



Open Customer Metrics Framework

Guiding, Not Grading

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Open Customer Metrics Framework
V1, Spring 2016

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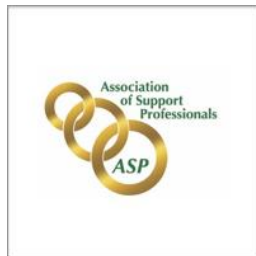
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The latest version of the Open Customer Metrics Framework is at:

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Agenda

- Background
- Framework and 5 Categories
- Attribution/How to Get Involved

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Background

- There is no standard way for Customer Support/Service leaders to report on what we measure. Even worse, we measure too much and much of what we measure isn't relevant.
- The team at [Klever](#) was working on this problem for a while and decided there was great value to creating an open standard that we can all benefit from. This is v1 of that collaboration.

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Background

- Measurements are a way of communicating what is important to the organization
- A good measurement system
 - is simple enough to focus attention on a few key elements that are important.
 - is fair enough so that people at every level believe they can affect the measures.
 - facilitates an environment of learning and dialogue – not of control and compliance.

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Background

- Five categories of measures, and within that, suggested measures for executives and suggested measures for managers.
- Balance between listening to our Customers, Employees and the Business, and applying what we learn.
- Framework, adjust according to your needs.
- Working definitions, not looking for precision.

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| Category | Definition | Focus | Rationale |
|-----------------------------|---|-------|---|
| Customer | How well are we meeting the needs of customers? | 20% | The reason we exist |
| Employee | How well are we meeting the needs of employees? | 20% | Knowledge workers need meaningful work |
| Business | How well are we meeting the needs of the business? | 30% | Expanding the focus outside just cost |
| Knowledge/ Collaboration | How well are we capturing and re-using what we already know in our ecosystem? | 20% | 60 – 90% of what we do has been done before |
| Acceleration | What is the rate of progress against projects that will transform our business? | 10% | In a highly interrupt-driven environment, how do we ensure we make progress on the ‘important’ not just the ‘urgent’. |

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| Measures for executives | Measures for managers |
|---|--|
| <p>Options for relationship component include:</p> <ul style="list-style-type: none"> • Net Promoter Score* • Secure Customer Index** <p>* Servicemark of Bain & Company, Satmetrix Systems, Inc. & Fred Reichheld ** Copyright of Burke</p> | |
| <p>Options for transactional component include:</p> <ul style="list-style-type: none"> • Customer Satisfaction score (all teams) • Customer Effort Score 2.0* <p>* Copyright of CEB</p> | <p>Options for transactional component include:</p> <ul style="list-style-type: none"> • Customer Satisfaction score (your team) • First Contact Resolution or • First Day Closure |
| <p>Emerging Measure:</p> <ul style="list-style-type: none"> • % of Serviceability Suggestions made by Customers Accepted | <p>Emerging Measure:</p> <ul style="list-style-type: none"> • Trend of Serviceability Suggestions made by Customers |

Note: Emerging measures may not initially be highly valid or reliable, but are relevant. As measures become more valid and reliable, they become metrics.

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| Measures for executives | Measures for managers |
|---|---|
| <p>Options for relationship component include:</p> <ul style="list-style-type: none"> Employee Engagement (all teams) | <p>Options for relationship component include:</p> <ul style="list-style-type: none"> Employee Engagement for team |
| <p>Options for transactional component include:</p> <ul style="list-style-type: none"> Employee Satisfaction (all teams) Employee Turnover (all teams) | <p>Options for transactional component include:</p> <ul style="list-style-type: none"> Employee Satisfaction for team Employee Turnover for team Time to Proficiency for team |
| <p>Emerging Measure:</p> <ul style="list-style-type: none"> % of Serviceability Suggestions made by Employees accepted | <p>Emerging Measure:</p> <ul style="list-style-type: none"> Trend of Serviceability Suggestions made by Employees |

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| Measures for executives | Measures for managers |
|---|---|
| <p>Options include:</p> <ul style="list-style-type: none"> • Profit Margin of Service Revenue or • Service Revenue per Support Employee • Support Revenue Growth • % Variance against Budget Forecast <p>One of:</p> <ul style="list-style-type: none"> • Support Cost as a % of Revenue • Support FTE as a % of Company FTE • Warranty Costs as a % of Sales | <p>Options include:</p> <ul style="list-style-type: none"> • Case Load per Support Employee by Product or Service • Revenue per Support Employee by Product or Service |
| <p>Advanced Emerging Measure:</p> <ul style="list-style-type: none"> • Klever’s Law: Customer Time to Value | <p>Advanced Emerging Measure:</p> <ul style="list-style-type: none"> • Time to Smile |

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Working Definitions

- **Klever's Law: Customer Time to Value** = Time to Value (*before sale*) + Time to Value (*after sale*) + Time to Smile (*after interruption*)
- **Time to Smile** is the total elapsed time between when a customer has their ability to use the product/service interrupted to the time they got back to a happy state.

| Measures for executives | Measures for managers |
|--|---|
| <p>Options include:</p> <ul style="list-style-type: none"> • Level Zero Solvable • Time to Publish • Ratio of New to Known Incidents being handled by the Support organization | <p>Options include:</p> <ul style="list-style-type: none"> • Attach Rate • Level Zero Solvable • Reuse Rate • Participation Ratio • Article Quality Index |
| <p>Emerging Measures:</p> <ul style="list-style-type: none"> • Collaboration Effort Score (all teams) • % of Knowledge-driven Suggestions that are Accepted | <p>Emerging Measures:</p> <ul style="list-style-type: none"> • Collaboration Effort Score (for team) • Trend of Knowledge-driven Suggestions made |

Tips for Executive

- ***Level Zero Solvable***
take the actual words your customers use when they contact you and use these as search terms on your online website to see what percentage of solutions could have been solved by your customers if this information was available online.
- ***Time to Publish***
How fast it takes to go from known internally to available externally. (Think minutes, not weeks.)
- ***Collaboration Effort Score***
gives you a sense of how easy or difficult it is for teams to interact across groups.
- ***% of knowledge-driven suggestions that are accepted***
closes loop between actionable information from knowledge articles and your doing something about it.

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| Measures for executives | Measures for managers |
|--|---|
| <p>Options:</p> <ul style="list-style-type: none"> • Measures Rationalization Project • Think through how to engage with employees and include their input into decision making • Knowledge Management • Bringing down Time to Smile by 50% | <p>Options:</p> <ul style="list-style-type: none"> • Adoption/communication/training/measuring the results or impacts of the projects • % of Projects completed on time • % of Projects completed within budget |

Rationale:

In the interrupt-driven world of customer support, we rarely have the luxury of uninterrupted time to make big improvements. In order to do that, we have to slow down and think, try intelligent experiments and adopt a learning loop that allows us to make significant improvement in outcomes.

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Working Definition

Measures Rationalization Project: Take an inventory of what you currently are measuring (and why), what you do with it and then see how to make a transition to the measures in the Open Customer Metrics Framework.

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Thanks & Q/A

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