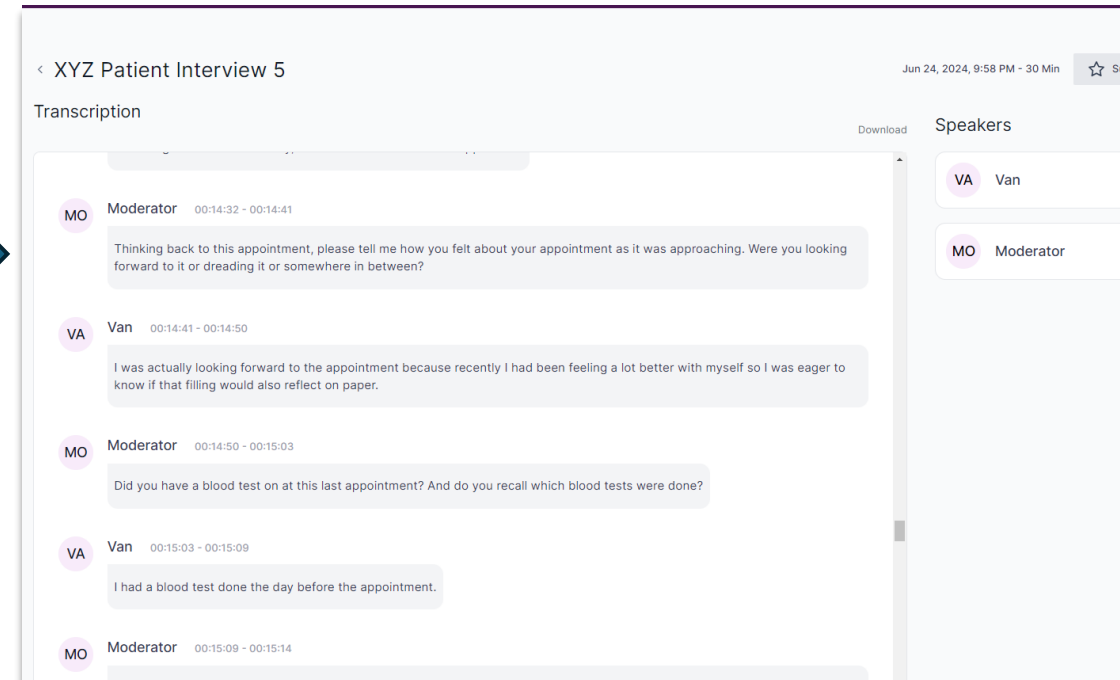
Output following 5 interviews conducted on Zoom

Transcriptions



The screenshot shows the 'XYZ Patient Journey' page with a 'Transcription Details' table. The table lists five interviews with their respective dates, durations, and completion statuses. A blue circle highlights the download icon for the first interview, 'XYZ Patient Interview 5'.

Transcription	Status	Date	Duration
XYZ Patient Interview 5 transcription_148.json	Completed	Jun 24, 2024, 9:58 PM	30 Min
XYZ Patient Interview 4 transcription_147.json	Completed	Jun 24, 2024, 8:34 PM	32 Min
XYZ Patient Interview 3 transcription_146.json	Completed	Jun 24, 2024, 5:51 PM	37 Min
XYZ Patient Interview 2 transcription_145.json	Completed	Jun 24, 2024, 3:16 PM	41 Min
XYZ Patient Interview 1 transcription_141.json	Completed	Jun 23, 2024, 1:50 PM	30 Min



The screenshot shows a detailed view of a transcription for 'XYZ Patient Interview 5'. The transcript is presented in a chat-style format with speaker identification (MO for Moderator, VA for Van) and timestamps. The transcript content includes:

- MO Moderator** 00:14:32 - 00:14:41: Thinking back to this appointment, please tell me how you felt about your appointment as it was approaching. Were you looking forward to it or dreading it or somewhere in between?
- VA Van** 00:14:41 - 00:14:50: I was actually looking forward to the appointment because recently I had been feeling a lot better with myself so I was eager to know if that filling would also reflect on paper.
- MO Moderator** 00:14:50 - 00:15:03: Did you have a blood test on at this last appointment? And do you recall which blood tests were done?
- VA Van** 00:15:03 - 00:15:09: I had a blood test done the day before the appointment.
- MO Moderator** 00:15:09 - 00:15:14: (partial text)

1. Transcripts identify speakers and timestamps
2. Each transcript is downloadable to a .docx file.
3. Interview name (e.g., XYZ Patient Interview 5) is pulled from the Zoom meeting name

Output following 5 interviews conducted on Zoom

Executive Summary

Reportifi.ai
Power up your findings

Quali AI

XYZ Patient Journey

Transcriptions

Summaries

Executive Summary

Interview Questions

Key Business/Other Qs

Report Slides

Scripti AI

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Add Interviews

You have used 62% of your available Transcription. Need more?

