

The Holy Grail, Part 2: Increasing Feature Usage with Effective Release Documentation

PRESENTED BY

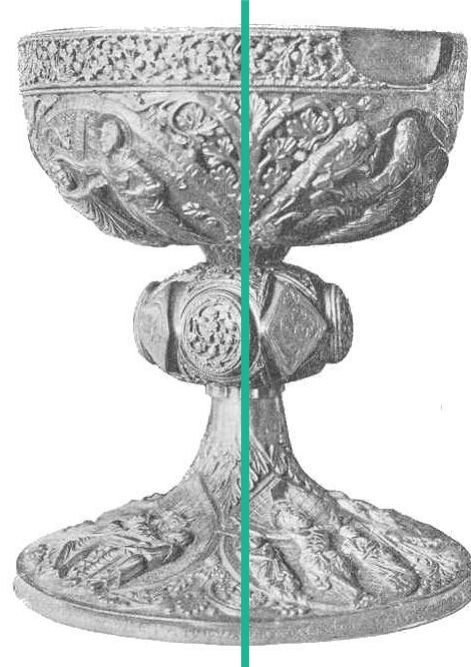
Tony Vinciguerra



WHAT IS THE HOLY GRAIL OF TECHNICAL DOCUMENTATION?

- “Good” documentation
- “That’s the Holy Grail!”
- The two halves

case deflection



feature adoption



A QUICK RECAP OF PART 1

“Driving Down Support Calls with Truly Helpful Online Help”

For those of you that missed it:

- A quick recap
- Recording available after conference

ATHENAHEALTH RELEASES BY THE NUMBERS

- 8,000 client sites
- 300,000 users
- 1 version
- 3 releases per year
- 700 release “notes”/year
- Publish in codebase
- 9 release doc authors
- 14 tech writers total



The screenshot shows the "athenaNet Release Notes" interface. On the left is a sidebar with a "Browse by Task" section containing a list of release notes, with "New: Add Attachments on the Claim Action Page" highlighted. The main content area displays the details for this release note, titled "New: Add Attachments on the Claim Action Page".

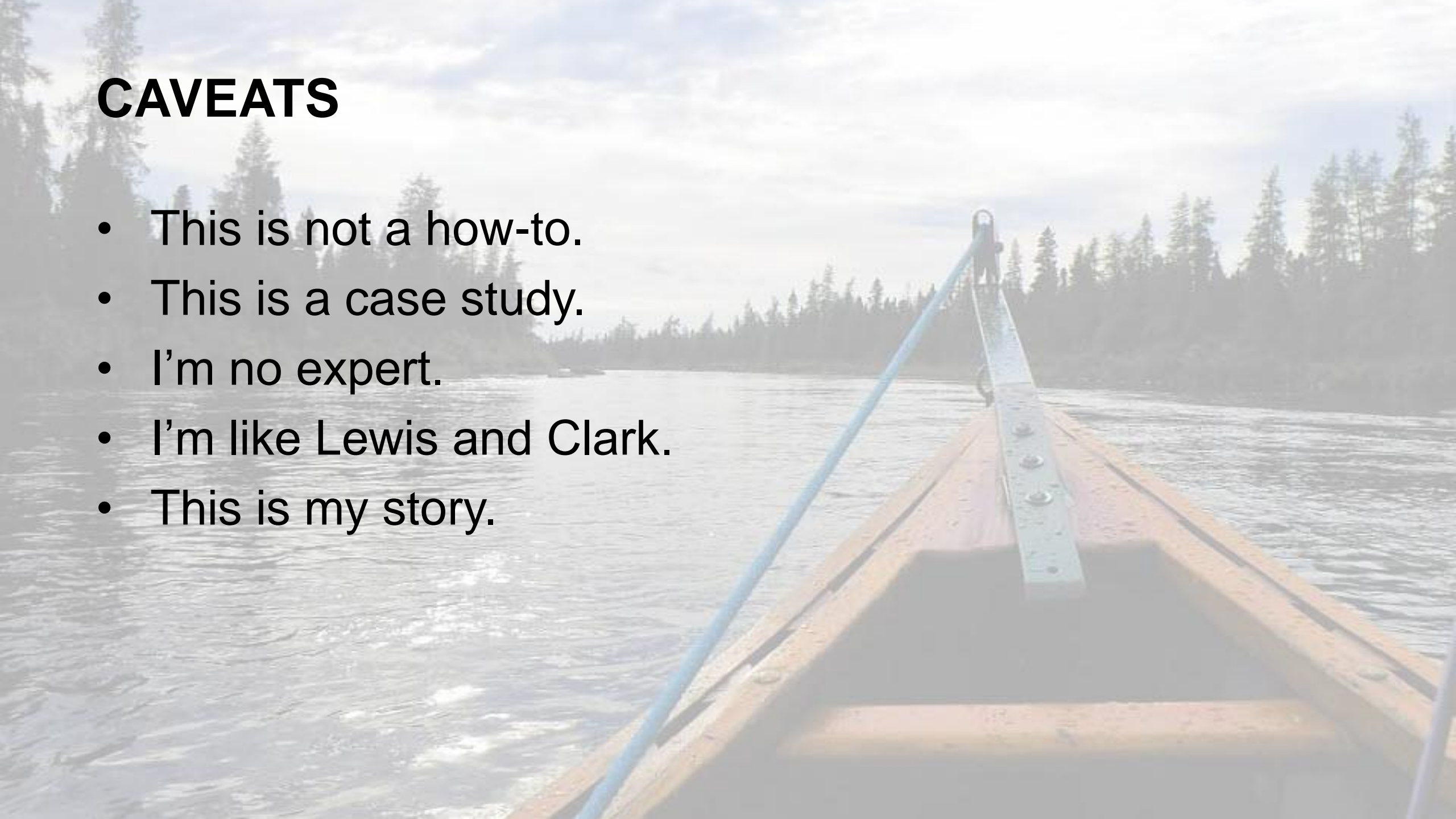
Summary	You can now easily add attachments on the Claim Action page.
Products	athenaCollector
Roles	Management/Technical, Billing, Administrative
Available	March 14-16, 2018
Related information	See Claim Action in O-help.
Highlights	<ul style="list-style-type: none">• Add attachments directly on the Claim Action page• Improved experience when selecting documents to attach to claims

Below the table, a text block states: "You can now easily add attachments on the Claim Action page. Select **Add Attachment** in the menu to upload documents from your desktop or athenaClinicals, and add an optional claim note."

