



AccrediRate

Jul. 2011 - Sept. 2013

scenario

Accreditation Canada has hundreds of volunteer health care professionals (auditors) who evaluate healthcare provider compliance with Accreditation Canada's quality of care and patient safety standards. Every week, the organization conducts several on-site visits (via the auditors) at provider locations across Canada.

Auditors gather data during these visits and input it in Windows-based software, called Surveyor Software (Surveyor, for short).

By 2011, the software was several years old and the experience for auditors was poor due to:

- Long and complex installation process requiring multiple software packages often requiring calls to technical support
- Software was fully disconnected from the internet but required data sharing between team members using USB sticks
- Software only supported for Windows laptops when many auditors wanted Mac and iPad support.

project details

My role: Concept development, business analysis, technology research, user research

Deliverable: Web application

Devices: Desktop, tablet

design activities

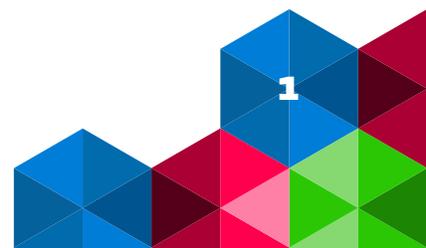
Concept Design

Task Analysis

User Surveys

User Interviews

Field Studies



action

We had to identify all of the data required for the audit process, what clients expect to get following the audit process, and validate our assumptions about how our auditors worked in the field.

To do this, we dispatched a survey to auditors to learn about the devices they used and planned on using in the next few years, conducted task analyses and interviewed auditors about their work.

Next, we spent a week in the field with auditors for observation. This allowed us to corroborate the information gathered and experience first hand how auditors interacted with our legacy software (work performed, efficacy, efficiency, pain points, etc.).

We then used all this evidence to inform design for prototypes that we built for the new app, called AccrediRate.

result

AccrediRate was successfully rolled out for use in fall of 2013.

- Zero installation required. Zero fuss.
- Audit criteria are now automatically pre-loaded.
- Support for Mac, iPad, Android tablets as well as Windows environments.
- Decrease (hundreds year-over-year) in support calls.
- Overwhelming love from the auditors for: eliminating software installations, scrapping cumbersome USB data syncs between auditors, and for being able to use AccrediRate on any tablet or laptop!
- There were significant cost and time savings for Accreditation Canada staff who no longer had to ship software (or Windows laptops for auditors who used Mac).

one challenge we ran into...

