Developing Performance Metrics & Trend Charts

A primer in measuring what matters from a customer perspective
Introduction

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Today’s Key Takeaways

1. How to identify and measure what your customers value.

2. How to track and visualize this data to help inform your problem solving and decision making
What is a Performance Metric?

- A measurement of the activities or outputs of a process, team, or organization over time.
  - # of Drivers Licenses issued/renewed each week
  - % of incoming calls answered in under one minute

- Includes data showing the current conditions, sometimes compared against pre-defined goals or targets.
Key Steps to Building a Performance Metric

1. Determine what customers value
2. Define and document a Metric
3. Identify targets and track progress
4. Visualize and use the data to improve
Step #1 - Determine what customers value

- What is the key **service** we are focused on improving?
- Who is the **customer** of this service?
- What does the customer **value** from this service?
- What **goal** can we set to increase this customer value?
#1 - Determine what your customers value

<table>
<thead>
<tr>
<th>Key Service</th>
<th>Customer</th>
<th>What Do Customers Value?</th>
<th>Goal that Increases Customer Value</th>
</tr>
</thead>
</table>
| Issuing New Business Licenses        | People who want to start and operate a business within the state. | ● How fast the application is processed  
● How easy the process is                                                 | ● Reduce time to approve apps  
● **Eliminate the current backlog of new business applications**  
● Increase applicant first-pass compliance %            |
| Answering Incoming Calls             | People looking for assistance from social support services | ● That their call is answered quickly  
● Primary issue gets resolved                           | ● Reduce average time to answer  
● Increase 1st call resolution %                      |
| Creating Financial Reports           | Other teams in my department                  | ● Reports do not have errors or missing data  
● Reports are not delayed                                 | ● Increase the % of complete and accurate reports delivered each week  
● Increase # of reports delivered on-time                |
Key Steps to Building a Performance Metric

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2. Define and document a Metric
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Step #2 - Define and Document a Metric

**Metric Title:**
Eliminate the current backlog of applications (New Business Licenses)

**Metric Description:**
Tracking the completion of 100 pending applications for new business licenses that have not gone through the decision process

**Metric Calculation**
Weekly total of applications in the backlog that have been decisioned

**Data Owner**
Business Licenses Group Manager

**Data Source**
Hand-count of decisioned apps added up and entered into spreadsheet

**Update Frequency**
Weekly on Monday
Key Steps to Building a Performance Metric

We will cover Steps 3 and 4 in this example workbook
(Feel free to open and make a copy for reference)
Thank you for attending!

Questions?

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