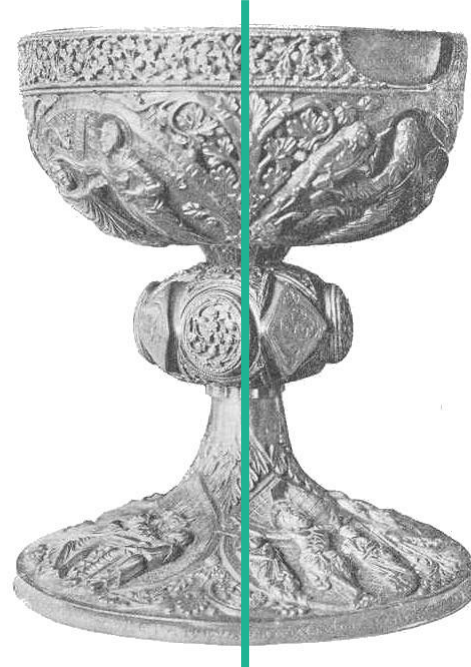# WHAT IS THE HOLY GRAIL OF TECHNICAL DOCUMENTATION?

- "Good" documentation
- "That's the Holy Grail!"
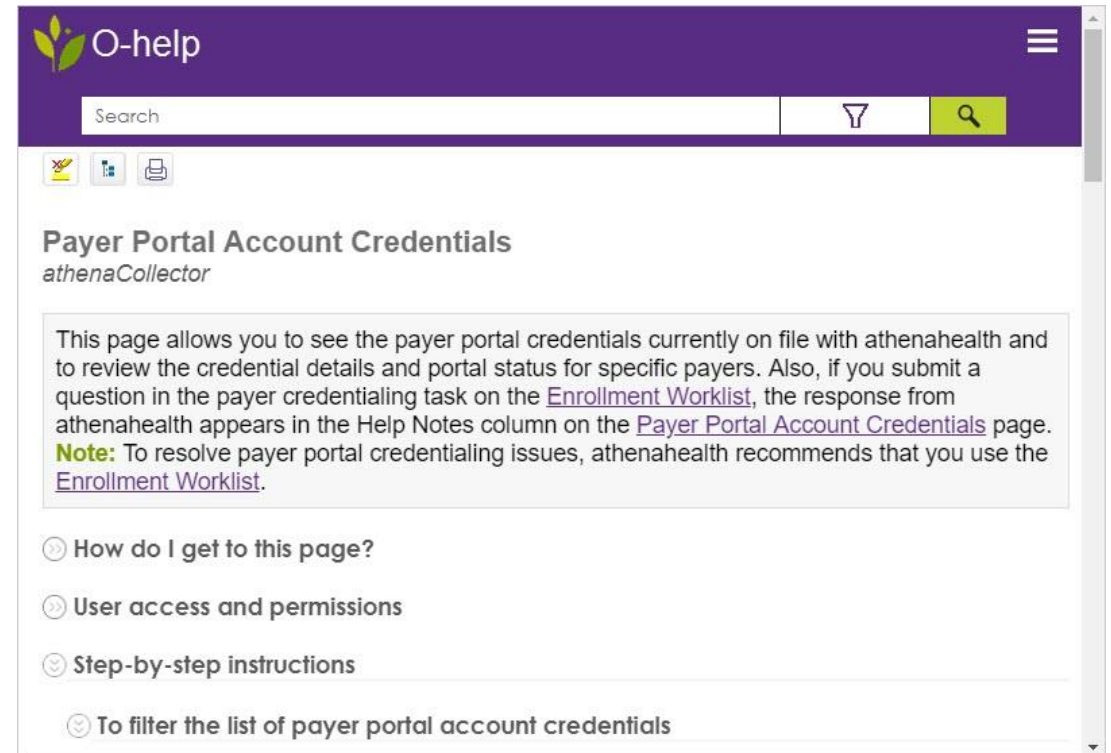- The two halves

case deflection   feature adoption

ATHENAHEALTH HELP BY THE NUMBERS

- 8,000 client sites
- 300,000 users
- 1 version
- 2,220 help topics
- Publish in codebase
- 3 help authors
- 14 tech writers total

WHY YOU SHOULD SEEK THE GRAIL

- Find opportunities to improve documentation
- Define good documentation objectively
- Prove your documentation's value
- Team recognition
- Team staffing
- Boost your career
- Show your team's value (ROI)
  Why?

THE CHANGING LANDSCAPE OF BUSINESS

- Tighter budgets
- ROI is now a necessity
- All teams are accountable for ROI
- Holy Grail can show your ROI
- You all should be in search of it

THE PATH TO PART 1 OF THE HOLY GRAIL

At a high level, you'll need to do the following:

1. Measure readership.
2. Gather support call/case volume data.
3. Continue to measure.
4. Show trends with anonymous data.
5. Show correlation with user-level data.
6. Show causation.

