

# Meaningful Metrics for Your Organization

Jane Martel | March 2, 2021

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What are metrics?

Metrics are quantitative measures used to track organizational performance.

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## What is meaningful?

- Represents the truth
- Aids decision-making
- Measures what matters

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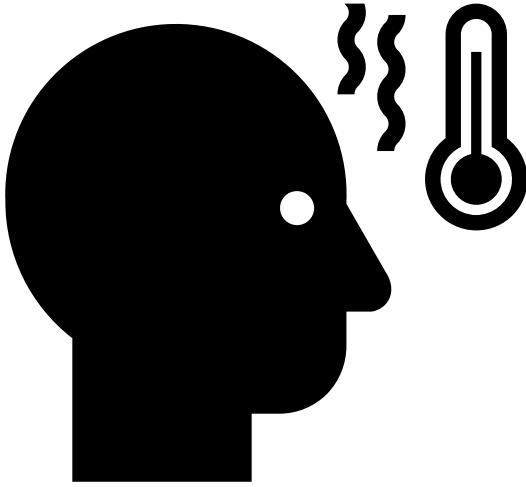
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An organization's metrics can answer the question, how are you?



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## A signal to investigate further

As with taking your temperature, knowing your metrics can tell you that something is wrong (you have a fever) but not necessarily *what* is wrong or causing it.

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## Personally meaningful

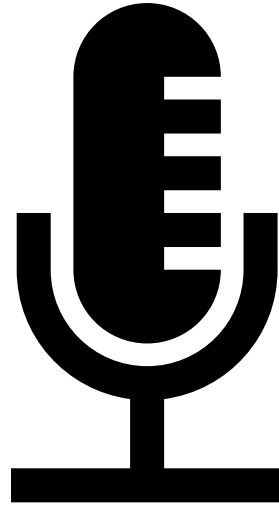
In chat, list a meaningful metric that you track in your personal life.

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Raise your hand if  
you'd like to share  
*why* you track what  
you do.

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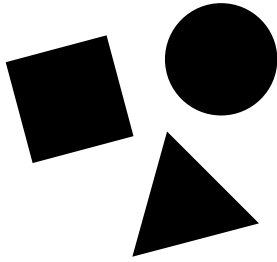
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## My goals for today

	Inspire you to use what you learn
	Involve you in learning so you remember
	Equip you to select meaningful metrics for your organization

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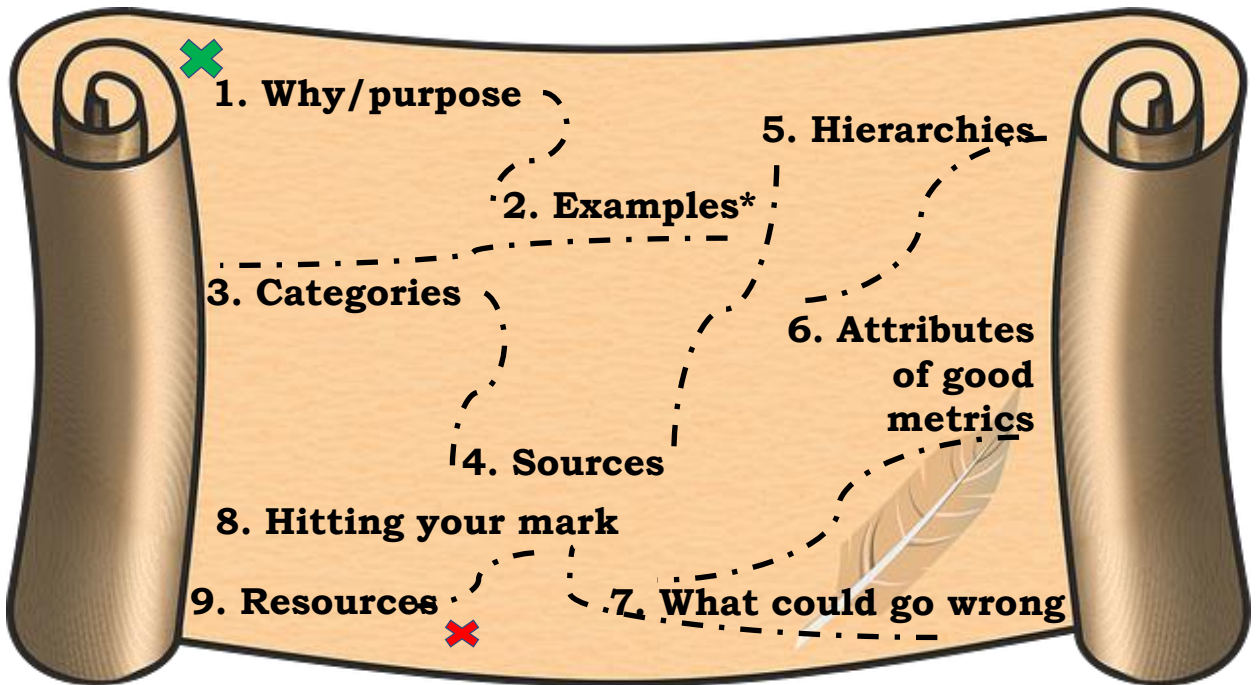