At the bottom, there is a section for "Claim #252" with status tabs: "Primary Hold", "Secondary Closed", and "Patient Closed". To the right of these tabs is a dropdown menu labeled "Add Attachment". The dropdown menu is open, showing options: "Transfer Balance", "Add Attachment" (which is highlighted with a red box and a checkmark), "Update Codes", and "Add Kick Reason".

CAVEATS

- This is not a how-to.
- This is a case study.
- I'm no expert.
- I'm like Lewis and Clark.
- This is my story.



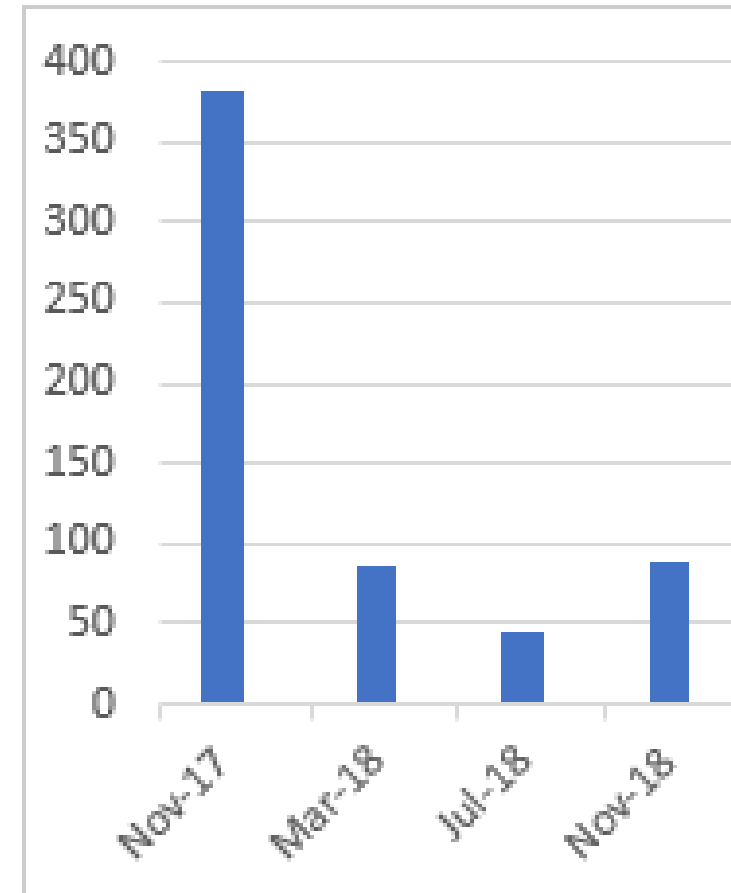


WHY TRY TO TIE READERSHIP TO ADOPTION?

- A lot of interest from leaders and MadWorld attendees
- High value/low risk
- Big potential gains:
 - Money savings
 - Proven value of documentation
 - Team recognition
 - Team staffing
 - Boost my career

RELEASE DOC'S #1 GOAL

- Reduce calls to Support
- Can it help in other ways?
- 2017



Release-Related Support Calls

ADOPTION'S AN OPTION

- What is it?
- For example
- Who defines it?
- Value statements

What users are saying

You can now accurately record the gender identity of your transgender patients and address them correctly in the manner they expect.

Here are the results from beta testing:

95%

Documented information about transgender patients within a month of enablement

99%

Documented information about a transgender patient

100%

Documented gender identity information for some cisgender patients

We love that athena is thinking about this...as a result of your changes, we've really updated our intake paperwork and have gotten great feedback from patients. They're relieved we're asking them questions in a positive way.

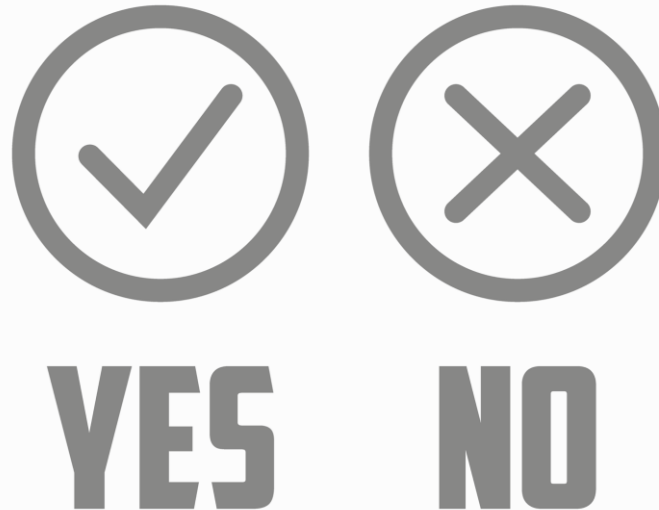
Practice Manager

I really appreciate all the work you have done...it has made my practice much more inclusive.