13 No. of interviews 5 Interview remains

Add more

Executive Summary

Transcriptions Report Slides

Export to Document

Study Objectives

Objective #1

1. Develop a personality profile of the patient and to gain an understanding of the patient's current lifestyle and environment.

Objective #2

2. Develop an understanding of the patient's current state of health and their level of knowledge XYZ, identify their current attitudes, beliefs, and opinions about general health and living with XYZ.

Objective #3

3. Develop a deeper understanding of the patient experience with diagnostic testing, doctor visits, and managing their treatment plans.

Objective #4

4. Understand the patient experience with accessing medications and to identify potential barriers to adhering to prescribed medications.

Objective #5

5. Identify patient treatment goals and desired features and benefits of potential new products indicated for the treatment of XYZ.

Key Findings

Overall summary

The research findings provide a comprehensive overview of participants' experiences living with and managing the XYZ condition. Respondents varied in their awareness of treatments in development and indicated diversified experiences with symptom changes over time, with some reporting drastic shifts in symptoms and others experiencing gradual changes. The condition of living with XYZ was equated to significant challenges, underlining the severity of the disease's impact on individuals. Daily administration of medications with relatively simple treatment plans is common practice. Patient satisfaction with discussions around their health condition is generally high, with the primary hope being for advancements in treatments. Patients' health statuses ranged from 4 to 7 (on a scale of 10), indicating moderate health conditions. The emphasis of the discussions during routine exams was on their current health status and treatment plans. Respondents not only focused on physical wellbeing but also on their mental health, highlighting the concept of health as a combination of both physical and mental well-being. Various employment statuses among respondents were recorded, indicating that the condition does not necessarily inhibit full-time employment for everyone. The narratives depict resilience and adaptation in the face of the chronic condition, demonstrating that patients are continually striving to live full lives despite the challenges presented by XYZ. Routine blood tests are crucial to managing the condition; they guide the treatment plan and give a clear indication of the disease's progression. While treatment regimens vary, satisfaction levels range from moderate to high. Some patients express full satisfaction with their treatments, while others cite side effects and ongoing struggles with the disease as factors that negatively impact their satisfaction. There was an overall optimistic response towards the new treatment Product X, with fewer side effects and potentially life-changing impacts. Costs related to treatment can significantly impact some patients, emphasizing the need for affordable treatment options. The scheduled visits to healthcare providers generally went positively and increased patient understanding of the disease, whilst yielding no major concerns. Respondents identified an unmet need for effective treatment options with less severe side effects and better symptom management. Generally, respondents expressed a hopeful outlook towards their health in future years and identified a widespread acceptance of their disease and

Implications

The findings imply a significant demand for new treatments for XYZ disease that are less invasive and easier to administer, with a strong preference for options with less dependency on blood transfusions and fewer side effects. Patient satisfaction with the extent of discussion about their health condition indicates positive communication with healthcare providers; however, there's a clear call for more innovative treatment practices and improvements in accessing medication to better manage the disease. Understandably, patients would also like to see advancements in science and technology that would result in more convenient, user-friendly treatment options. Some respondents face economic challenges in managing their condition, implying a clear need for insurance plans that cover a substantial part of the treatment costs. Overall, living with XYZ requires a comprehensive approach that includes medical, dietary, and lifestyle strategies. Hence, opportunities exist for support services that cater to these various needs and potentially policy changes to make treatments more affordable and accessible.