# What won't happen today

You won't leave the webinar with *the* answer to, what metric(s) should my organization use?

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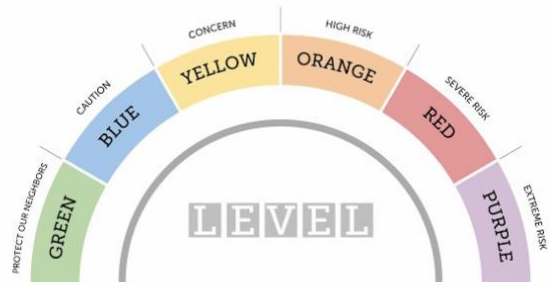
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## You'll recognize these metrics...

New cases of COVID-19, or cases per 100,000 residents

COVID-19 test positivity rate (a percent)

Number of hospitalized residents



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## Examples of metrics any organization might use...

Employee turnover rate

Supply room stock outs

Accounts needing correction

Percent increase in new customers

Percent of timesheets submitted accurately and completely

First call (or contact) resolution

Net Promoter Score (NPS)

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## For libraries...

Number of challenged materials (<https://www.lrs.org/public/data/challenges/>)

Claims returned

For benchmarking, you might use these per capita metrics from <https://www.lrs.org/public/data/trustees/>

Expenditures

Library visits

Circulation

Program attendance

Reference transactions

Internally, you might prefer to track percent change or to compare to a target number.

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## More Performance Metrics Examples

Calls per hour

Average attendees per program

Average “handle” time (e.g., time per call)

