PRESS GANEY®

Integrated Reporting Usability Testing Summary: **Sessions 1 – 4**

Session 1 | 9 Participants

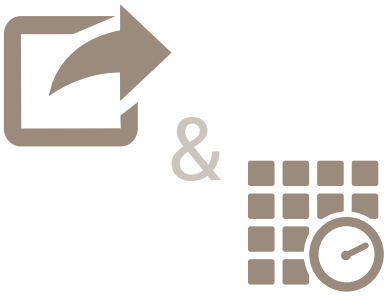
WHAT WE TESTED

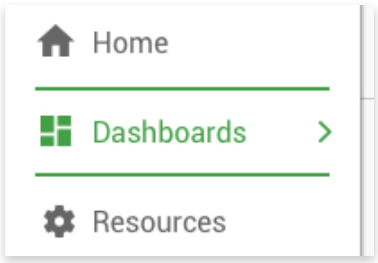
Session 1 served to break the ice with the users and the prototype. Initially each participant was asked to briefly discuss his/her organization's historic use of PG applications such as PGO and IP. This gauged the **'who, what, when, why, and how'** of PG application usage, providing insight in what our clients put value into and what they do not. The emphasis in this session was to paint a picture of how well the user notices and correctly understands some basic functionality of the front page of the prototype. This includes the DataView and application headers, proposed left navigation and right filter functionality, and the level of understanding relative to the primary canvas functions. Moreover substantial focus was put into simply what the user's general first impression of the prototype.

WHAT WE GOT RIGHT

Focus Areas:

- **DataView Headers/Application headers:** The results for this were mixed. Firstly, font size was a constant problem for the users. Labels such as 'My DataView' and Smartboard all gave the user slight confusion as they more or less just wanted to call it the 'Dashboard.' The main functionality of the **Share / Schedule** options was clear but users had trouble figuring out the difference between the two options. The function of the Import option was primarily unclear.



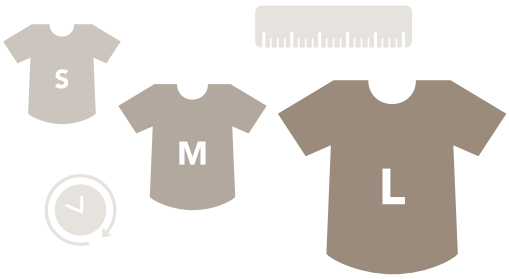


- **Left Navigation:** This was very popular with all users as it gives the prototype a modern feel. Options such as Community and Knowledge all intrigued the users and were curious to see how this will develop overtime. The only component that caused confusion was the Application option and practically every user was confused by this.

- **Right Filter Functionality:** Concept was familiar with all but what wasn't clear was what the complete effects of the filters would be. Most expect entire Dashboard to be prescriptive of them.

WHAT WE GOT RIGHT CONT.

- **Primary Canvas Function:** General impression of this area was strong but users would like more context in regards to timeframe, measure, data-point drill downs, and **'N'sizes**. With the Performance widget, many people pointed out that historic data is not as relevant and long time frames can be distracting. Comments section was popular but users want to be able to break into this more.



Positive Feedback:

"*It's a huge step ahead*. It looks good and will bring a lot of value."

– Kim Sparks, *The John Hopkins Hospital*

"Press Ganey is onto something; *this looks really good*."

– Kevin LaChapelle, *Sharp Health*

WHAT NEEDS FURTHER INVESTIGATION

Areas of Confusion:

- Lack of **axis labels**, **legends**, and overall **context of data** (especially timeframes)
- Function of the **Applications** option
- Differences between the **Share / Schedule** options
- Labels such as **DataViews**, **Smartboards**, etc.
- Vague titling, such as **"Medical Practice"**
- Function of the **Import** option

Negative Feedback:

"*..nothing really new here just laid out differently and looks less dated*; no indication will be more powerful than it has been."

– Peter Lawson, *MetroHealth Medical Center*

WHAT WERE THE PRIMARY TAKE-AWAYS

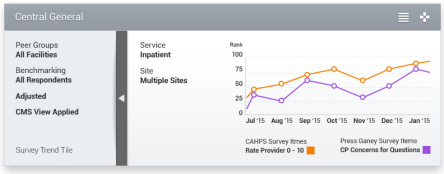
The first session received a good amount of positive feedback as well as constructive criticism. Users like the overall look of the prototype as the widget and left navigation functionality radiate a modern-feel providing a platform that gives a dynamic analysis of their organization. All users are expecting the ability to drill down and use multiple filters allowing the prototype to meet and exceed the capabilities of InfoEdge. The little ambiguities as far as lack of timeframes and axis labels need to be taken out.