NAVIGATING THE PATH

To be successful, you'll need to be:

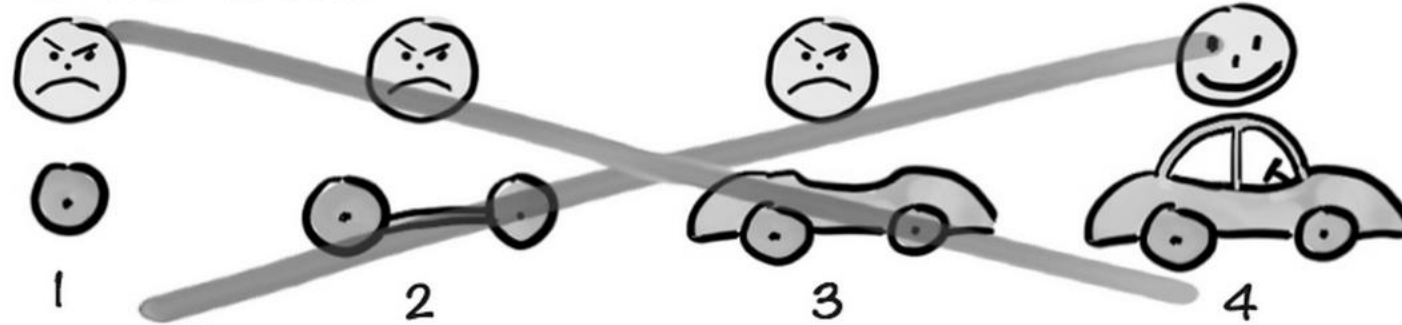- Open-minded
- Tenacious
- Gregarious

GRAILS VARY

Variables include:

- Size of organization
- Types of products
- Tools available and budget
- Staff available
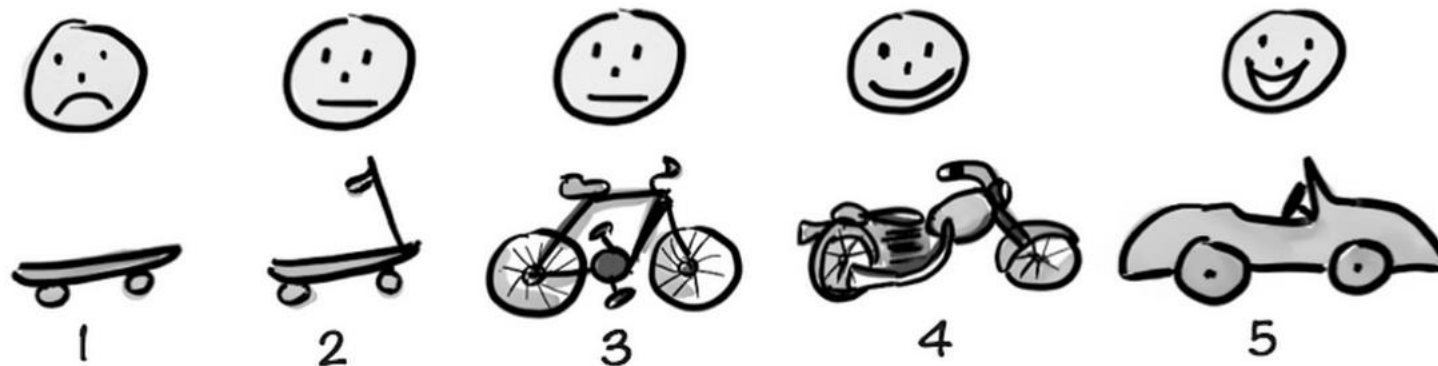- Relationships with Support, IT, and Analytics

DIFFERENT LEVELS OF THE GRAIL

Not like this....

Like this!

by Henrik Kniberg

DIFFERENT LEVELS OF THE GRAIL

Skateboard: Anonymous data showing case volume before and after edits to **one topic**

Scooter: Anonymous data showing case volume before and after edits for **many topics**

Bicycle: **User-level** data **comparing case volume to readership** of **one topic**

Motorcycle: User-level data comparing case volume to readership for **many topics over time**

Sports car: **Automated** user-level data comparison of case volume to readership for **all** topics over time (w/ control group?)

HOW TO BUILD YOUR SKATEBOARD

Anonymous data showing case volume before and after edits to **one topic**

1. Ask Support for **one** key case type/"call driver."

2. Gather call/case data for **one month**.

3. Identify **one** associated help topic.

4. Make edits to help topic, advertise topic, or both.

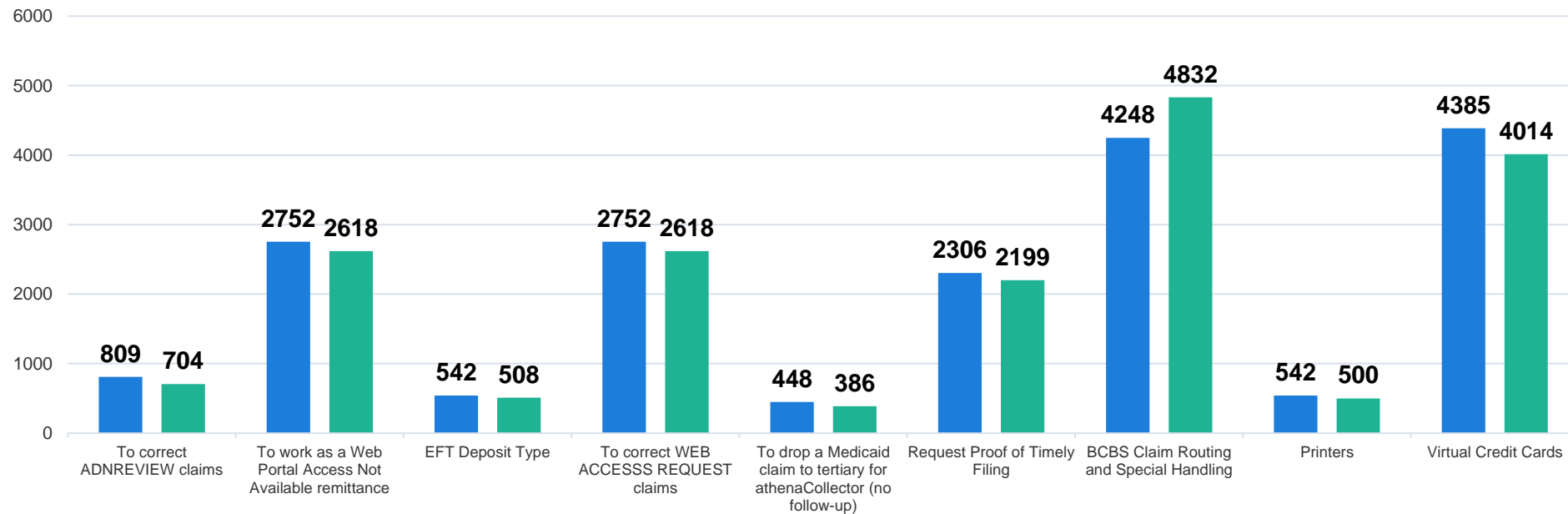5. Track call/case data over next month.