Items shelved per hour; items cataloged per hour

Reference questions answered

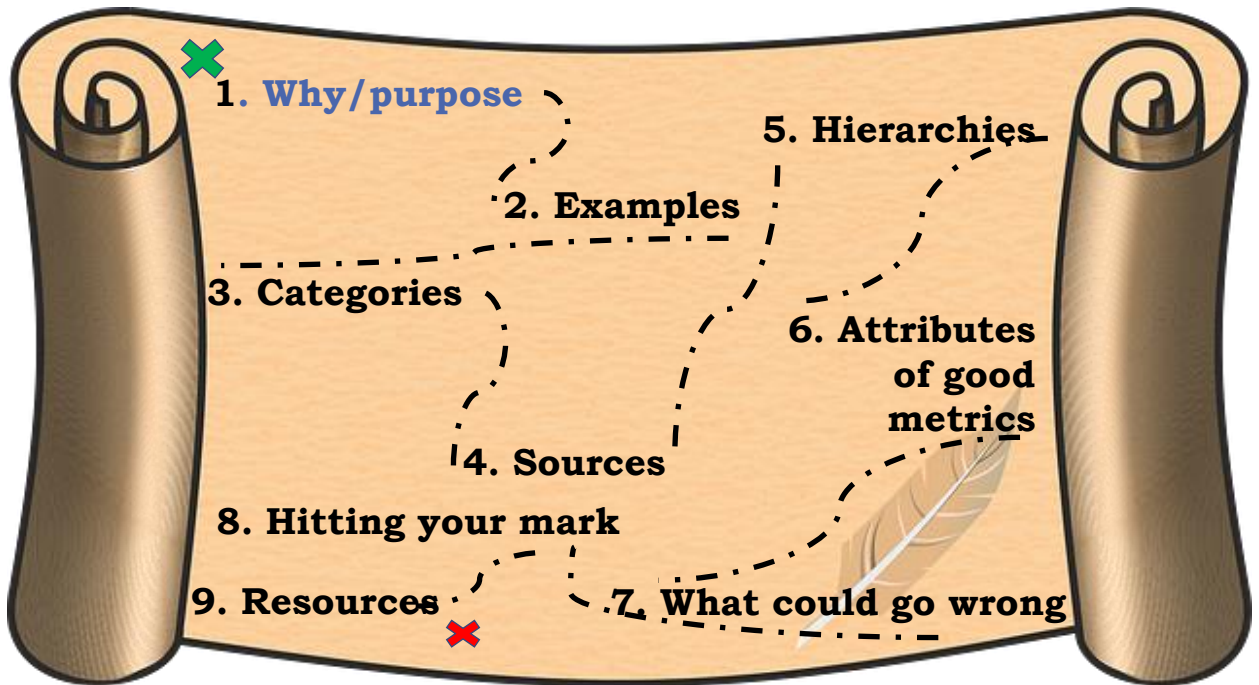
Order entry accuracy

Acquisition cost of new patrons

Percent active patrons

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# The existential why

Purposes and uses of metrics

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## Purposes of Metrics



Track performance against strategic objectives



Monitor tactical / operational performance (quality, cost, speed)



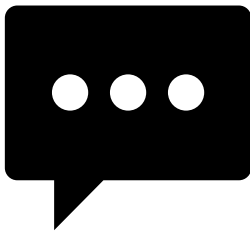
Manage processes that create operational and strategic outcomes



Ensure needs of different stakeholders and customers are being met

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Why is having the *right* metrics essential? Weigh in on chat.

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# Why the right metrics are essential



Allow alignment of all organizational activities around what is important



Document what works and doesn't for improvement purposes



Facilitate transparency



Enable celebrating success

The Lean Prescription: Powerful Medicine for Our Ailing Healthcare System, Patricia A. Gabow and Philip L. Goodman, Taylor & Francis Group, LLC, 2015, p123

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# Selecting Meaningful Metrics

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Poll: In general, right now, what do you think your organization is trying to do?

- Grow/increase** something (e.g., number of patrons served, grant revenue)?
- Control: Maintain** at a certain level (e.g., stay within budget)?
- Defensive: Prevent** an occurrence of something undesirable (e.g., system downtime; permitting headcount to go above a certain level)

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What to  
measure?  
The 50,000'  
view

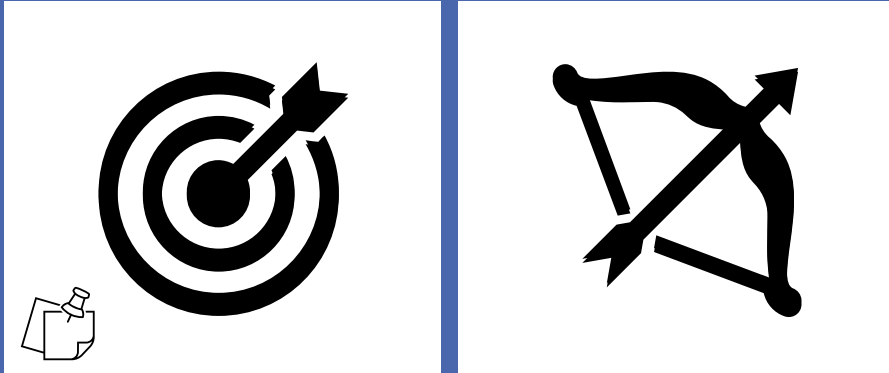
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Which metrics will help the organization progress from where it is to where it wants to be in the future?

Focus on those metrics most important to success.

Consider those that can predict results and success, that drive performance...

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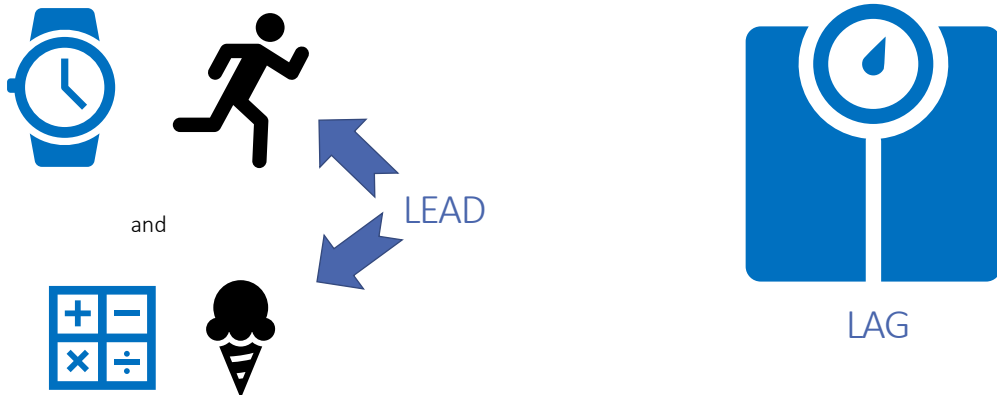
You need a target, and you need to know what is influencing your results.

