

# Harmony CQC Software Build

Dear Daniel,

I'm excited to provide you with a clear picture of what we're building and what you'll have in your hands within the next 1-2 weeks. Here's what you can expect:

## What You'll Receive

### 1. A Professional Web Application

You'll receive a professional web-based application that transforms your Excel-based Harmony CQC framework into a proper digital tool. This application will be:

- **Accessible from anywhere** via a secure website
- **Branded with your Harmony CQC identity**
- **Mobile-friendly** for use on tablets during practice visits
- **Secured with email-based authentication**

### 2. Core Skills Matrix Management

The heart of the application will be the enhanced skills matrix that's currently in your Excel spreadsheet:

- **Tasks organized by frequency** (continuous, daily, weekly, monthly, quarterly)
- **Risk ratings** visually highlighted for each task
- **Staff competency tracking** with all five status levels
- **Links to SOPs and policies** stored in Microsoft 365
- **Ownership assignment** for each task

### 3. Excel Migration Tools

To make transition seamless for you and your clients:

- **Import tools** to bring in existing Excel spreadsheets
- **Export functionality** to download data back to Excel format when needed

### 4. Complete Ownership

Upon delivery and final payment:

- **Full ownership** of all code and intellectual property

- **Hosting login details** so you control where the application lives
- **Source code** for future enhancements by any developer

## What This Means For Your Business

### Immediate Benefits

1. **Enhanced Professionalism:** Present yourself with a proper software solution rather than Excel files
2. **Time Savings:** Automate the tracking of competencies and task management
3. **Better Support:** Provide your clients with a more comprehensive tool that's easier to use

### New Revenue Opportunities

1. **Software Access Fees:** Charge practices for access to the software (beyond your current community)
2. **Implementation Services:** Offer setup and training for the software as a premium service
3. **Higher-Value Packages:** Bundle software access with your other services for higher-ticket offerings
4. **Recurring Revenue:** Create a maintenance program (as you mentioned at £197/month) that includes software usage

### Marketing Advantages

1. **Differentiation:** Stand out from competitors with a proprietary software solution
2. **Perceived Value:** Position yourself as more established with a professional software offering
3. **Demonstration Tool:** Show potential clients how your framework works in practice

## What It Will Look Like

The application will feature:

1. **Clean, Professional Interface:** Simple navigation with your branding
2. **Main Skills Matrix View:** A comprehensive table showing all tasks, risk levels, and staff competencies
3. **Task Management Section:** Forms for adding and editing tasks, SOPs, and policies
4. **Import/Export Tools:** Simple screens for uploading and downloading Excel data

## Also including Phase 2

1. **CQC "We Statement" Mapping:** Direct linking between tasks and CQC requirements
2. **Automated Notifications:** Email alerts when SOPs change and staff need retraining
3. **Approval Workflows:** Digital processes for reviewing and approving policy updates
4. **Advanced Reporting:** Generate inspection-ready reports for CQC visits
5. **Integration with Training Systems:** Connect with other healthcare systems

## Timeline and Next Steps

1. **Week 1-2:** Development of core application
2. **Delivery:** Working application with full documentation
3. **Handover Meeting:** Walkthrough of all features and functionality
4. **Follow-up Support:** Assistance with initial setup and usage

I look forward to delivering this valuable business asset that will help you scale your services and create new revenue opportunities while providing even better support to your GP practice clients.

Best regards, Sage

## Project Overview

The Harmony CQC governance framework is a software application designed to help GP practices in the UK meet Care Quality Commission (CQC) requirements. It replaces an Excel-based skills matrix with a proper database-driven application that tracks tasks, standard operating procedures (SOPs), policies, staff competencies, and CQC compliance.

This was previously managed with Excel spreadsheets but needs a more robust solution that can:

1. Track tasks by frequency (continuous, daily, weekly, monthly, quarterly)
2. Link tasks to SOPs and policies
3. Track staff competencies for each task
4. Automatically flag staff as needing retraining when SOPs are updated
5. Map tasks to CQC "we statements" for inspection preparation
6. Support Excel import/export for easy migration

## Current Status

We've designed the architecture and components for a full solution, but are now focusing on building a Minimum Viable Product (MVP) in 1-2 weeks with a £2,000 budget. The MVP will

focus on the core skills matrix functionality with minimal features to get something useful to the client quickly.