Considerations

Based on the findings, it is clear that individuals living with XYZ face both physical and emotional challenges. Therefore, any new treatment development should also take into account these emotional and mental health aspects. Patients also highlighted the constant challenges presented by their condition, which need to be addressed in new treatments alongside specific symptom-focused treatment. Attention should be paid to after-effects, routine administration details, and overall patient comfort with treatments. There is a strong need for healthcare providers to continue promoting open and engaging discussions around patients' health statuses, reassuring patients and encouraging their active participation in managing their disease. Financial constraints are a notable concern for some patients, and this indicates a need for either more affordable treatment options or better health insurance coverage to ensure treatment accessibility and sustainability.

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Interview Question Response Organization and Summaries

Interview Question Summary

Transcriptions Report Slides

Interview Question

Respondent Answers [Export to Document](#)

8.5 Do you remember approximately how many doctor visits you had before you were diagnosed?

8.6 What were some of your thoughts or feelings you experienced at the time of your initial diagnosis?

8.7 How do you feel the doctors and nurses dealt with you? What support did they offer?

8.8 Describe how being diagnosed XYZ impacted you, at the time of diagnosis.

9 I'd really like to better understand what life has been like for you living with XYZ. >

9.1 Thinking back to when you were initially diagnosed, how did life initially change for you?

9.2 Since that time, how has life changed for you? Have things gotten better or worse since your initial diagnosis?

9.3 What are the most debilitating symptoms you experience? How does that impact what you are able to do on a daily basis?

9.4 What is most frustrating about living with XYZ? Why?

10 In addition to your XYZ, are there other health conditions you are also currently managing? v

10.1 Are you taking medications to treat any of these health conditions?

11 Where do you see your health in the next 5 to 10 years? v

11.1 Which complications are you most concerned about?

12 I am going to read some partial statements to you. I would like for you to complete the statement with whatever words or phrase that first comes to mind. v

12.1 Living with XYZ is like...

12.2 My last visit to the doctor was like...

12.3 Getting better results from my treatments for XYZ would be like...

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Questions Summary

Living with XYZ condition has posed a variety of challenges and lifestyle adjustments for those who shared their experiences. Initially, individuals faced a mix of symptoms like infections, serious symptoms, tiredness, weakness, back and leg pain, and stunted growth, which disrupted normal activities like attending school, performing physical work, and maintaining energy levels for daily tasks. While the condition necessitated regular medical interventions like blood transfusions, medication routines, and hospital visits, as well as accommodations such as dietary changes and exercise habits, respondents reported improvements in their conditions. The emotional toll included feelings of frustration from being pitied or appearing weak to others, the monotony of treatments, and a longing for normalcy in physical stature. Despite these difficulties, respondents have found solace in activities like meditation, cooking, and dancing, and have drawn strength from familial support and personal achievements such as educational success and employment recognition. These narratives paint a picture of resilience and adaptation in the face of the chronic condition, with individuals striving to maintain a balance between health management and pursuing a fulfilling life.

Respondent 1

Upon initial diagnosis as a child, the respondent's life changed with more frequent infections and serious symptoms affecting daily activities, such as being admitted late to school. Improvements have occurred since diagnosis due to increased parental attention to health. Fatigue is the most debilitating symptom, affecting the respondent's ability to perform physical work and occasionally leading to missed classes. Meditation is used as a tool for managing frustration associated with living with the condition.

Respondent 2

Respondent experienced a significant change in both physical and mental status after being diagnosed with XYZ. Before adopting a proper medication routine and receiving support from family and doctors, respondent's lifestyle had drastically declined. However, once on the treatment plan, there was some improvement in respondent's life. The most debilitating symptoms mentioned are back pain, laziness, fatigue, and leg pain, which lead to feeling low and have a pervasive impact on daily activities. The most frustrating aspect of living with XYZ for respondent is the necessity of blood transfusions, which are described as monotonous and painful both physically and mentally.

Respondent 3

Life for the respondent living with XYZ initially changed with various symptoms that troubled a lot. Over time, life has improved as the respondent has accepted the condition and learned to manage it. The most debilitating symptoms include extreme tiredness, weak bones, and pale skin, which limit routine activities and overall energy levels. The most frustrating aspect of living with XYZ is being pitied and presumed weak by others, which leads to a form of treatment that the respondent despises.