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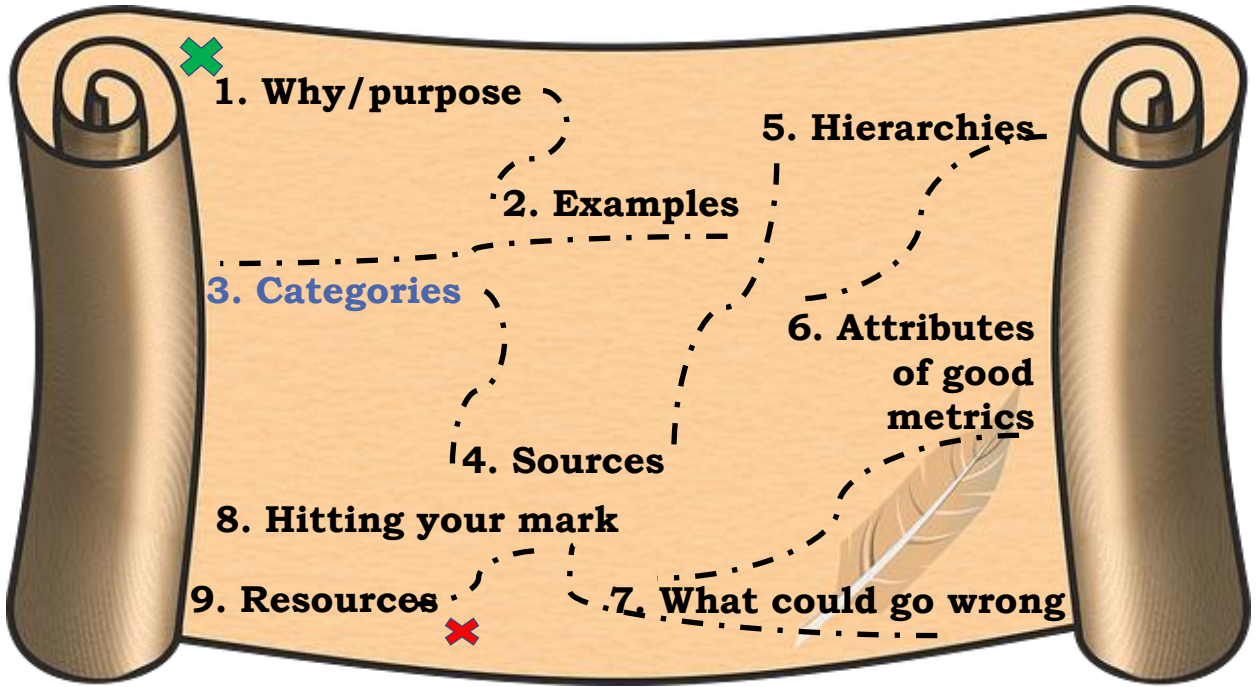
## Lead and Lag Measures

Readers Advisory: Read the book, The Four Disciplines of Execution



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## Categorizing Metrics

- External, internal
- Effectiveness, efficiency
- Leading, lagging
- Monitoring, diagnostic
- Strategic, operational