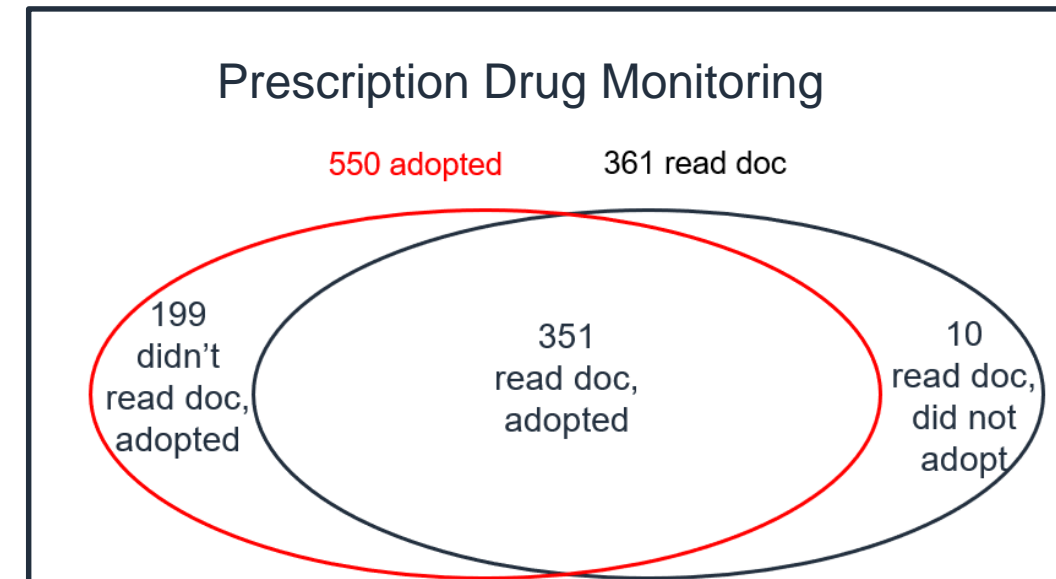
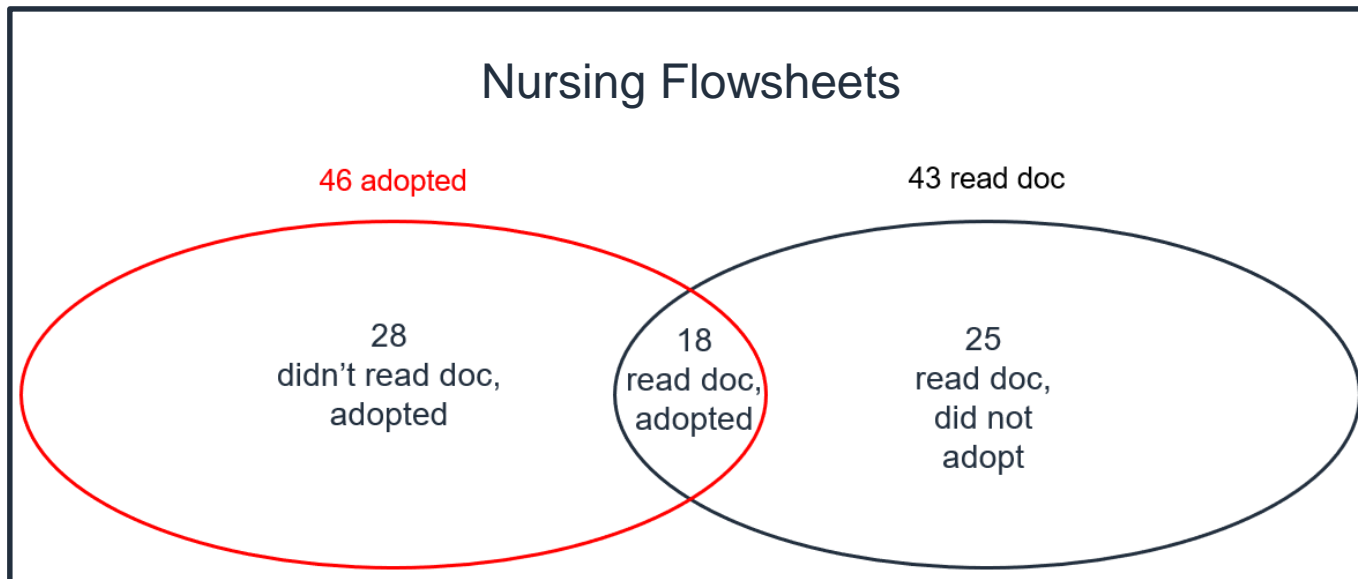
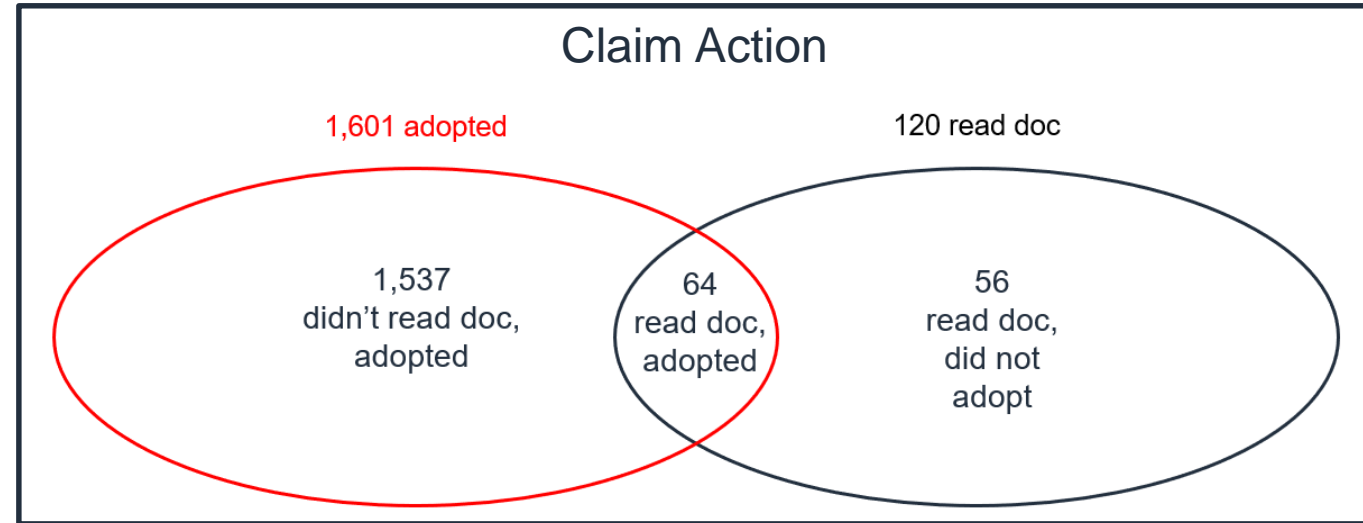
Clinician

