



Audits for [pro]gress™

May. 2014 - Jul. 2016

scenario

Healthcare providers across Canada perform quality audits against Accreditation Canada's standards in order to self-measure compliance, and ultimately, improve the delivery of care. Most use labour-intensive processes to conduct these audits and typically follow these steps:

1. Download Accreditation Canada's standards (PDF)
2. Copy and paste applicable standards criteria into Excel audit templates
3. Assign audits to department heads across the organization
4. Department heads complete the audits
5. Department heads return audit data for aggregation
6. Reports are generated in Excel or other in-house database

Adding to this problem is the fact that most standards are updated on annual basis, forcing providers to repeat the tedious process of building audit templates annually.

project details

My role: Design Lead
Deliverable: Web application
Devices: Desktop, tablet

design activities

Concept Design

Task Analysis

Stakeholder workshops

Prototyping

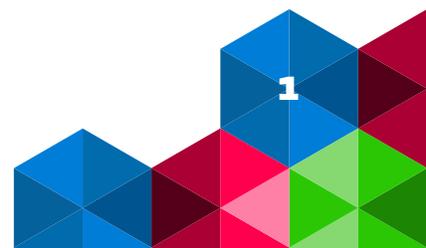
Interaction Design

UI Design

Storytelling

Visual Design

Usability Reviews



action

This project was a significant undertaking for Accreditation Canada as it was a very unique and ambitious product, and its first project following a formal end-to-end user-focused design process. These were some of the key steps we followed:

- We conducted workshops with key health stakeholders such as administrators, quality and risk specialists, regional health executives to help us understand and define the problems we needed to solve.
- After gathering information on needs and pain points using existing tools, we then had several iterations of prototype development, consultations, and revisions with our users and stakeholders.
- We used storytelling techniques to make pitches to executives and board members to secure funding and a commitment to developing the tool.
- Functional prototypes were then developed and we increased our user testing base. We had clients from many different sectors and locations across Canada and the Netherlands test the tool over several months of development. We would discuss feedback with all users and iterate prototype designs accordingly.

one challenge we ran into...

By far, the biggest challenge we faced was winning support and backing for our project. Even though we had research-backed evidence of its potential, many of our peers and leaders were divided on it.

After a few months of debating, we were fortunate to be given time to pitch our idea to our board of directors at an upcoming board meeting. They would either “green light” the project or kill it.

But we weren't sales people - as evidenced by our failure to win sufficient support for our project up to that point. We would seriously have to up our game to gain the Board's support.

The Board itself was comprised primarily of healthcare administrators. I also had recently attended a workshop on storytelling techniques as methods of communication. So our elevator pitch would adopt a movie-like story arc to tell a realistic tale of a healthcare executive's crisis, depicting how our software would help them. Then we repeatedly refined and tested our pitch.

On presentation day, our 30 minutes with the Board was cut to 10, but we were ready. We delivered a concise and effective pitch (in 8 minutes) and - crucially - won the backing we needed. The project was a go!

case studies

Audits for [pro]gress™

matt simpson
experience design

result

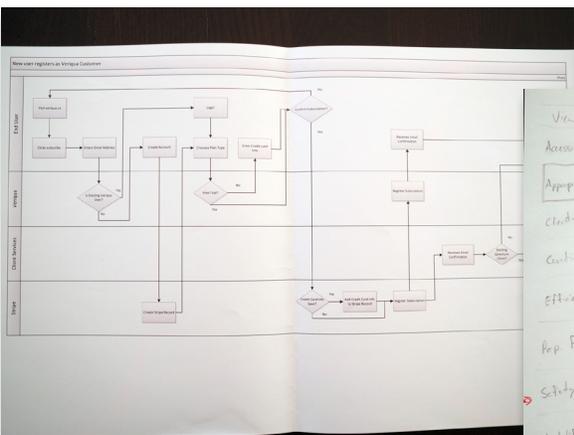
Audits for [pro]gress rolled out to customers in October, 2016.

It pulls standards straight from Accreditation Canada's database, so clients always have the most current version at their disposal. Providers can easily search and select which criteria they wish to audit against, create custom audit templates, rate criteria, and generate reports right inside the tool, or export their data to other formats for custom manipulation.