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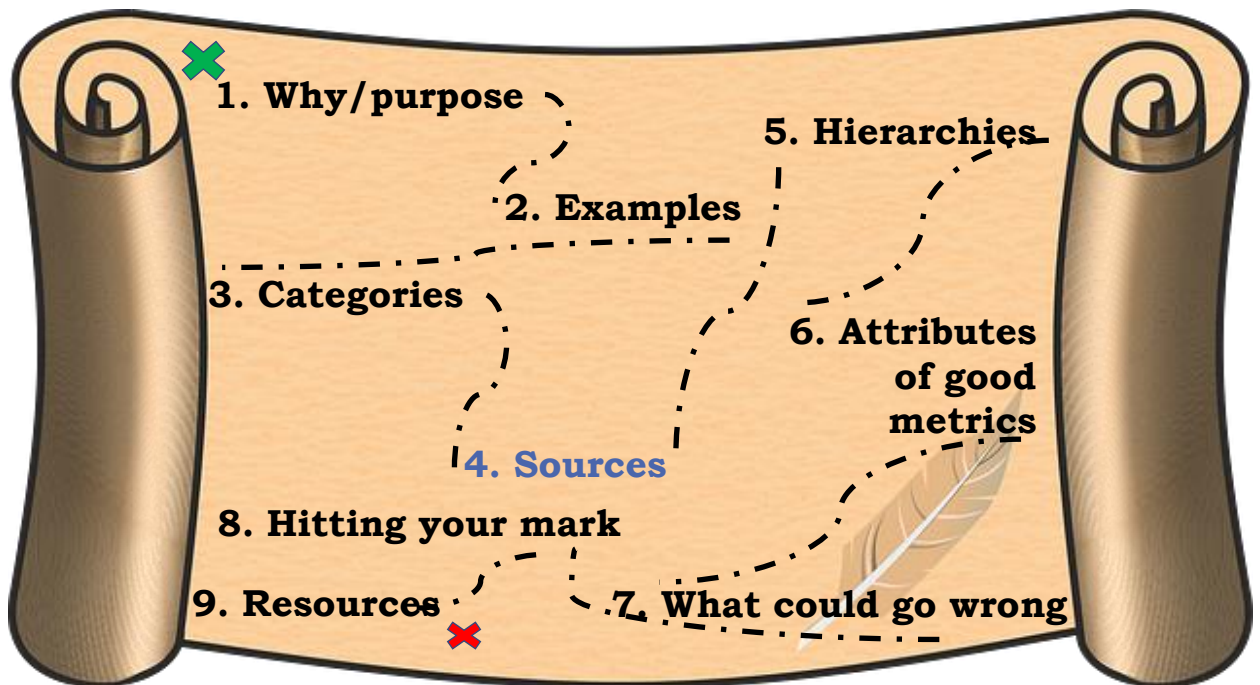
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External	Internal	Effectiveness	Efficiency	Leading
Lagging	Monitoring	Diagnostic	Strategic	Operational

## Poll: What are you missing?

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# Where do metrics come from?

Voice of the Customer

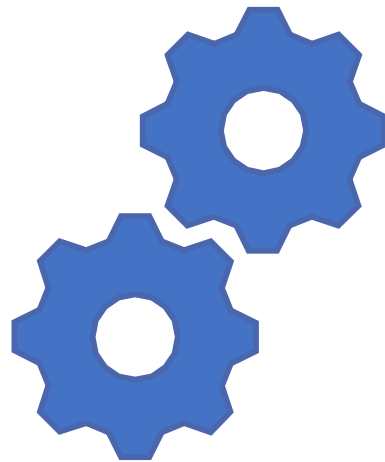
Voice of the Process

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# Why care about process metrics?

Processes create your products and services. They generate your output, what you do for customers.



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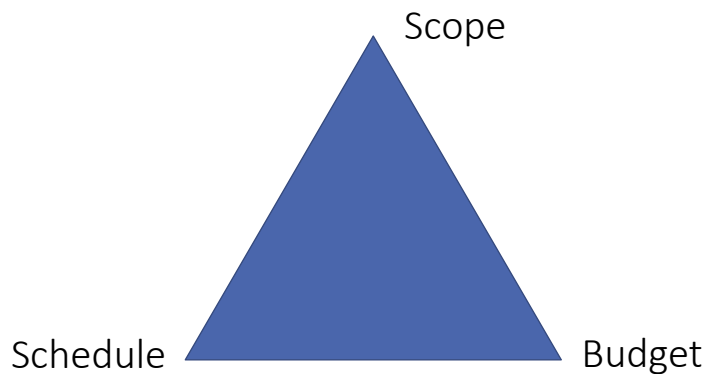
Vision,  
Mission,  
and  
Strategies

Projects

Operations /  
Processes

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## “The Iron Triangle” for Projects



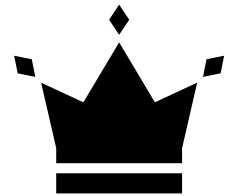
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## Voice of the Customer (VoC)

Needs, expectations, satisfaction  
How do they feel about your organization?  
What's important to them?  
Are you meeting their requirements?