THE GOAL

- Answer the question, “Are readers of release documentation more likely to use a feature?”
- Success = Yes or No answer



SPOILER ALERT





MY PATH TO PART 2 OF THE HOLY GRAIL

At a high level, I tried to accomplish the following:

1. Find scrum teams defining and measuring adoption
2. Gather feature adoption data, if feature fits the bill
3. Define target audience
4. Measure readership
5. Show correlation
6. Lather, rinse, repeat, and scale



THE IDEAL FEATURE

- Optional
- Consistent use case
- Generally available
- “Big bang” release
- Large, well-defined target audience (MDs, RNs, billers?)

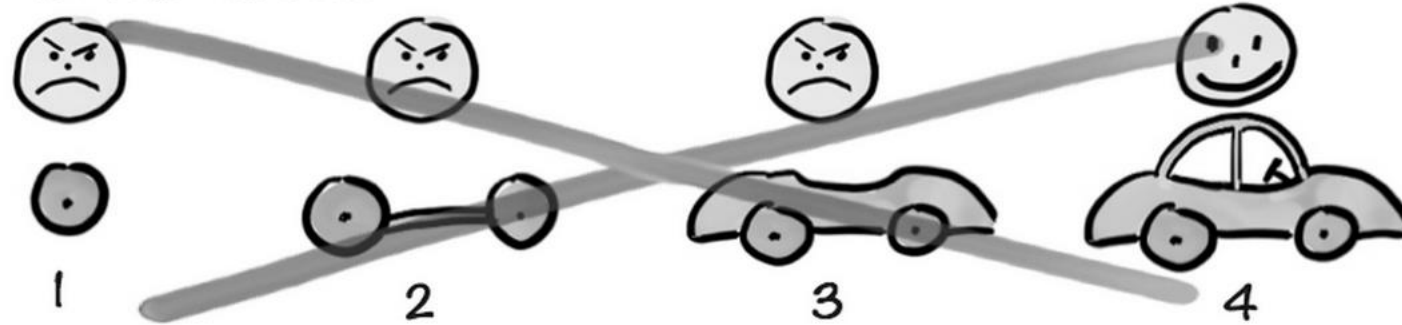


CHALLENGES

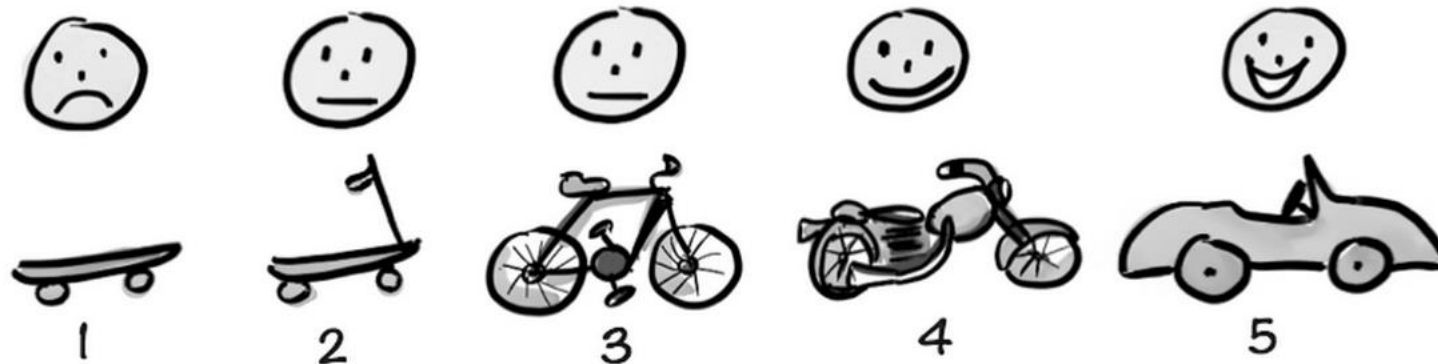
- Few optional features
 - Scrum teams not able to define or measure adoption
 - Scrum teams unable to share adoption data
 - Lack of “clean” readership and adoption data
- “This feature might not be the best use case for your project.”

DIFFERENT LEVELS OF THE GRAIL

Not like this....