2752

2618

2800

2750

2700

2650

2600

2550

**Payer Portal
Account Credentials**
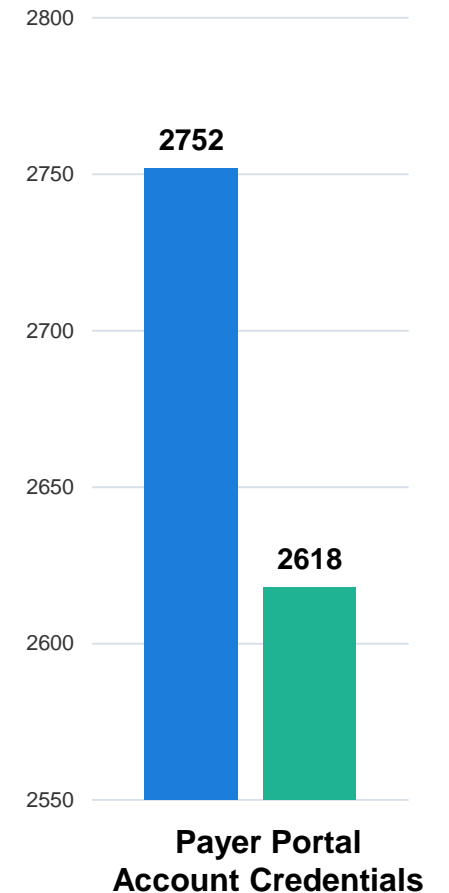
HOW TO BUILD YOUR SCOOTER

Anonymous data showing trends for **many topics**

Same as skateboard, except for many topics.

HOW TO BUILD YOUR BICYCLE

Comparing case volume to **readership of one topic**

1. Implement tool to track **user-level** views of help.

2. Ask Support for **one** key case type/"call driver."

3. Gather **user-level** call/case data for one month.

4. Identify **one** associated help topic.

5. Track readership data of all users who read help topic over same one-month period.

6. Analyze correlations between readers and callers.

HOW TO BUILD YOUR BICYCLE: EXAMPLE

Comparing case volume to readership of one topic

5-High_PayersiteIssues

Opened Case	Read Help		Grand Total
	False	True	
False		166	166
True	11,277	290	11,567
Grand Total	11,277	456	11,733

HOW TO BUILD YOUR MOTORCYCLE

User-level data comparing case volume to readership for **many topics over time**

Same as bicycle, except for many topics over several months.

1. Identify **multiple** help topics.

2. Gather user-level call/case data over **regular intervals.**

HOW TO BUILD YOUR MOTORCYCLE: EXAMPLE

User-level data comparing case volume to readership for **many topics over time**

Deflection Data

Case Type	Reportability	Sep-18	Oct-18	Nov-18	Dec-18	Monthly Average
Claim Appeals	5	95%	92%	75%	81%	86%
Payersite Issues	5	66%	76%	80%	62%	71%
Proof of Timely Filing	4	90%	77%	84%	82%	84%
Virtual Credit Cards	4	59%	66%	65%	62%	63%
Void Charge Corrections	4	97%	99%	99%	85%	95%
BCBS Routing	3	96%	100%	76%	100%	93%
Interest Payment Posting	3	100%	91%	100%	100%	98%
ADNPatient Claims	2	86%	95%	100%	82%	91%
ADNReview Claims	2	100%	87%	100%	100%	97%
Total Average		88%	87%	87%	84%	86%