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## Examples of VoC

Net Promoter Score (NPS)

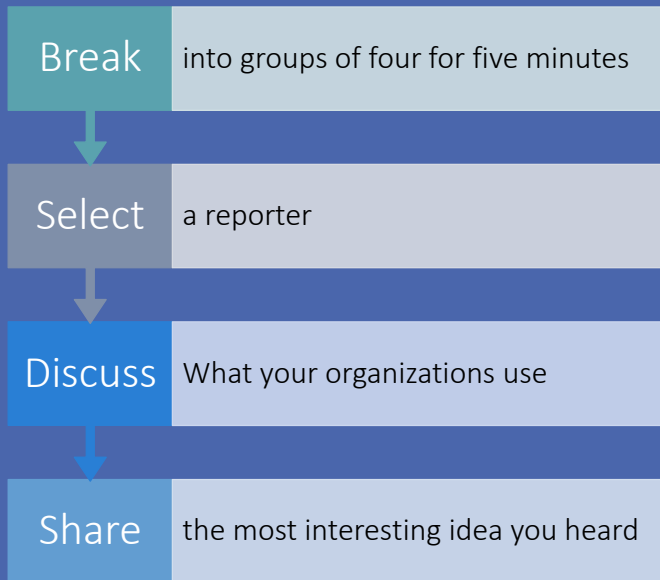
Survey results: importance versus satisfaction

Evaluation sheets for program or training attendees

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How do you know what your customers want, need, require?



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## Voice of the Process

M: Money  
E: Errors  
A: Amount  
T: Time

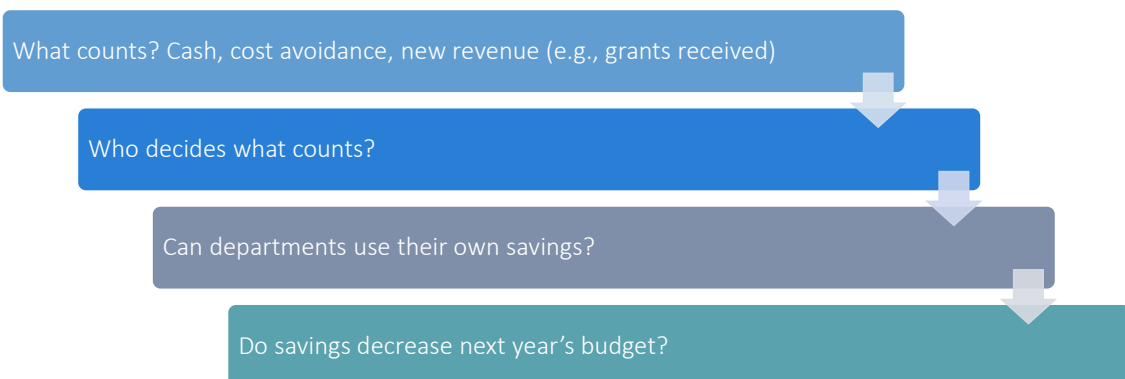
## Examples of Money Metrics

Expenditures per capita  
 Inputs ÷ outputs  
 Percent change in grant revenue received  
 Average cost to convert a new patron to an active patron  
 Total cost per program  
 Percent of project budget spent  
 Cost of postage  
 Overtime pay

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## Challenges of using money metrics



The Lean Prescription: Powerful Medicine for Our Ailing Healthcare System, Patricia A. Gabow and Philip L. Goodman, Taylor & Francis Group, LLC, 2015, p125

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## Examples of Error Metrics

Number of incomplete budgets submitted

Percent of reports turned in after due date

Number of holds not on hold shelf when patron arrives to pick them up

Number of hours understaffed

Days where materials processing targets not met (e.g., shelved w/in 36 hours)

Percent defective

Defects per million opportunities (DPMO)

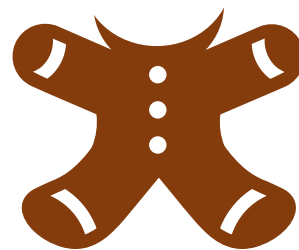
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## Defects versus Defective



A



B

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# Amount Metrics

Volume-related target

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## Examples of Amount Metrics

Average number of job applications received per position posted

Number of items circulated per year

Number of patrons served

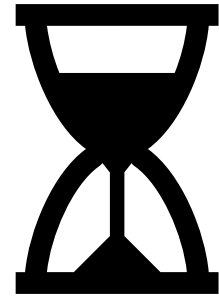
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# Time Metrics