Like this!



by Henrik Kniberg

DIFFERENT LEVELS OF THE GRAIL



Skateboard: One feature, at one point in time, manually



Scooter: Multiple features, at one point in time, manually



Bicycle: Many features, at multiple points in time, manually



Motorcycle: One feature, at multiple points in time, automated



Sports car: Many features, at multiple points in time, automated

A LITTLE HELP FROM MY FRIENDS

- Release doc writers
- Analytics managers
- Analysts
- Product Operations
- Business Intelligence team



Pierpaolo

Principal Member of Technical Staff
Enterprise Business Applications



Karthy

Product Operations Senior Associate
Product Operations



Janeen

Technical Writing Manager
Technical Writing



Mike

Product Analytics Associate
Product Management



Vince

Senior Product Analytics Associate
Clinicals Analytics



Daniel

Consultant
Technical Writing



Allison

Technical Writer
Technical Writing



Maureen

Senior Technical Writer
Technical Writing



David

Product Analytics Manager
Collector Analytics



Fran

Technical Writer
Technical Writing

THE TOOLS I USED

Elasticsearch
(Kibana)

Tableau



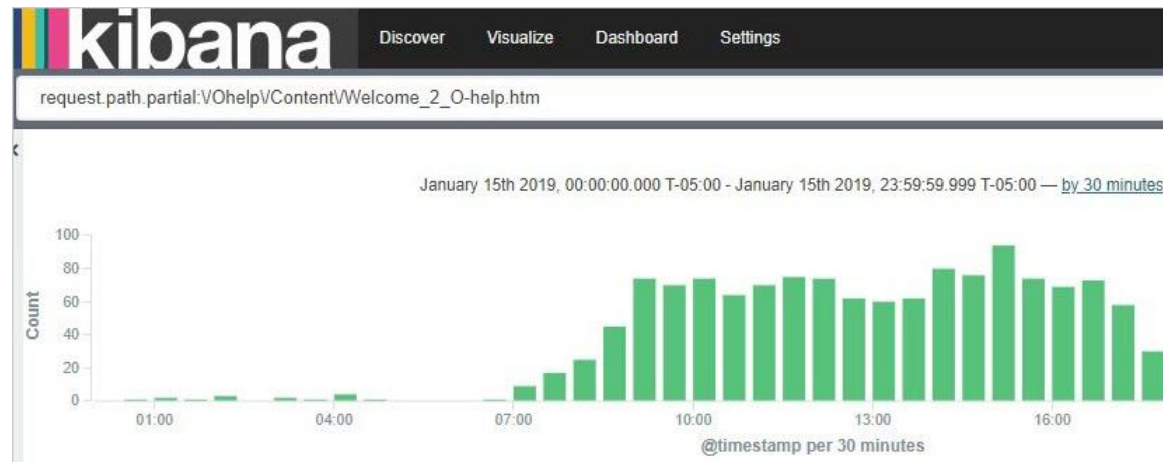
TOOLS: ELASTICSEARCH

Pros:

- Useful for Flare HTML5
- Individual user data

Cons:

- Useless for print
- Can't store data for long
- Can't measure length of “view”



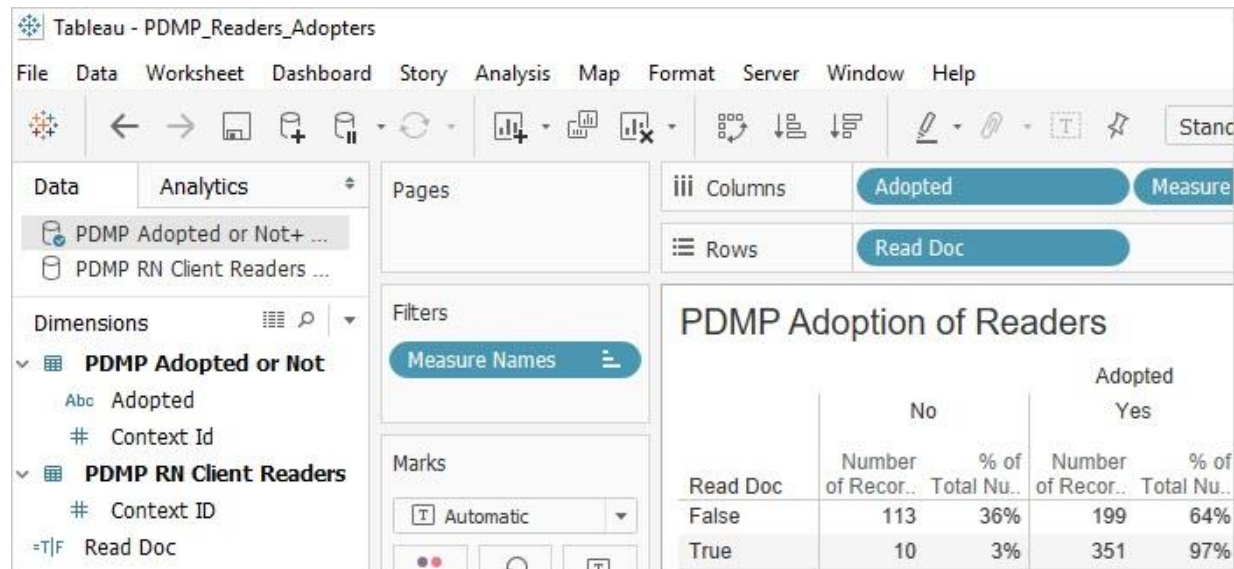
TOOLS: TABLEAU

Pros:

- Combines disparate data sources
- Professional visualizations

Cons:

- Expensive
- Steep learning curve





COSTS

- Part-time contractor (?? hrs/wk @ \$??/hr) to do:
 - Research on tools
 - Gathering data
 - Crunching numbers
- Tableau Desktop license (\$840 for 1-yr license)
- Elasticsearch engine (from \$1,200 to \$12,000+ for 1-yr)
- Server to host Elasticsearch (ask your IT department)
- Kibana (\$0)