HOW TO BUILD YOUR SPORTS CAR

Automated user-level comparison of case volume to readership for **all** topics over time (w/ control group?)
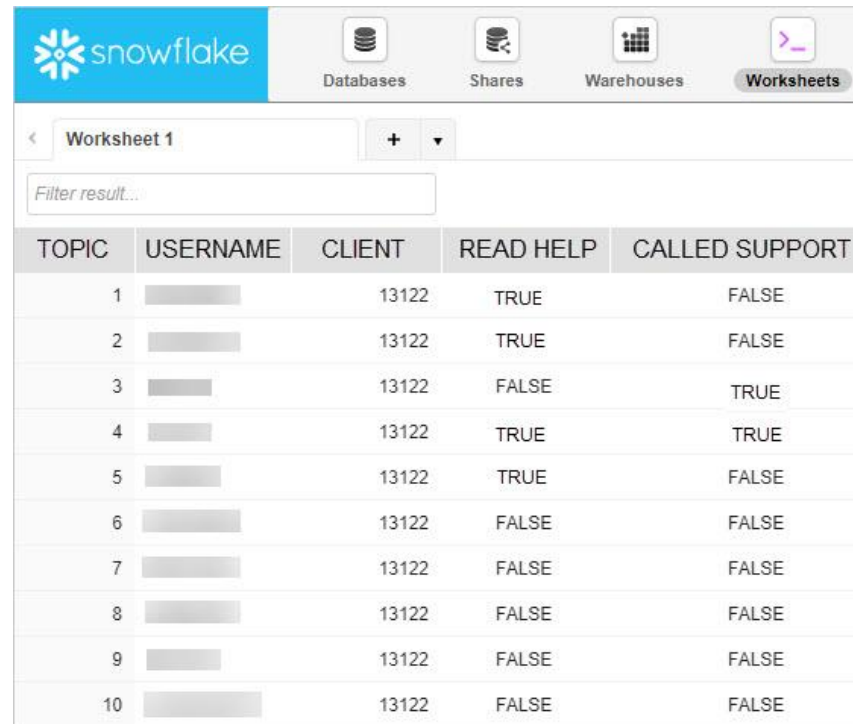*Same as motorcycle, except automated and for all topics.*

1. Find all case types that correlate with help topics.

2. Program correlating factors into a data feed.

3. Implement tool to **feed data into a dashboard**.

4. Re-analyze correlations between readers and callers at **regular intervals**.
   * If allowed, suppress help from a subset of users **(control group)** to prove causation.

HOW TO BUILD YOUR SPORTS CAR: EXAMPLE

Automated user-level comparison of case volume to readership for **all** topics over time (w/ control group?)

HOW TO ADVERTISE HELP TOPICS

Ways to boost readership:

- Advertise on your community site.

- Link to your help from release documentation.

- Mention help topic in client newsletter.

- Refer to help in training.

TRACKING TOOLS: GOOGLE ANALYTICS

Google Analytics

Pros:

- Free version

- Can see search terms

- Stores data indefinitely

Cons:

- Manual, not automated

- Does not track searches that yielded no result
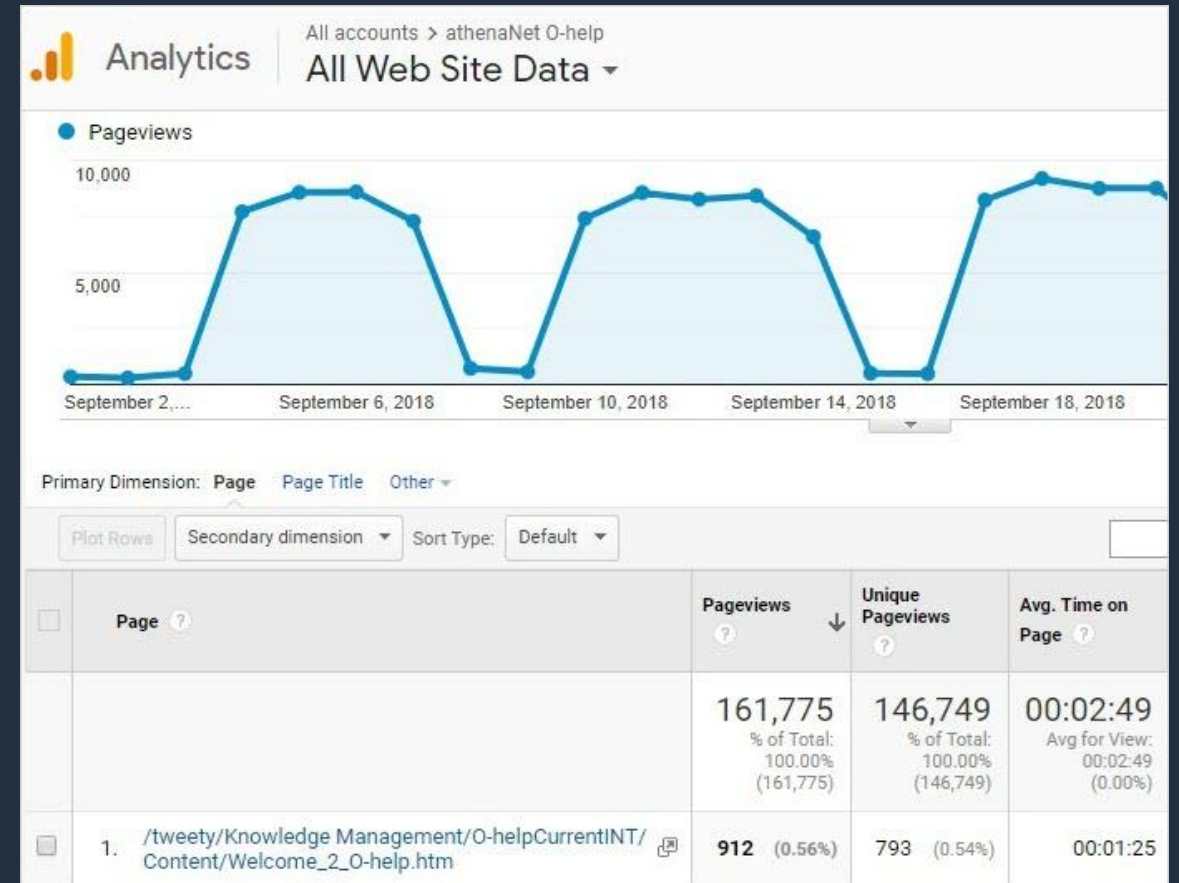
TRACKING TOOLS: MADCAP PULSE