Session 2 | 9 Participants

WHAT WE TESTED

Session 2 centered around three main components:

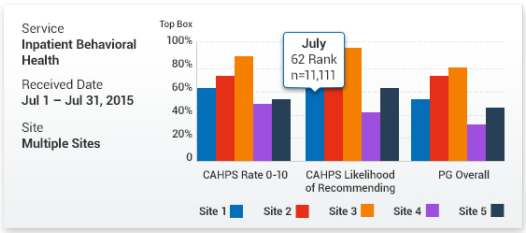
- **Widget Exploration:**
  Data points, layout, and design
- **Smartboard Creation:**
  A quick overview of the widgets created.
- **Widget Editing:**
  Top panel or secondary page widget editing.

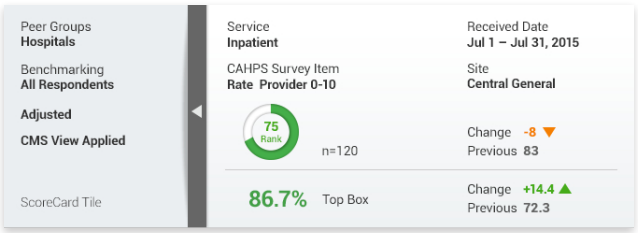


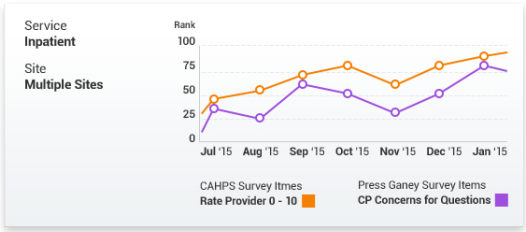
WHAT WE GOT RIGHT

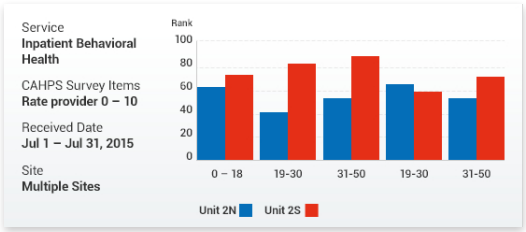
Focus Areas

- **Widget/Dashboard Exploration:** General liking toward configuration of widgets. Almost all users expressed the necessity for these widgets to be flexible enough to display large volumes of units in a non-chaotic manor as well as presenting the proper context of all data.





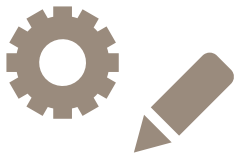




- **Creating a SmartBoard: 72%, Out of the 7 participants, about 5 of them successfully went about creating a Smartboard as intended.** It appears the user was more confused by the hypothetical situation rather than the 'Smartboard-creation' process.

WHAT WE GOT RIGHT CONT.

- Editing a Widget: **~ 100%, Although all participants more or less completed this process**, there was slight confusion on the location and symbolism used to indicate the 'editing' option. Favoring toward the 'cog' or 'pencil/pen' symbol to imply 'editing'. Almost all users favored the 'Top Panel' configuration.



Positive Feedback

"Absolutely in the right direction; *keep going!*"

– Bonnie Jones, *Carolinas Healthcare System*

WHAT NEEDS FURTHER INVESTIGATION

Areas of Confusion:

- Inconsistent use of colors (use of both meaningful and arbitrary coloring), lack of emphasis on timeframe in multiple widgets/visuals, lack of distinction between PG and CAHPS in widgets/visuals, effects of 'Apply' option in Secondary Page wireframe configuration

Negative Feedback:

"*...hoping it will be meatier...* what I want is something that will let me look at things in relation to each other, more unique displays of data, more filters. A little bit shrug worthy; not seeing anything that I couldn't do with a handful of clicks on Excel with my data behind it. Want to see if we can elevate the game and can look at the data in a more sophisticated way than I can do myself."

– Peter Lawson, *MetroHealth Medical Center*

WHAT WERE THE PRIMARY TAKE-AWAYS

Users are pleased with the direction of the widgets/dashboard but any ambiguity in regards to timeframe, measure, coloring, and overall context needs to be eliminated. The user expects vastly deep customization ability within each widget as well. The processes of both creating a SmartBoard and editing a widget all seemed to be pretty intuitive of the user, especially the 'Top Panel' over the 'Secondary Page' wireframe configuration.

WHAT DESIGN CHANGES WERE MADE FOLLOWING PREVIOUS SESSION

Following easier method selections, developed deeper widget building options

Filters/groupings capabilities meet and exceed that of InfoEdge™

Started implementing familiar terms / labels in conjunction with the new interface.