LESSONS I LEARNED ALONG THE WAY

- Release trainer model = organizations not users
- Small data sets = harder to show significance
- Lack of “clean” data due to:
 - Unclear target audience/varied org types
 - Different types of releases
 - Varied document delivery methods
 - Not capturing data at the source



THE DATA I CAPTURED

The good, the bad, and the ugly

- Claim Action Add Attachments feature
- Nursing Flowsheets feature
- Prescription Drug Monitoring Program feature (PDMP)

CLAIM ACTION ADD ATTACHMENTS FEATURE

The good

- Dedicated analytics manager
- Defined and measured adoption
- Able to share data

The bad

- Wide range of users, hard to define
- Barriers to adoption

The ugly

- Swiss cheese data



CLAIM ACTION ADD ATTACHMENTS DATA

The good

- 54% of smallest client sites who read doc adopted the feature

The bad

- 27% of all clients who read doc adopted the feature

The ugly

- Raw numbers too low

AMSERVICE.. ContextReadRN		Avg. Attachment Utilization per Cont..
Advanced	False	33.30%
	True	30.42%
Hospital	False	14.41%
	True	8.66%
Premier	False	18.77%
	True	23.69%
Standard	False	47.29%
	True	53.99%
Strategic	False	18.46%
	True	20.65%



NURSING FLOWSHEETS FEATURE

The good

- Dedicated analytics manager
- Defined and measured adoption
- Able to share data

The bad

- Small data set
- Barriers to adoption

The ugly

- Extended beta rollout
- Various doc distribution channels

NURSING FLOWSHEETS DATA

The good

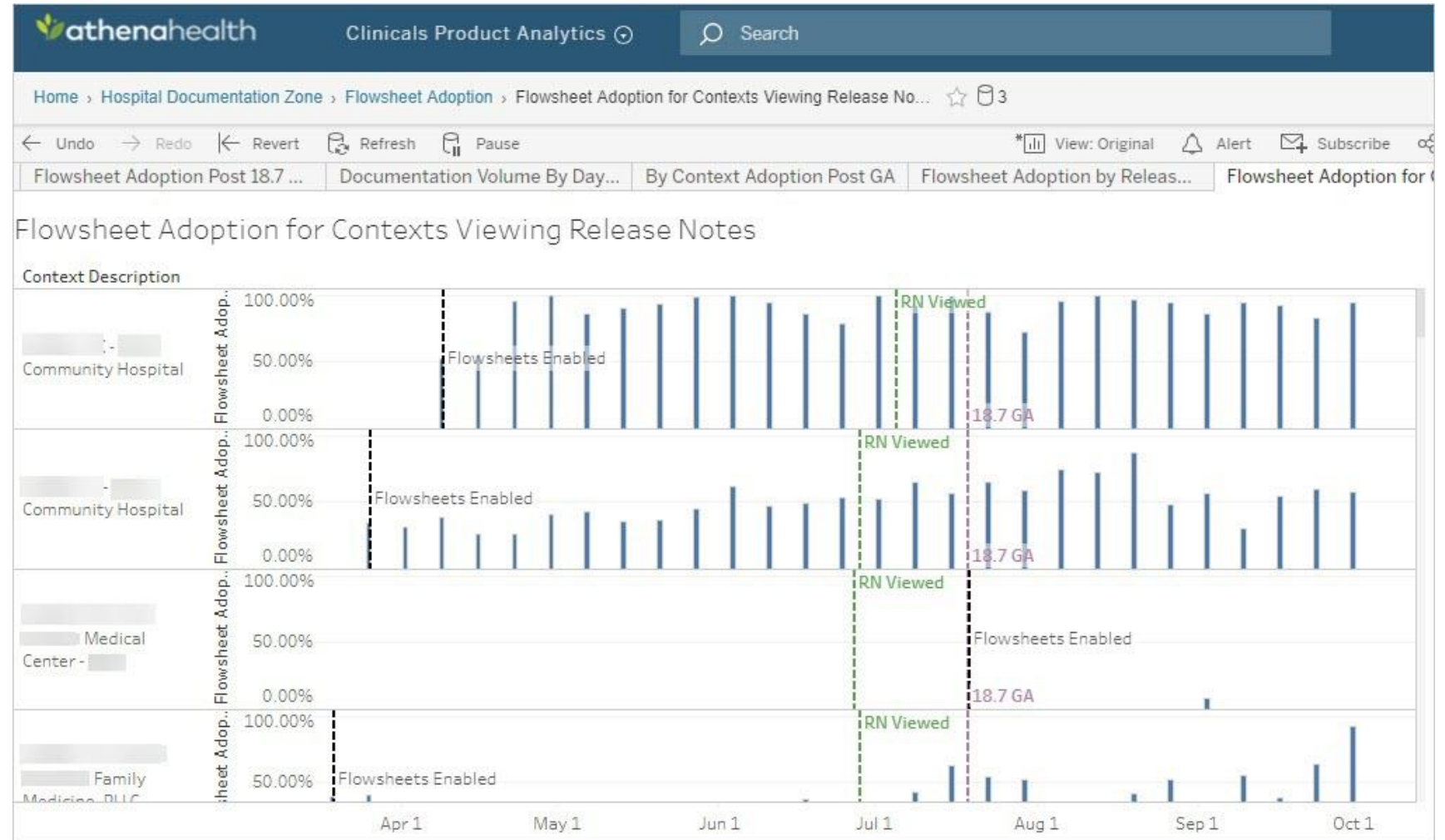
- Accessible data

The bad

- 42% adopted
- 58% did not

The ugly

- Counted those unable to adopt





PRESCRIPTION DRUG MONITORING FEATURE

The good

- Dedicated analytics manager
- Defined and measured adoption

The bad

- Only available in three states

The ugly

- Many practices that don't prescribe controlled substances (pediatrics, allergists) unlikely to use feature



PRESCRIPTION DRUG MONITORING DATA

The good

- Exported data fit my needs

The bad

- Small data set

The ugly

- Unable to share source data



NO ONE SAID THAT THERE WOULD BE MATH

Compared these true/false statements:

- Read the document
- Didn't read the document
- Adopted the feature
- Didn't adopt the feature

Combined to answer these questions:

- Of those that read doc, how many adopted feature?
- Of those that didn't read doc, how many adopted feature?
- Is there a correlation?