MadCap Pulse

Pros:

- Gather metrics over time or for a date range

- See what keyword searches performed

- Track searches that yielded no result

Cons: ???
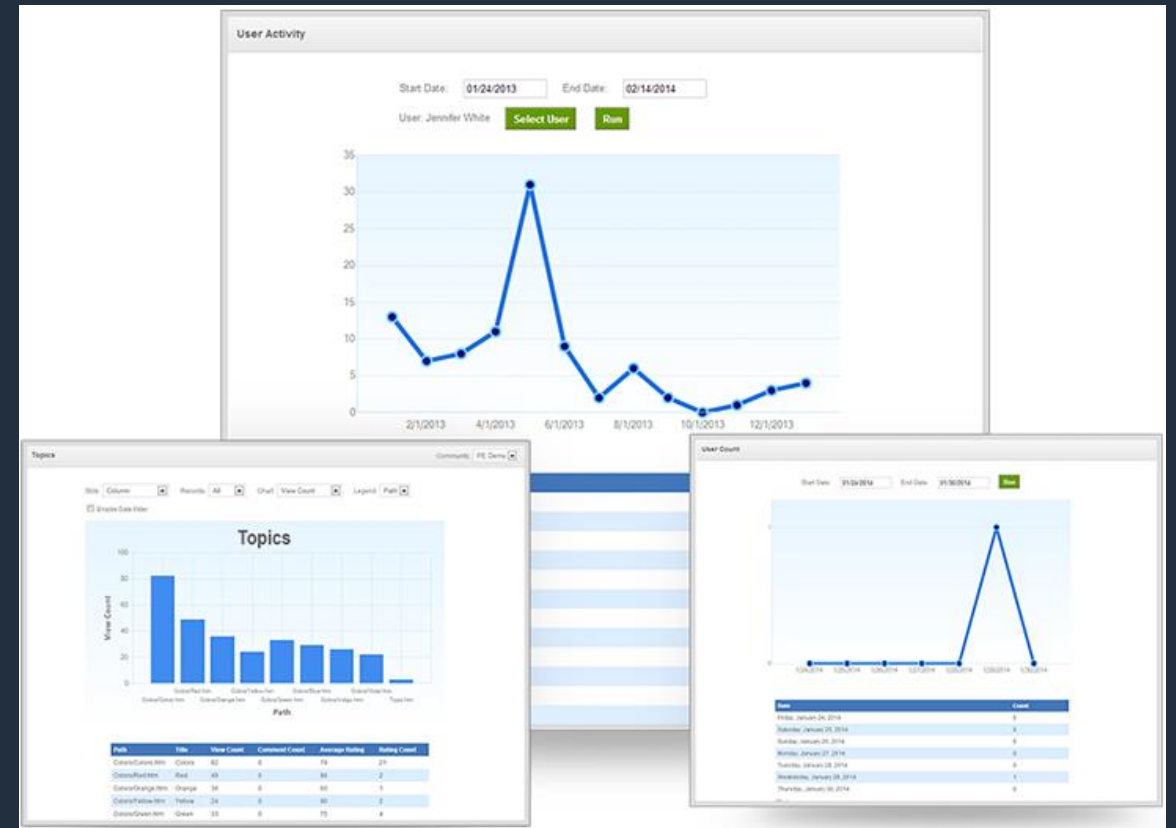
TRACKING TOOLS: ELASTICSEARCH

Elasticsearch

Pros:

- Useful for Flare HTML5

- Individual user data

Cons:

- Performance issues

- Can't store data for long

- Can't measure length of "visit"

ANALYTICS TOOLS: TABLEAU

Tableau

Pros:

- Combines disparate data sources
- Professional visualizations

Cons:

- Expensive
- Steep learning curve
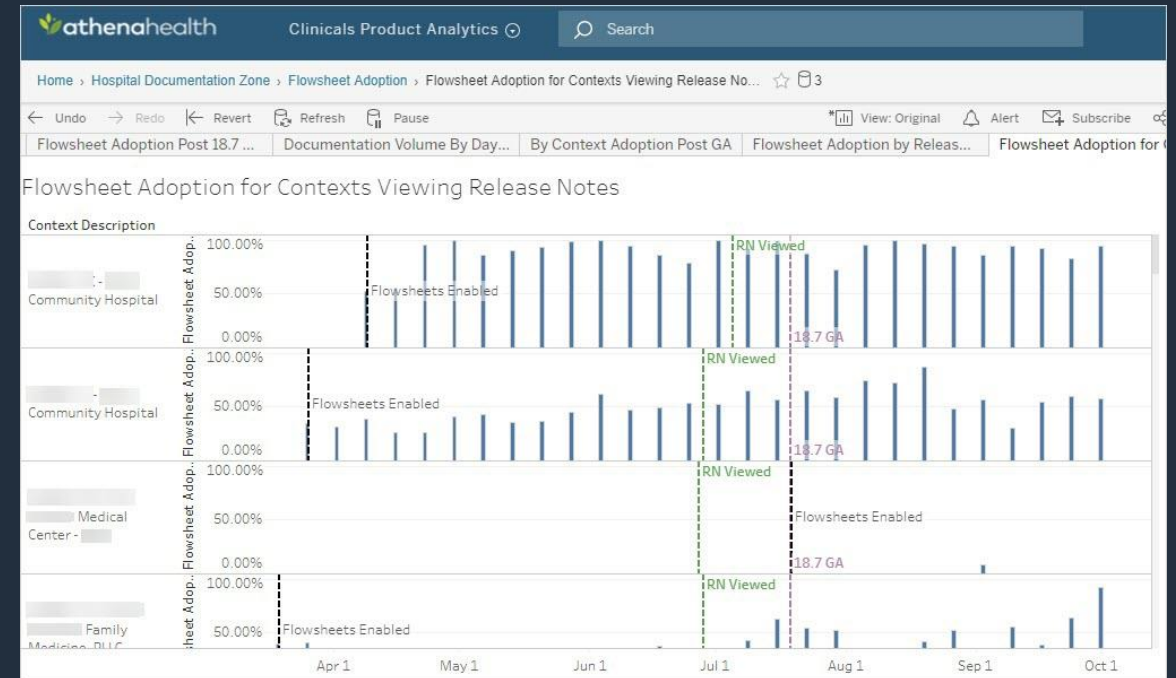
Competitors