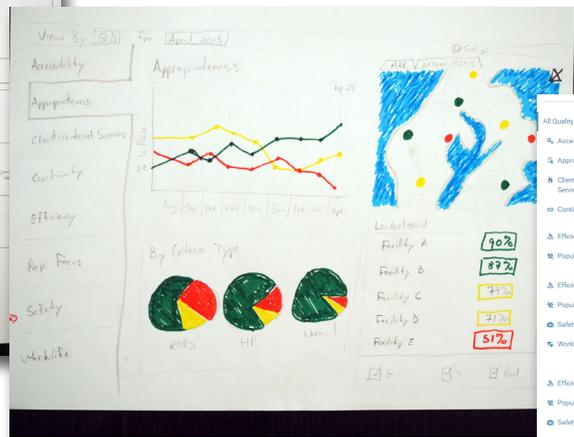
Providers saved enormous amounts of time by easily being able to build and deploy quality audits using Audits for [pro]gress.

Providers are also pleased at quickly being able to conduct data analysis through the data exporting feature and online reports available right inside Audits for [pro]gress.

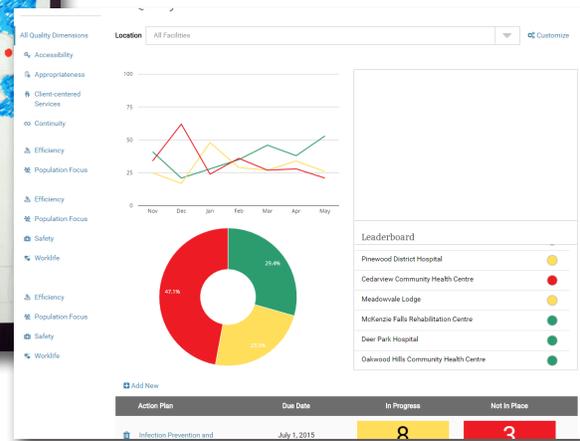
artifacts



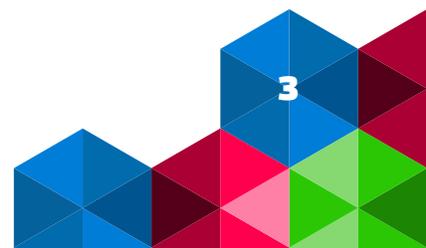
Customer Subscription Process Flow



Early Dashboard Sketch