How many per period of time

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## Examples of Time Metrics

Average time patrons wait before title on hold is available

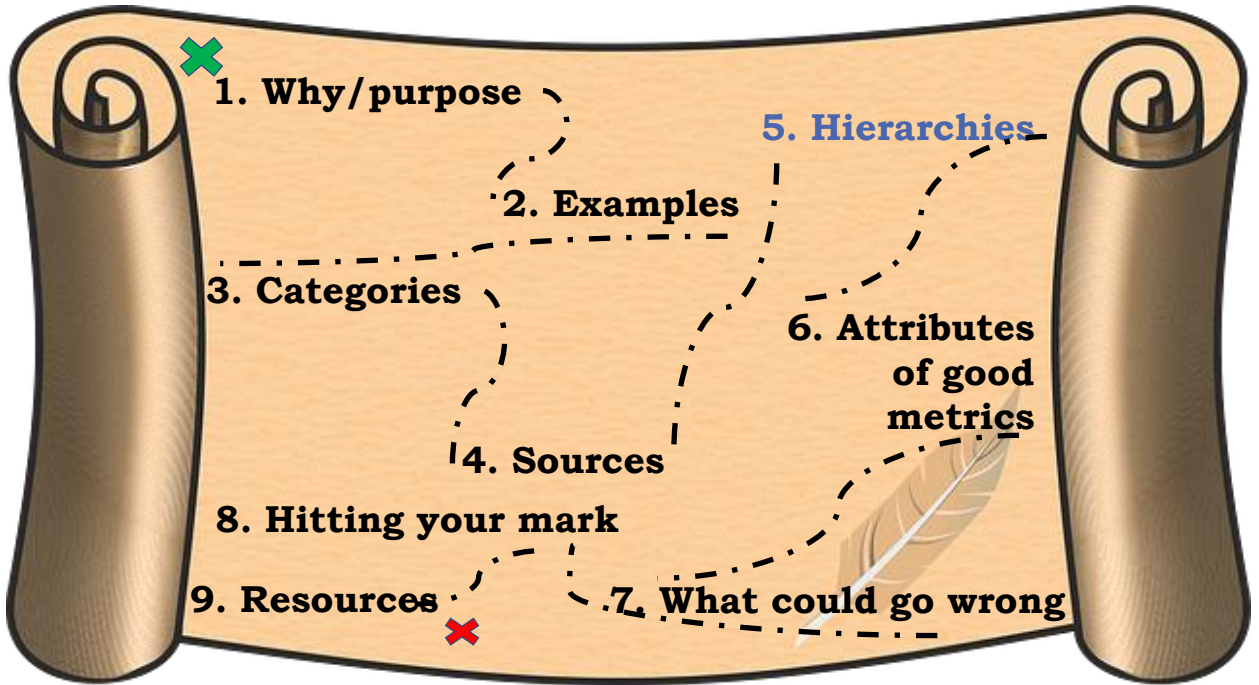
Average wait time for call center to answer

Items shelved per hour

Lead time

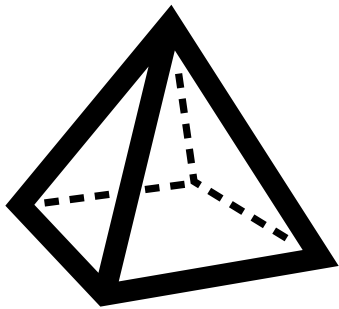
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# Metrics Hierarchies

Supporting the next level up

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## Why hierarchies?

Consider this definition: “A metric is a measure that provides vital information about important issues, the status of efforts, and progress (or lack of it) to a person or group who can **significantly impact** the measure through direct, hands-on, micro-process efforts.”

Office Kaizen: Transforming Office Operations into a Strategic Competitive Advantage, William Lareau, ASQ Quality Press, Milwaukee, WI, 2003, p130

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## Metrics Meaningful to Individuals

### MEANINGFUL

Number of purchase orders processed (for an accounting clerk)

Percent reduction in processing time (for the process team tasked with improvement)

### NOT SO MEANINGFUL

Overhead costs (for a library to a part-time employee at that library)

Daily closing stock price of a corporation (for a supervisor)

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# Cascading metrics

Think about your organization's **vision, mission, and values**. What do you need to measure related to them?

How about your organization's **strategies and objectives** that support the mission, etc.?

What metrics will you use to ensure that your **processes, projects, and resources** are aligned with your strategies and objectives?