- SAP
- Qlik
- Cognos
- Oracle BI

COSTS

- Part-time contractor (?? hrs/wk @ $??/hr) to do:
  - Research on tools
  - Gathering data
  - Crunching numbers

- Tableau Desktop license ($840 for 1-yr license)

- Google Analytics ($0)

- Elasticsearch engine software (from $1,200 to $12,000+ for 1 yr)

- Hardware server to host Elasticsearch (ask your IT department)

- Kibana ($0)

THE HOLY GRAIL AT ATHENAHEALTH

"Shut up and show us already!"

Deflection Data

Case Type	Reportability	Sep-18	Oct-18	Nov-18	Dec-18	Monthly Average
Claim Appeals	5	95%	92%	75%	81%	86%
Payersite Issues	5	66%	76%	80%	62%	71%
Proof of Timely Filing	4	90%	77%	84%	82%	84%
Virtual Credit Cards	4	59%	66%	65%	62%	63%
Void Charge Corrections	4	97%	99%	99%	85%	95%
BCBS Routing	3	96%	100%	76%	100%	93%
Interest Payment Posting	3	100%	91%	100%	100%	98%
ADNPatient Claims	2	86%	95%	100%	82%	91%
ADNReview Claims	2	100%	87%	100%	100%	97%
Total Average		88%	87%	87%	84%	86%

WITH A LITTLE HELP FROM MY FRIENDS

- Online help authors
- Support (Service Performance team)
- Tools experts
- Business Intelligence team
- Analysts

Peggy
Senior Technical Writing Manager
Technical Writing

Gail
Technical Writing Manager
Technical Writing

Taylor
Technical Writer
Technical Writing

Pierpaolo
Principal Member of Technical Staff
Enterprise Business Applications

Michele
Operations Project Associate
Perceptual Quality

David
Senior Revenue Analyst
Perceptual Quality

Louisa
Manager Operations
Perceptual Quality

Fran
Technical Writer
Technical Writing

Daniel
Consultant
Technical Writing

Patty
Operations Project Associate
Perceptual Quality

Jack
Director Product Management
Customer Success Platform & Tools

BACKGROUND

- A lesson in keeping your ear to the ground
- "You scratch my back…"

Estimated Reportability	Case Type	Help Topic Title
5-High	Claim Appeals	athenahealth Claim Appeal on Your Behalf
	Payersite Issues	Payer Portal Account Credentials
		To Correct WEBACCESSREQUEST Claims
		To Work a Web Portal Access Not Available Remittance
4-Moderate-High	Proof of Timely Filing	Request Proof of Timely Filing
	Virtual Credit Cards	Virtual Credit Cards
	Void Charge Corrections	Void Charge and Corrected Claim Workflow
3-Moderate	BCBS Routing	BCBS Claim Routing and Special Handling
	Check Deposit	Check Deposit Type
	Interest Payment Posting	Interest Payment Posting

EXAMPLE OF A MODIFICATION

To view the structure of a family

1. Display the Patient Registration page: On the Main Menu, click Patients. Under PATIENT REGISTRATION, click New Patient Registration.

2. Scroll down and locate the Family Members (share the same guarantor) heading on the lower right side of the page.

3. Click show family structure. The **Show Family Structure** window opens, showing a tree-like diagram of the family structure.

To view patients with credit balances

This function can be used to generate a list of patients who have unapplied credit or prepayment balances. You can use this worklist to identify patients with unapplied credit and/or prepayment balances that should be applied to outstanding charges.

Note: You must have the Credit Balance Worklist permission to generate the worklist.

1. Display the Billing Worklists page: On the Main Menu, click Claims. Under CLAIM MANAGEMENT click Billing Worklists.

2. At the top of the page, in the **View Patients with Credit Balances** section, use the menus and fields provided to generate a worklist with the desired contents.

