



Open Customer Metrics Framework

Guiding, Not Grading

The latest version will always be available at:

www.OCMFgroup.org

Open Customer Metrics Framework
V1, Spring 2016

Overview

- Audience/Purpose
- How to use this
- How to cite
- How to help

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- 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

- 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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Observations

- 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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Observations

- The two most difficult transitions for most executives will be
 - Moving from measurements as a means of ‘control and compliance’ to ‘listening and learning’
 - Letting go of measures you have historically relied on and starting to capture and use harder-to-measure categories like Knowledge/Collaboration and Acceleration.

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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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Working Definition & Tip

- *Focus percentage* is the default suggestion for percentage of focus we expect an executive would spend on a particular category of measures.
- **Tip:** Explain the context and intent of measures so people can understand what you are trying to accomplish.
- More tips online.

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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.

Working Definition & Tips

- Serviceability Suggestions are service-related suggestion from customers or employees.

Tips:

- First Contact Resolution (and First Day Closure) is highly correlated with Customer Satisfaction, and it is something your managers can impact, so that is why it is included in the manager side.
- Start collecting and acting on service-related suggestions from your customers.
- More tips online.

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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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Working Definitions & Tips

Working Definitions:

- **Employee Engagement** is a periodic survey that measures how emotionally connected an employee is to the organization. There are a number of commercial options that your HR team may have already engaged with, or you can create your own as many organizations have done.
- **Employee Satisfaction** is a periodic survey that measures how happy an employee is with their current job and conditions.
- **% of Serviceability Suggestions from Employees Accepted** are the suggestions from your employees that are accepted (implemented) as a percentage of those that were submitted.
- **Time to Proficiency** is a measure of how quickly a new team member is 'proficient' in their job or how quickly an existing team member learns a new skill.
- More tips online.

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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 & Tips

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.

Rationale:

- Leading Support organizations have realized that we have fixated on cost and efficiency at the expense of a superior customer (and employee) experience. This is one category where we should pull back on some of what we currently measure and report on, to free up mindshare to think about and act on some of the other categories of measures.
- More tips online.

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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

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Working Definitions & Tips

Working Definitions:

- [Level Zero Solvable](#)
The percent of incidents resolved by the Support organization that could have been resolved by the customer using self-service.
- [Time to Publish](#)
'Publish most of what you know, quickly, to your customers and it will dramatically improve customer success with self-service.'
- [Ratio of new to known](#) incidents being handled by the support organization
- **Attach Rate**
'How many incidents have at least one knowledge article attached to it'
- [Participation Ratio](#)
- [Article Quality Index](#)
- **Collaboration Effort Score**
This is an emerging measure that is best handled by a survey question. Something like "Department X makes it easy for me to collaborate with them."
- **Knowledge-driven suggestions** are suggestions for improvement that are made by analyzing the data from your knowledge articles.
- More tips online.

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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.

Working Definition & Tips

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.

Tips:

- Focus on the long term view -- which may be as long as a multi-year goal -- while delivering value each quarter.
- Make sure you get top management sponsorship and communicate early and often to ensure that they still support the project.
- As you choose which Acceleration projects to start with, consider the capacity of your team/organization to do the work that is needed, and the capacity of the organization to adopt the changes.

More tips online.

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Resources

- Open Customer Metrics Framework Group online (www.OCMFgroup.org)
- Has a list of online and updated resources

What to do next

- Feel free to share this within your organization
- Ask your CRM vendor to participate in the standards and make it part of their software
- Find more resources online:

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