## Tech Stack

- **Frontend:** Next.js with Tailwind CSS
- **Backend:** Firebase/Firestore (serverless)
- **Authentication:** Firebase Authentication with magic links
- **Hosting:** Firebase Hosting or Render
- **Data Processing:** SheetJS for Excel import/export

## MVP Scope

1. Core skills matrix showing tasks and staff competencies
2. Basic CRUD operations for tasks and competencies
3. Excel import/export for data migration
4. Simple authentication

## Detailed Database Schema

// Simplified schema for MVP

```
interface Task {
```

```
  id: string;
```

```
  name: string;
```

```
  description: string;
```

```
  frequency: 'continuous' | 'daily' | 'weekly' | 'monthly' | 'quarterly';
```

```
  riskRating: 'low' | 'medium' | 'high';
```

```
  sopLink: string | null;
```

```
  policyLink: string | null;
```

```
}
```

```
interface User {
```

```
  id: string;
```

```
  email: string;
```

```
  name: string;
```

```
}
```

```
interface Competency {
```

```
  userId: string;
```

```
  taskId: string;
```

```
  status: 'training_required' | 'trained_awaiting_signoff' | 'competent' | 'retraining_required' |  
'retrained_awaiting_signoff';
```

```
  lastUpdated: Date;
```

```

}

// For future implementation
interface CQCWeStatement {
  id: string;
  text: string;
  category: string;
}

interface SOP {
  id: string;
  title: string;
  link: string;
  version: string;
  lastUpdated: Date;
}

interface Policy {
  id: string;
  title: string;
  link: string;
  version: string;
  lastUpdated: Date;
}

```

## Core Components Required

1. **SkillsMatrix**: Main component displaying tasks and staff competencies in a table format
2. **TaskForm**: For adding/editing tasks
3. **CompetencySelector**: For updating competency statuses
4. **ExcelImport**: For importing existing Excel data
5. **ExcelExport**: For exporting data back to Excel

## Implementation Plan

### Week 1: MVP Development

- Day 1: Project setup, Firebase configuration
- Day 2: Core database schema implementation
- Day 3-4: Build skills matrix UI and forms
- Day 5: Implement Excel import/export
- Day 6-7: Testing and deployment

## Future Phases (Post-MVP)

1. **Phase 2:** CQC "we statement" mapping
2. **Phase 3:** SOP approval workflows
3. **Phase 4:** Automated notifications
4. **Phase 5:** Microsoft 365 integration

## Next Steps

1. Create Firebase project and configure authentication
2. Set up Next.js project with basic components
3. Implement the core data model
4. Build the main skills matrix UI
5. Implement Excel import/export
6. Deploy to Firebase or Render

## Technical Requirements

- All code should be TypeScript-based
- Use Tailwind CSS for styling
- Mobile-responsive design
- Secure authentication with email magic links
- Data encryption for GDPR compliance

## Key Client Information

- Daniel runs a consulting business helping GP practices meet CQC requirements
- He has a community with 60+ paying members (£19.97/month) and 400+ free members
- This software will help him deliver more value to his clients and potentially support higher-ticket offerings
- All GP practices use Microsoft 365, which may be leveraged for document storage

## Business Context

The client's business model includes:

- Free community (400+ members)
- Paid community at £19.97/month (60+ members)
- Higher-ticket in-person training (£797/practice)
- Potential for a new maintenance program (£197/month proposed)

The software is intended to support this model by providing tangible value and making Daniel's business appear more established and professional.

## **Resources**

- Original Excel spreadsheet format from client (skills matrix)
- Governance framework diagram showing 8 interconnected modules
- CQC "we statements" will need to be added to the database

## **Project Constraints**

- £2,000 budget
- Need for a working solution within 1-2 weeks
- Focus on functionality over aesthetics initially
- Data must remain within UK/EU for GDPR compliance