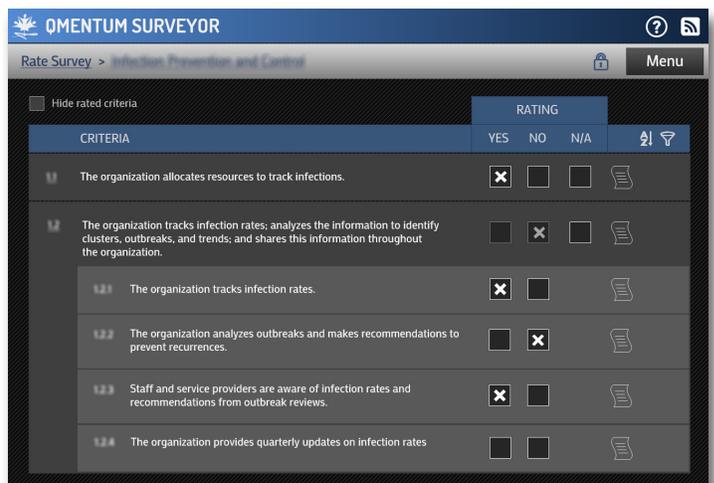
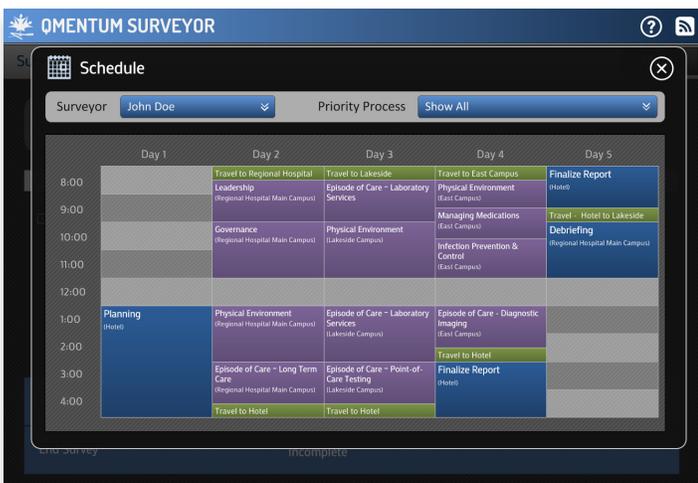
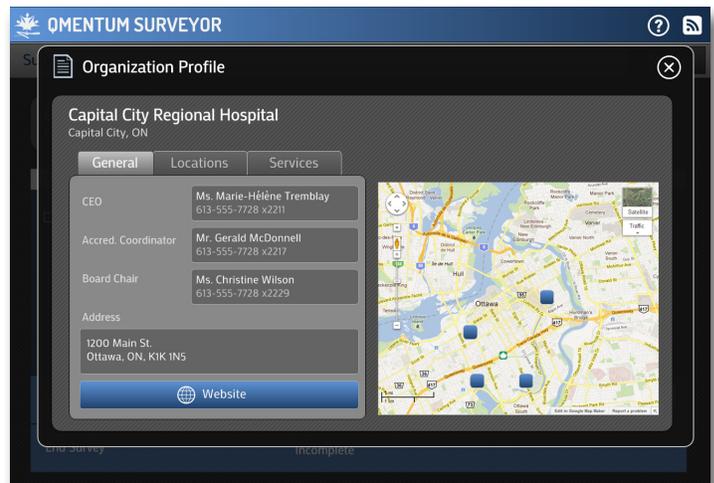
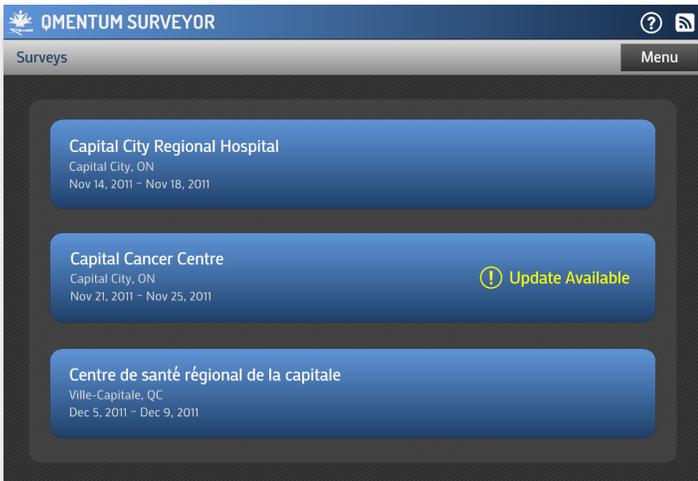
In early stages of the project, management and the auditor corps wanted a tabled-based solution - preferably a native app. However, the evidence collected during our extensive user research suggested a web app would be a far better solution.

We also learned that the auditors didn't really perceive the difference between a web app and a native app. As long as they could use their tablets to perform their work, they would be happy.

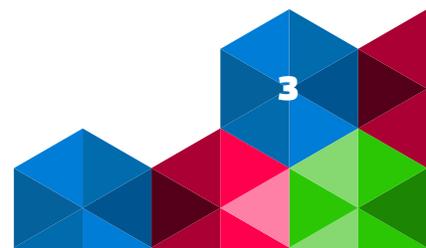
The research evidence helped win over management. However, to get the broader auditor corps on board, we knew we'd have to go beyond the fraction of users who we had engaged with in planning and design phases.

Prior to the rollout, we took advantage of a weekend-long convention for Accreditation Canada auditors to give a keynote "sneak preview" of the tool. We also set up kiosks where the auditors could actually test drive the tool during breaks.

With this, we managed to expose the tool to over 80% of our user base prior to rollout. It generated a lot of excitement, but the feedback from the engagement also allowed us to feel more confident the new tool would be well-received in the upcoming rollout.



ABOVE: Early concepts of AccrediRate (then called "Qmentum Surveyor") that were used as discussion points in focus groups, and user interviews.





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