ATHENAHEALTH'S SKATEBOARD

Aggregate cases 60 days before and after modifications
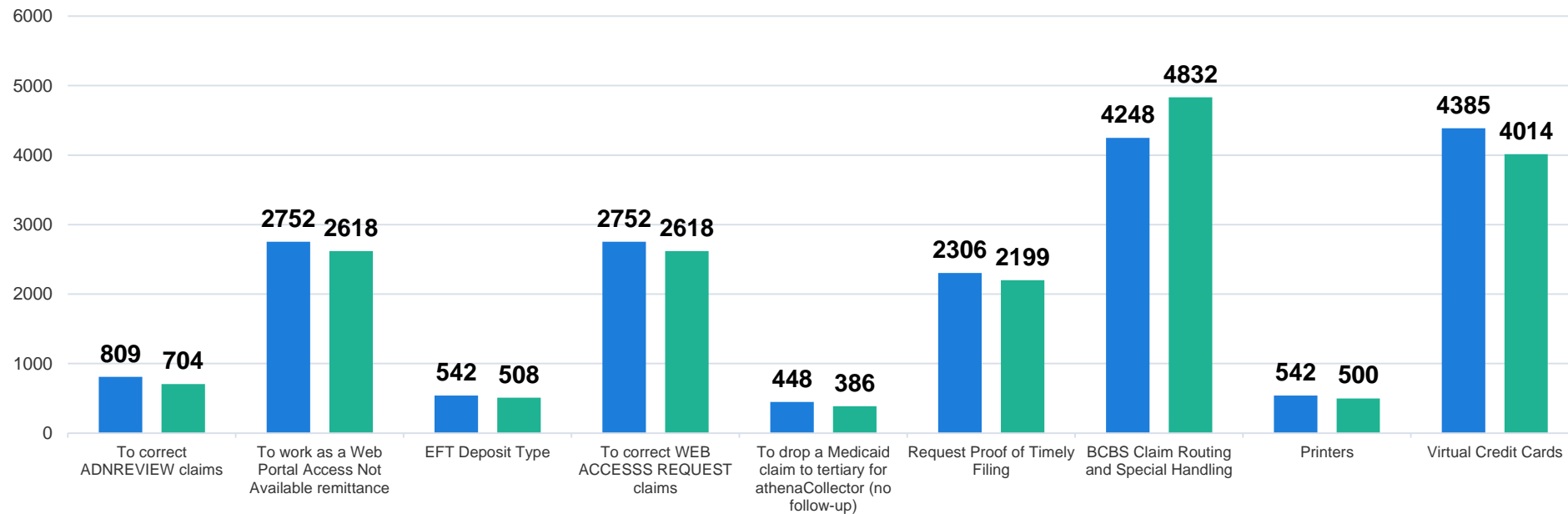
ATHENAHEALTH'S SCOOTER

- Showing trends
- Monthly aggregate views before and after modifications
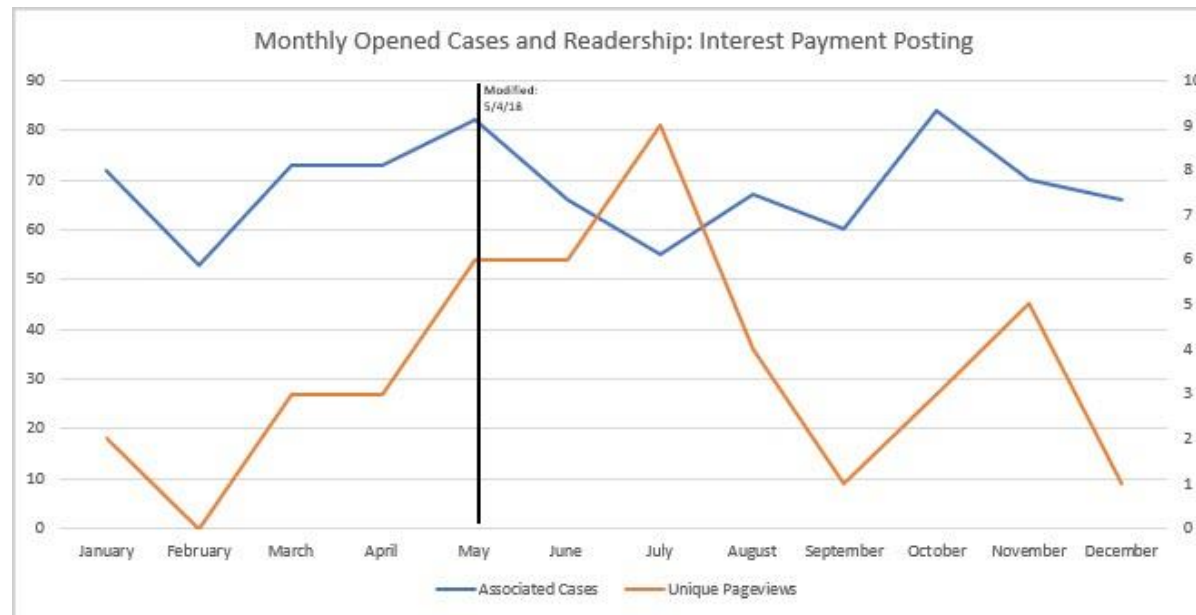
Cases

Pageviews

Italian cooking

$$H: \text{ read Help} \begin{cases} \text{yes} \\ \text{no} \end{cases}$$

$$C: \text{ Open Case} \begin{cases} \text{yes} \\ \text{no} \end{cases}$$

		H		
C		n	y	
n			166	166
y	11277		290	11562
	11277		456	11733

$$P\left(C=y \mid H=y\right) = \frac{P(C=y \wedge H=y)}{P(H=y)} = \frac{290}{456} = 64\%$$