EXAMPLE OF DATA CAPTURED: CLAIM ACTION

Captured data for these true/false statements:

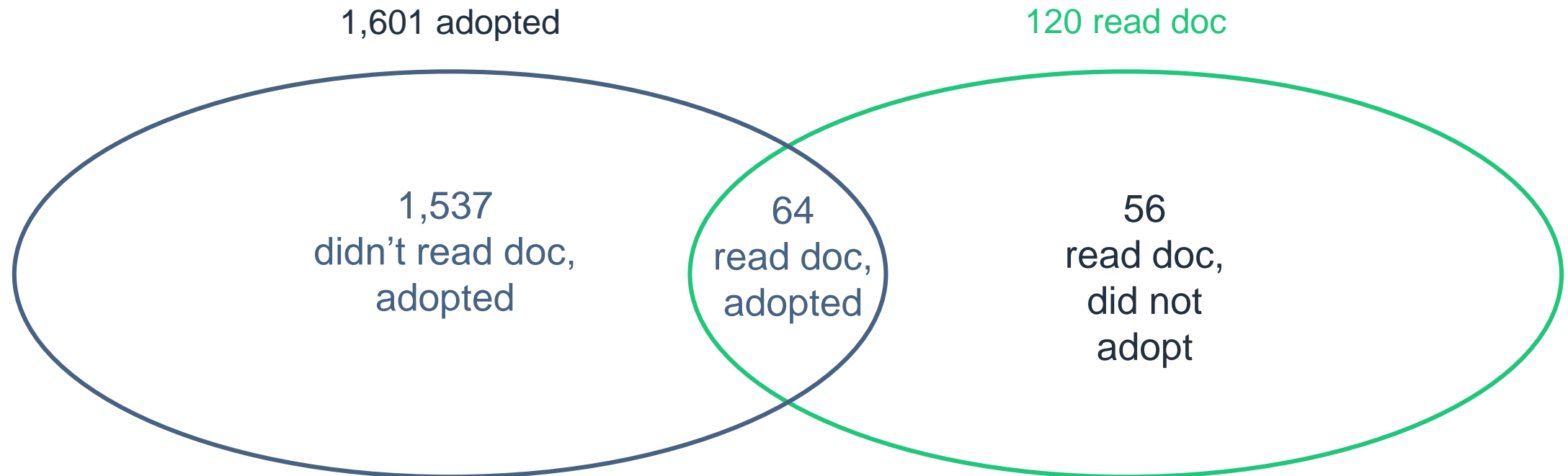
- Read the document: 120
- Didn't read the document: 3,270
- Adopted the feature: 1,601
- Didn't adopt the feature: 1,789

Answered these questions:

- Of those that read doc, how many adopted feature? 64
- Of those that didn't read doc, how many adopted feature? 1,537

EXAMPLE OF MATH: CLAIM ACTION

- Non-reader adopters (1,537) divided by all non-readers (3,270) = 47%
- Reader adopters (64) divided by all readers (120) = 53%
- Is there a correlation? **No.**





EXAMPLE OF DATA CAPTURED: NURSING FLOWSHEETS

Captured data for these true/false statements:

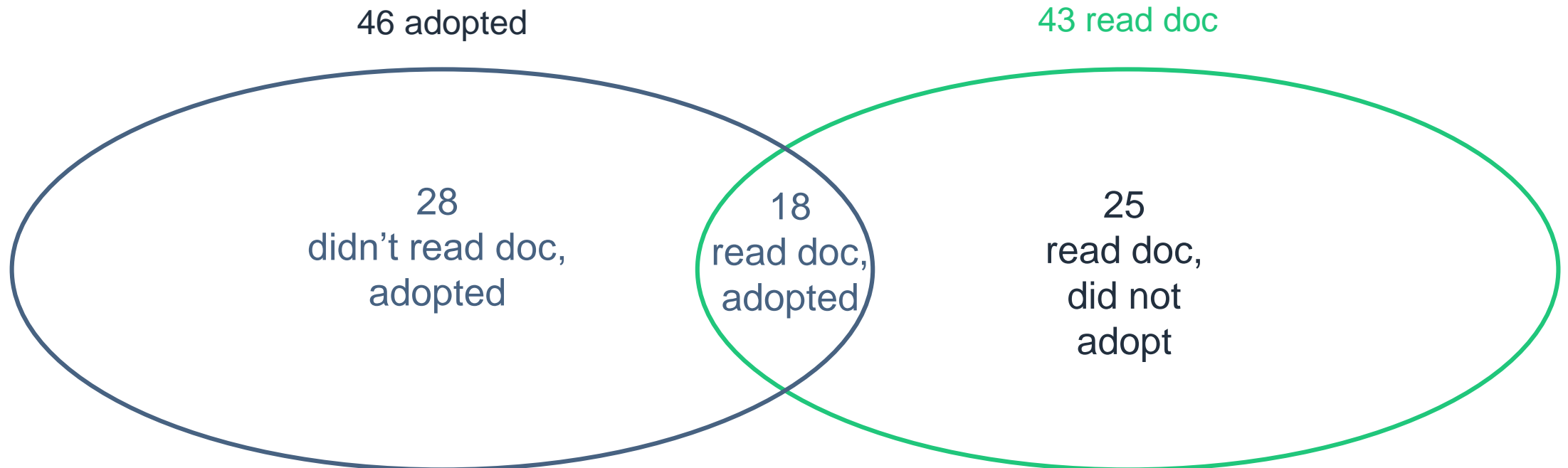
- Read the document: 43
- Didn't read the document: 49
- Adopted the feature: 46
- Didn't adopt the feature: 46