Respondent 4

Output following 5 interviews conducted on Zoom

Key Business Question Summaries

Key Business/Other Questions

Transcriptions Report Slides

Questions Respondent Answers [Export to Document](#)

1. How does medication and treatment cost impact treatment per the patients perspective? >
2. What are the current treatments that patients are currently taking to treat their XYZ? How satisfied are they with these treatments? v
3. What is an unmet need for treatment of XYZ? v
4. How does having XYZ impact patients emotional well being? v
5. What do patients discuss with their physician during a routine exam? v
6. What routine lab tests do patients typically get and how frequently do they get them? v
7. How did patients feel about their current treatments for XYZ? v

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Questions Summary

Responses indicate varied experiences with medication and treatment costs and their impact on patient care from negligible to substantial. One respondent is unaffected due to comprehensive health insurance that pays for all expenses, eliminating out-of-pocket costs. In contrast, others experience considerable financial strain, with treatment costs constituting a significant portion of their earnings, as high as 20%, or leaving them with heavy out-of-pocket expenses even after insurance contributions. Expenditures range from \$700 annually to \$3,000-\$4,500 per visit every few months, and can skyrocket to \$5,000-\$12,000 for treatments for one individual without insurance at all. These costs can create extreme pressure and necessitate financial planning, particularly for those from middle-class backgrounds. While one respondent is not heavily burdened by costs, they are still mindful of expenses. Overall, cost is a critical factor affecting treatment adherence and decisions for most patients.

Summaries and organized responses are all downloadable into one workbook file

Downloaded Spreadsheet Workbook (.xlsx) Includes:

- ✓ Executive Summary tab that includes summaries aligned to research objectives and potential implications and considerations
- ✓ Interview Questions Summaries tab that include organized responses from all interviews
- ✓ Key Business & Other Questions Summaries tab

The screenshot displays a Microsoft Excel spreadsheet with the following content:

- Formulas Bar:** G2: Overall, the health ratings provided by respondents ranged from 4 to 7 on a 10-point scale, indicating overall moderate health statuses. Some contributors, rating themselves low (4 out of 10), reported that their health had slightly improved over time due to better acceptance and response to treatment. However, others indicated little to no change in their ratings, attributing this to a balance between the decline in their physical health and improvements in their mental health. One individual scored their health status as average (5 out of 10), acknowledging feelings of fatigue and restlessness but maintaining the rating due to the willpower to fight these weaknesses. The highest rating, a 7 out of 10, was assigned by a respondent who acknowledged the negative effects of their disease's symptoms on their health and quality of life yet felt not in the worst-case scenario condition. They also stated that this assessment has stayed consistent over the years due to
- Worksheet Grid:**

	A	G	H
1		6. Thinking about your overall health, rate your current health on a 10-point scale, how good or bad would you rate your health today, in your opinion? 6.1. Please explain your rating. 6.2. Has this rating changed for you over the years? Did it use to be higher or lower? What happened over the years that led to the change?	7. Based information you previously provided, you indicated that you have been diagnosed with a condition called XYZ. In your own words, describe for me what this condition is? 7.1. When talking with your family members or friends, how do you refer to this condition?
2	Question Summary	Overall, the health ratings provided by respondents ranged from 4 to 7 on a 10-point scale, indicating overall moderate health statuses. Some contributors, rating themselves low (4 out of 10) due to the negative impacts of health conditions, reported that their health had slightly improved over time due to better acceptance and response to treatment. However, others indicated little to no change in their ratings, attributing this to a balance between the decline in their physical health and improvements in their mental health. One individual scored their health status as average (5 out of 10), acknowledging feelings of fatigue and restlessness but maintaining the rating due to the willpower to fight these weaknesses. The highest rating, a 7 out of 10, was assigned by a respondent who acknowledged the negative effects of their disease's symptoms on their health and quality of life yet felt not in the worst-case scenario condition. They also stated that this assessment has stayed consistent over the years due to	XYZ is described as a genetic disorder characterized predominantly by the deficiency of hemoglobin in the red blood cells, which leads to a serious, life-altering disease related to blood. This deficiency results in an inadequate oxygen supply to the body, often leading to extreme fatigue and lower energy levels. The disease lowers life expectancy and requires immediate and consistent management due to its chronic nature. It is a condition that results in a decreased synthesis of hemoglobin chains, causing severe anemia, and impacting the overall functioning of the body's organs. In simpler terms, XYZ prevents blood cells from carrying sufficient oxygen to the body's tissues, hence causing health complications.
3	Respondent: 1	The respondent rated their current health as a 6 on a 10-point scale, justifying this rating by acknowledging that while their condition precludes them from saying they are healthy, they also recognize they do not have the worst-case scenario. The respondent also mentioned that this self-assessment hasn't really changed over the years; the respondent has maintained this type of mindset since the beginning of everything.	The respondent describes XYZ as a genetic disorder characterized by a lack of hemoglobin in the red blood cells. When discussing this condition with family and friends, the respondent refers to it as a deficiency of hemoglobin in the blood.
4	Respondent: 2	The respondent rates their current health at 4 points on a 10-point scale, explaining that they are suffering from XYZ, which has diminished physical well-being and accounted for the deduction of the remaining 6 points. Over the years, the health rating has not changed significantly from the time of diagnosis, where it was similar, around 3 or 4. With the onset of treatment, some aspects improved, but there is still a long way to recovery.	The condition known as XYZ is described as a blood-related disease in which the body produces less hemoglobin than normal. This hemoglobin shortage means inadequate oxygen in the body, contributing to lower energy levels and causing fatigue most of the time.
5	Respondent: 3	The respondent would give their health a rating of 7 on a 10-point scale, indicating that it's not very healthy due to	XYZ is a chronic disease, a blood disorder that leads to reduced synthesis of chains of hemoglobin and