C   H

ATHENAHEALTH'S BICYCLE

166 didn't open case/456 readers = 36%

5-High_PayersiteIssues

Opened Case	Read Help		Grand Total
	False	True	
False		166	166
True	11,277	290	11,567
Grand Total	11,277	456	11,733

ATHENAHEALTH'S MOTORCYCLE

Replicating and averaging over time

Deflection Data

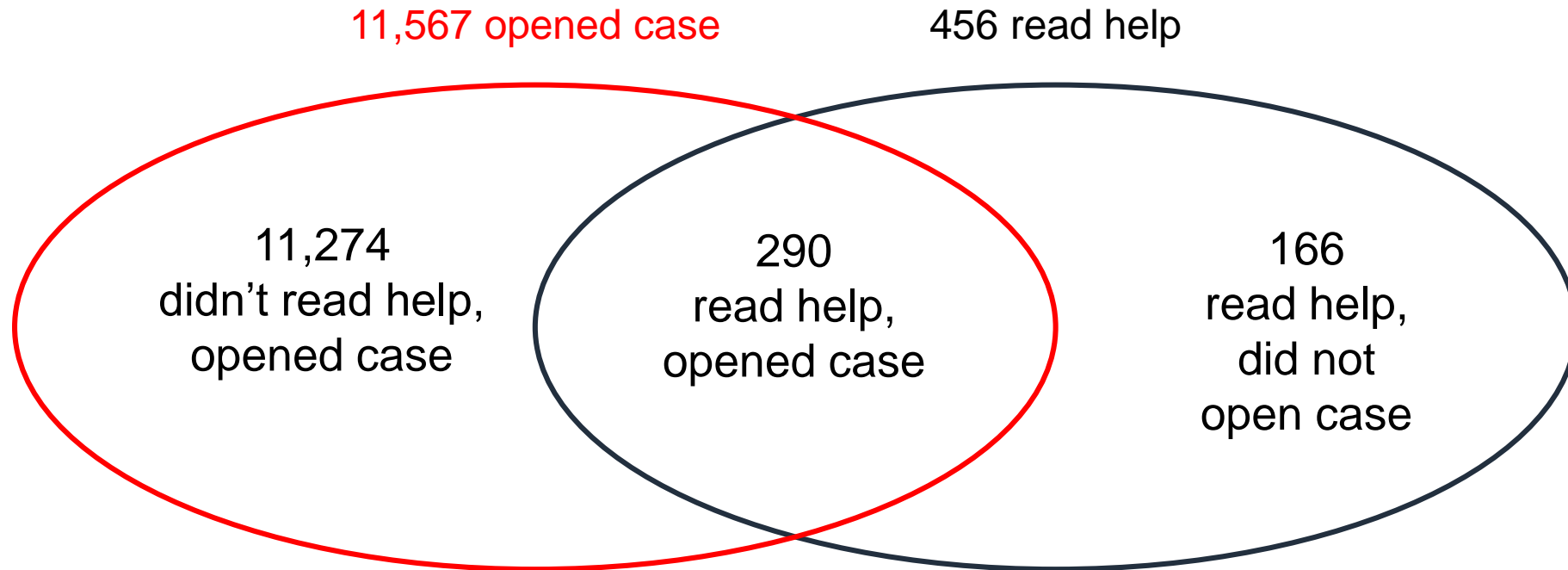| Case Type	Reportability	Sep-18	Oct-18	Nov-18	Dec-18	Monthly Average
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Total Average		88%	87%	87%	84%	86%

ATHENAHEALTH'S ALTERNATIVE MOTORCYCLE

- Looking at timestamps
- Did users create a case after they read the help?
- Lower % is better

Opened Case After Reading

Case Type	Reportability	Sep-18	Oct-18	Nov-18	Dec-18	Monthly Average
Claim Appeals	5	5%	8%	11%	7%	8%
Payersite Issues	5	17%	12%	9%	19%	14%
Proof of Timely Filing	4	4%	10%	13%	13%	10%
Virtual Credit Cards	4	24%	15%	20%	26%	21%
Void Charge Corrections	4	0%	1%	1%	11%	3%
BCBS Routing	3	4%	0%	16%	0%	5%
Interest Payment Posting	3	0%	9%	0%	0%	2%
ADNPatient Claims	2	14%	0%	0%	10%	6%
ADNReview Claims	2	0%	7%	0%	0%	2%
Total Average		8%	7%	8%	10%	8%

ATHENAHEALTH'S SELF-DRIVING SPORTS CAR

Innovation meets automation

- Data tracked automatically

- Automated analytics
  (totals, averages, percentages, deflections)

- Data fed to dashboard

WHY YOU SHOULD SEEK THE GRAIL

- Find opportunities to improve documentation
- Define good documentation objectively
- Prove your documentation's value
- Team recognition
- Team staffing
- Boost your career
- Show your team's value (ROI)

WHAT IS YOUR TEAM'S ROI?

My team's ROI:

- Potentially deflecting 86% of cases

- Estimated $?? per call

- Average 7,077 unique client pageviews daily

X 260 working days in a year = 1,840,020 views per year

X .86 = 1,582,417 potential deflections

X $?? = $??,???,??? annual savings

A QUICK SALES PITCH

Tomorrow
2:50 p.m.

"Increasing Feature Usage with Effective Release Documentation"

A gripping tale of:

- Failure
- Tenacity
- Learning
- Success
- More failure
- More tenacity

Questions?

Thank you!

https://www.linkedin.com/in/anthonyvinciguerra/