Stronger / more intelligent usage of color

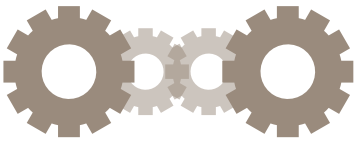
i.e. change colors based on goals (yellow: threshold, green: target, blue: stretch)

Included N sizes throughout the widgets, and in drilldown views

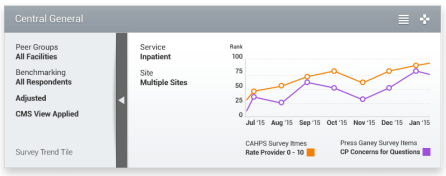
Session 3 | 9 Participants

WHAT WE TESTED

- **Creating** a Widget
- **Editing** a Widget
- **Widget Data Points** Visibility and Access



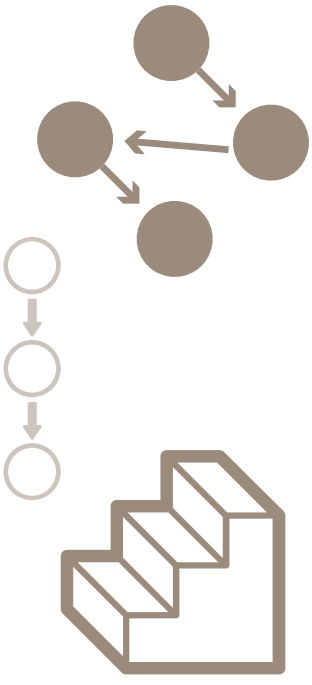
WHAT WE GOT RIGHT



- The process of creating and editing a widget was considered very intuitive overall; **the majority of users correctly noticed/ understood how to create/edit a widget**
- Users liked that they were able to **customize so many widget parameters**
- Users liked that they had **all of their InfoEdge options present**
- Users liked the **ability to trend multiple items**, especially PG and CAHPS, simultaneously
- Users liked the **dynamic and modern interface**
- Users **understood the creating and adding of widgets** to their dashboard

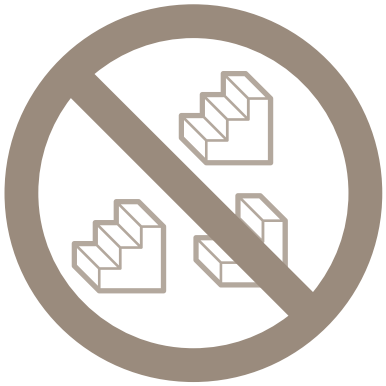
WHAT NEEDS FURTHER INVESTIGATION

- The copy associated with the Breakout selection, **'X data points broken-out by' confused every participant**
- Difference between '**Peer Group**', '**Breakout**', and '**Benchmark**' was not always clear
- Not everyone is **familiar with the notion of the 'Y-axis'**, may just want to call 'Vertical Axis' for clarity
- The **ability to jump around from step to step with one click** (as opposed to clicking "**previous**" or "**next**" several times until arriving at the desired step)
- The importance of **dynamic data**
- **Progress indicator**
- **Widget summary view**
- **Widget visualization customization**
- Too much clicking to create a widget. **Need to combine steps**



WHAT WERE THE PRIMARY TAKE-AWAYS

- **Users are happy with the shape that these 'widget-related' processes are taking.** These tasks seem generally intuitive and provide for the generation of detailed widgets that can breakout out unique data points by all users, not just IT/data people. Overall a positive experience across all participants.
- User liked the ability to create custom widgets, b**ut stressed that they need these created widgets to provide dynamic and live data**
- **User felt there were a lot of steps** to creating a widget as well as some questioning the order or paring of each.

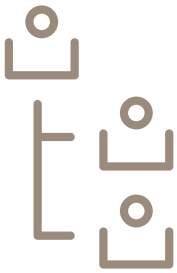


WHAT DESIGN CHANGES WERE MADE BASED ON SESSION

Progress indicator

Summary view

Cleaned up Widget Editing view, made more intuitive to user



Allowed Widgets to be broken out into greater detail allowing for more unique and valuable views

Session 4 | 12 Participants

WHAT WE TESTED

Sharing a Live Dashboard

Scheduling PDF Snapshots of a Dashboard

Bursting

WHAT WE GOT RIGHT

- Users clearly understood **the difference between Share and Schedule**
- Users clearly understood **what they were sharing or scheduling**
- Users appreciated the ability to **add a note to their email**

WHAT NEEDS FURTHER INVESTIGATION

- Is "Bursting" possible?
- Provide clarity around sharing
- **Define "Live Dashboard" better**

WHAT WERE THE PRIMARY TAKE-AWAYS

- Users liked the ability to **share and schedule their dashboards**
- Users **liked the frequency options**, but several felt that they were not clear enough
- Users are **excited about bursting capability**, but question PG's ability to provide this functionality
- Users require some sort of email admin tool where **they may import contacts, create lists, etc**.

WHAT DESIGN CHANGES WERE MADE BASED ON SESSION

- **Updated menu copy** to provide more pointed description and CTA
- **Provided a message field** for sender notes
- **Removed import contact icon/copy** and made **TO: field clickable** with tooltip