Answered these questions:

- Of those that read doc, how many adopted feature? 18
- Of those that didn't read doc, how many adopted feature? 28

SHOW YOUR MATH: NURSING FLOWSHEETS

- Non-reader adopters (28) divided by all non-readers (49) = 57%
- Reader adopters (18) divided by all readers (43) = 42%
- Is there a correlation? **No.**





EXAMPLE OF DATA CAPTURED: PRESCRIPTION DRUG MONITORING

Captured data for these true/false statements:

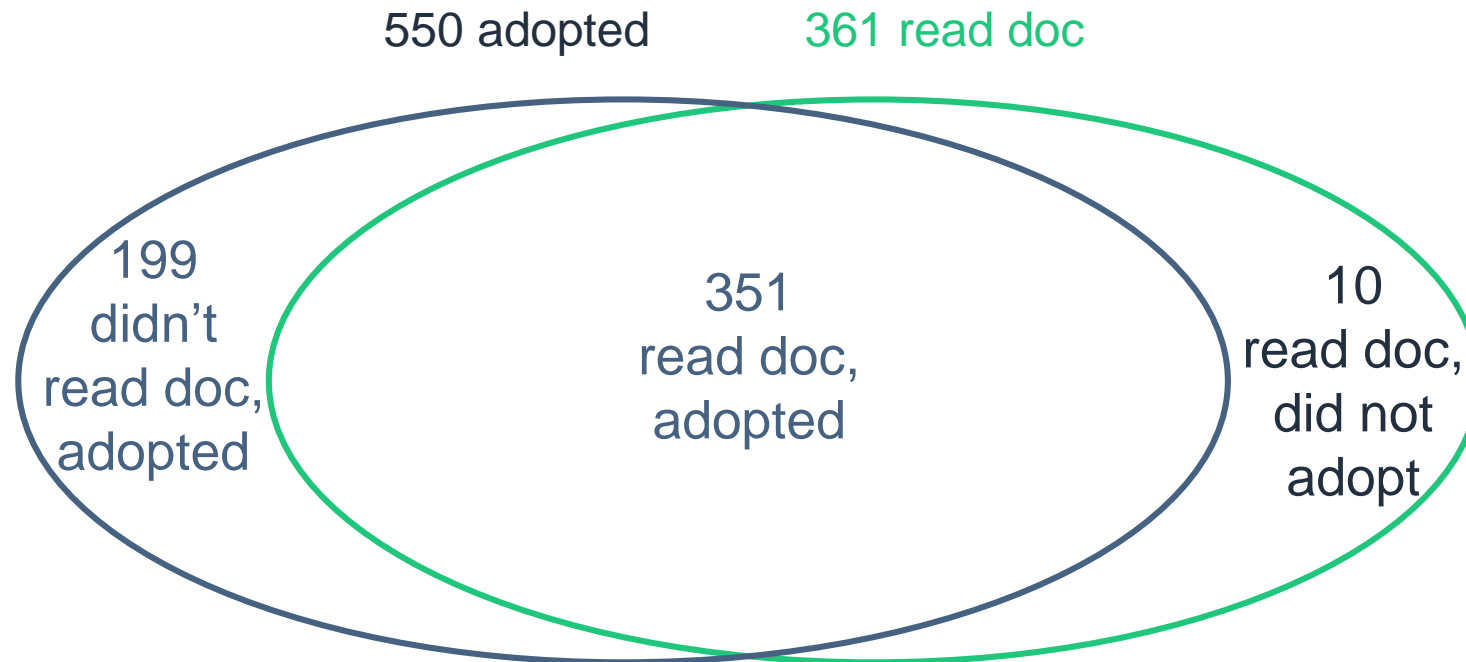
- Read the document: 361
- Didn't read the document: 312
- Adopted the feature: 550
- Didn't adopt the feature: 123

Answered these questions:

- Of those that read doc, how many adopted feature? 351
- Of those that didn't read doc, how many adopted feature? 199

SHOW YOUR MATH: PRESCRIPTION DRUG MONITORING

- Non-reader adopters (199) divided by all non-readers (312) = 64%
- Reader adopters (351) divided by all readers (361) = 97%
- Is there a correlation? Yes.



WHERE I AM TODAY

- Captured some preliminary data
- Quality and quantity of some data is poor
- Promising signs
- Enough evidence to fight on



THE NEW GOAL

Original goal:

“Are readers of release documentation more likely to use a feature?” Yes or No.



New goal:

Build a scooter; then on to a sports car.



“WHAT, ME WORRY?”

- Discouraged?
- Mistakes = learning
- Support from leadership
 - Clearing my calendar



dont
worry
be
Happy



WHAT'S NEXT?

How I'll use what I've learned

- Look for ideal features
- Present a compelling case
- Ask the right questions
- Try to replicate success



IF I WERE KING ARTHUR

- Scrum teams accountable for adoption
- Data sharing is easy
- Data captured at the source to prevent gaps
- Automated data feeds



IN SUMMARY

- Closer to beginning than middle
- Each step is easier
- Part of my job for years to come
- Big potential gains:
 - Money savings
 - Proven value of documentation
 - Team recognition
 - Team staffing
 - Boost my career

Questions?

MW

Thank you!

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

MW