Functional Prototype of our dashboard

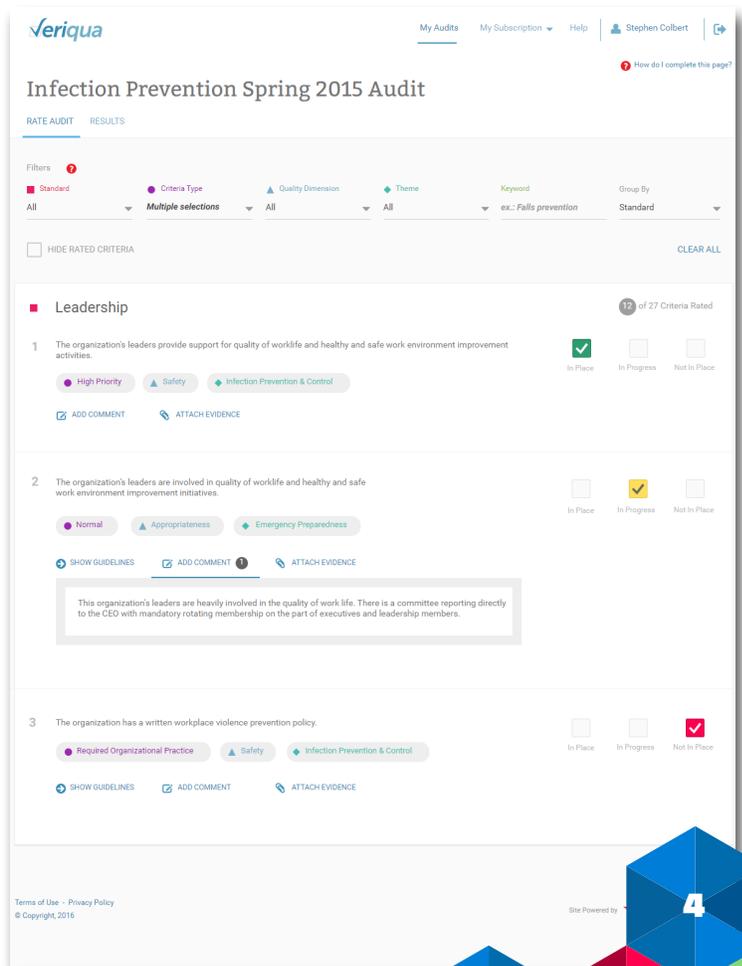
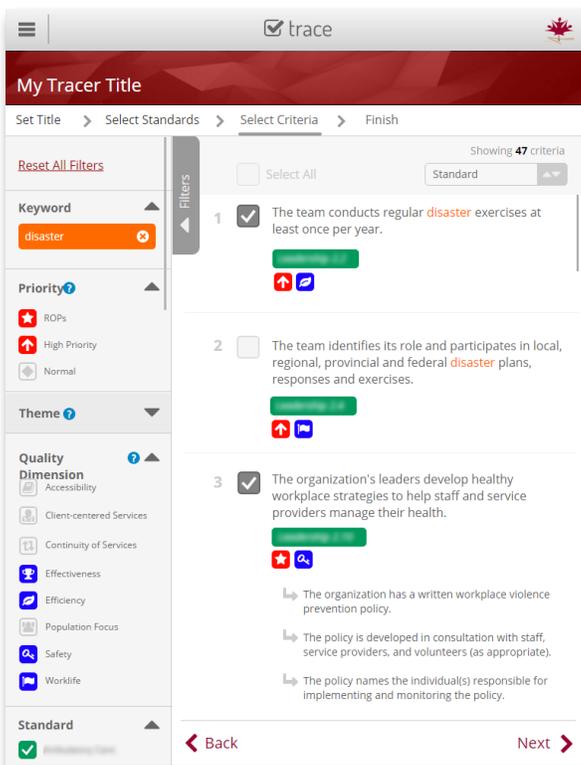
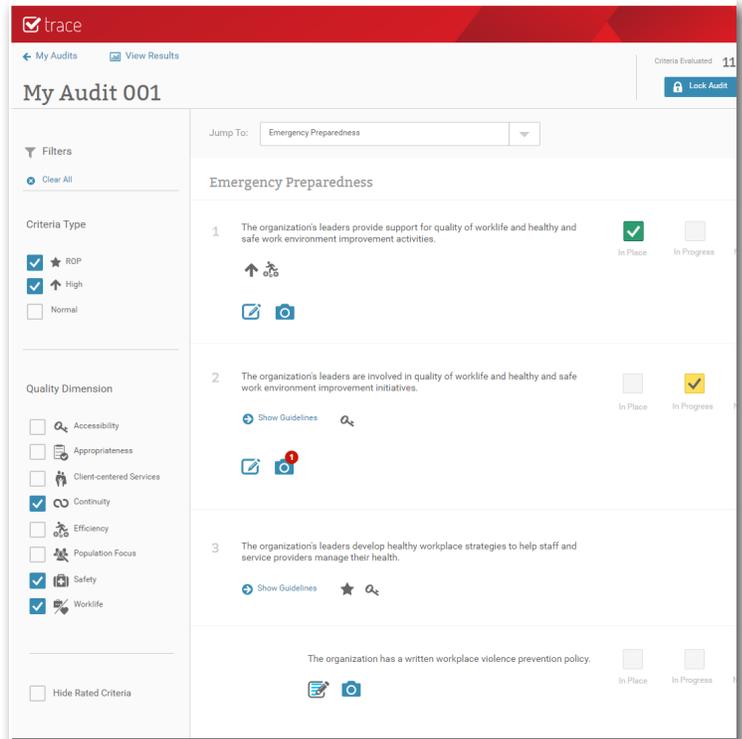


case studies

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Iterations of the audit tool's rating screen including early sketches and iterations of mock ups conducted between 2014 and 2015.





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empower people.**

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