**Page ID**: **#.# CRDT Playbook**

# Primary Content

[SECTION = PLAN]

**Narrative**

Enter the **Narrative** for PLAN here (REQUIRED).

The plan phase is focused on identifying the project’s objectives and setting the stage for successful project completion.

Planning entails getting answers to fundamental questions:

* What is the problem that the CRDT aims to solve?
* What is the scope of the project?
* What is the timeline?
* What activities and resources will be needed to see the project through?
* By what measure will the team know in the end that the project was a success?

The first step is to identify the stakeholders. The stakeholders will likely include the individual(s) making the work request. Other stakeholders may include individuals that will use the template and/or those that will use the generated note. Sometimes management will need to be included to determine if there are impacts to other areas that need to be considered.

Next, schedule and conduct a kick-off meeting, and develop a problem statement. Although these activities are probably familiar to you, the information provided here is meant to best practices and tools that will support your work.

The kick-off meeting is a good time to:

* + Clarify the work request and document the details.
  + Draft a problem statement.
  + Gain stakeholder agreement on the scope of the project
  + Establish a timeline to set expectations.
  + Inform stakeholders of their responsibilities, and when their input is needed.
  + Identify additional inputs that are required.

If some stakeholders are not able to attend the meeting, you can meet with them individually. However, this approach is not ideal. The group setting best supports the most important activity – getting everyone to agree the task, the timing, and the responsibilities.

Finally, it is of utmost importance that the decisions and agreements made in the kick-off meeting are communicated in writing to all parties involved.

In the sections below, there are links to methods, examples of completed work products (artifacts), and tools, including a template for setting an agenda for a kick-off meeting. Use these to move through the plan phase.

**Checklist**

Enter the **Checklist** items for PLANhere. If there are no details, insert N/A or TBD.

Checklist: When you are finished with this step, you will have --

* Identified stakeholders.
* Conducted a kick-off meeting.
* Drafted a problem statement.

**Recommended Methods**

Enter the **Recommended Methods** for PLAN here. If there are no details, insert N/A or TBD.

* Problem Statement

**Example Artifacts**

Enter the **Artifacts** for PLAN here. If there are no details, insert N/A or TBD.

* Sample problem statement
* Sample kick-off meeting agenda
* Sample timeline

**Tools**

Enter the **Tools** for PLAN here. If there are no details, insert N/A or TBD.

* Agenda template
* Timeline template
* Problem statement template

[SECTION = EVALUATE]

**Narrative**

Enter the **Narrative** for EVALUATE here (REQUIRED).

The evaluate phase is focused on determining the degree to which the current design is meeting the quality objectives set by the team at the start of the project.

Human-centered design is generally thought of as an iterative process. As a result, evaluations of one kind or another are often conducted at several stages in the development of the design, from the early mockups all the way up to a fully coded product.

Evaluation supports CRDT development by providing the following:

* A check against the original set of requirements.
* A check to see if it meets best practices for clinical reminders.
* A check to see if there are any usability concerns.
* A set of recommendations for design improvements.

The evaluation method recommended in this playbook is called a **Heuristic Evaluation**. With this method, the CRDT is evaluated against a set of principles or rules of thumb called heuristics. When elements of a CRDT violate one or more of these principles, the expectation is that usability issues will likely be encountered if the product is deployed without repair.

***Figure:*** A heuristic evaluation is typically delivered in a report with screenshot, a description of the issue, the heuristic that was violated, a severity ranking, and a recommendation.

A screenshot of a social media post

Description automatically generated

**Checklist: When you are finished with this step, you will have --**

Enter the **Checklist** items for EVALUATEhere. If there are no details, insert N/A or TBD.

* Verified that the reminder produces the intended data for reporting.
* Evaluated each screen to identify usability concerns and issues.
* An action plan to improve the design.
* A report that documents these activities for the stakeholders.

**Recommended Methods**

Enter the **Recommended Methods** for EVALUATE here. If there are no details, insert N/A or TBD.

* Heuristic Evaluation

**Example Artifacts**

Enter the **Artifacts** for EVALUATE here. If there are no details, insert N/A or TBD.

* Sample data and test protocols
* Heuristic reports

**Tools**

Enter the **Tools** for EVALUATE here. If there are no details, insert N/A or TBD.

* Heuristic checklist