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Top-Line Report Slides Generated For This Research Included:

- ✓ 1 Objectives and Methodology slide
- ✓ 3 Executive Summary Slides
- ✓ 7 Key Findings Slides (includes some quotes from the research)
- ✓ 6 Slides summarizing the findings to Key Business Questions (note, images are FPO only)
- ✓ 2 slides summarizing potential implications and considerations
- ✓ 1 slide showing the research stimuli

Slides are downloadable to a .pptx file

EXECUTIVE SUMMARY
"Living with XYZ: Patients' Experiences and Treatment Perspectives"

Key Findings

- Respondents to the research data reported their symptoms changing over time, including shifts from fatigue to extreme exhaustion and dizziness.

Supporting Details

Patient Treatment Preferences

Patients with XYZ condition seek treatments with fewer side effects, a reduction in transfusions, convenient dosing, and improved quality of life, while facing various symptom changes over time.

"Fatigue is the most influencing symptom"

"Definitely things have changed diagnosis"

Symptom Variability

- Respondents reported a variety of symptom changes, with general symptoms including fatigue, headache,

Medication Adherence

- Evidence of respondents expressing a need for effective and side-effect-free therapies is found in the research data as.

5. What do patients discuss with their physician during a routine exam?

- During a routine exam, patients primarily discuss their current health status, existing symptoms, ongoing treatments, and any concerns or questions regarding their medical conditions or medications with their physician
- In addition, topics such as medication side effects, effectiveness of current treatments, results of recent lab tests, possible treatment adjustments, and overall progress are commonly addressed
- These discussions may also extend to routine, blood reports, specific blood cell and iron counts, and the management of results
- Furthermore, patients may also discuss their treatment plans and stabilization measures, such as hemoglobin levels
- Other key topics can include the medical impact of the condition on daily life and on health management.

IMPLICATIONS AND CONSIDERATIONS

Potential Implications

- The findings imply a significant demand for new treatments for XYZ disease that are less invasive and easier to administer, with a strong preference for options with less dependency on blood transfusions and fewer side effects.
- Patient satisfaction with the extent of discussion about their health condition indicates positive communication with healthcare providers; however, there's a clear call for more innovative treatment practices and improvements in accessing medication to better manage the disease.
- Understandably, patients would also like to see advancements in science and technology that would result in more convenient, user-friendly treatment options.
- Some respondents face economic challenges in managing their condition, implying a clear need for insurance plans that cover a substantial part of the treatment costs.
- Overall, living with XYZ requires a comprehensive approach that includes medical, dietary, and lifestyle strategies.
- Hence, opportunities exist for support services that cater to these various needs and potentially policy changes to make treatments more affordable and accessible.

It is important to note that slides are AI generated so please don't expect that they will be perfect and ready to use for client presentation. Slides are intended to serve as a starting point for human analysis & reporting.



Thank you for learning more about Quali^{AI}!

Please email support@reportifi.ai with any questions.