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Gaylord Opryland Resort and Convention Center in Nashville

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## Opryland Example from “The 4 Disciplines of Execution”



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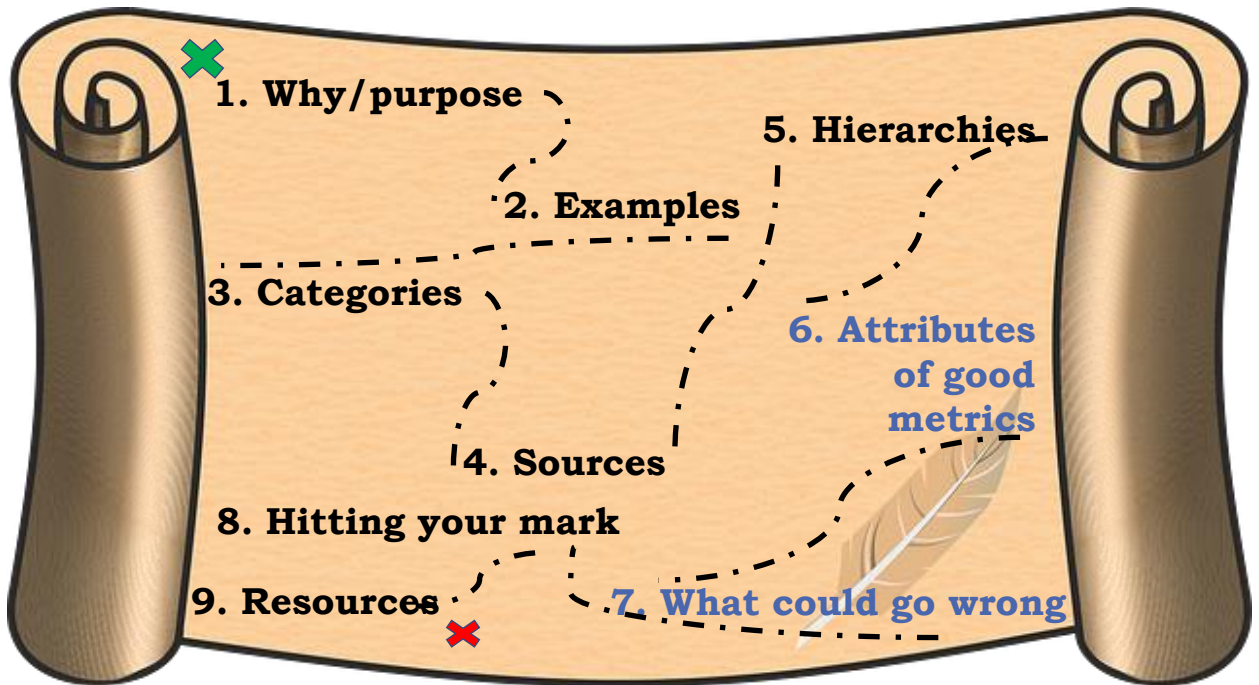
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## Example of CX Metrics Hierarchy

Level	Metric
Organization	Net Promoter Score >75
Library Operations Division	Fewer than 10 written or called in complaints from patrons per 1,000 served
IT Department	System downtime of <1% of time; download speed of [x]
Individual in IT	Perform weekly maintenance protocols for seven systems; perform quality checks twice daily
Library X	Greet 96% of patrons within two minutes of entering library; 98% of patrons who come in for an item leave with one
Supervisor in Library X	Schedule one “greeter” and a backup for every hour

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# What could go wrong?

Data unfit for use  
Gaps, misalignments, conflicts

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**Table 1.1** Characteristics of data that make them fit for use.

<b>Free of defects</b>	<b>Desired features</b>
Correct	Contextual
Complete	Pertinent
Valid	Comprehensive
Reliable	Easy to read
Consistent	Unambiguous
Unique	Easy to understand
Current	Right level of detail

Data Quality: Dimensions, Measurement, Strategy, Management, and Governance, Dr. Rupa Mahanti, ASQ Quality Press, Milwaukee, WI, 2018, p 10

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## Gaps

Important areas left with no measurement

Example: No measurement for your new strategic goal of improving diversity, equity and inclusion in your organization

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## Misalignments

One metric drives another in the wrong direction

Example: increased focus on virtual programming...at the expense of in-person programming, or vice versa

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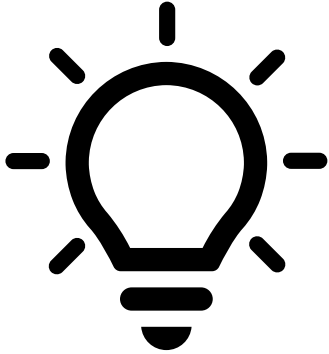
## Conflicts

If the metric is driven by other metric(s), if they all go in one direction, will the outcome be what is desired?

Example: Patron usage goes through the roof. Therefore, we need more staff to adequately meet patrons' needs but our budget is fixed, and we have a headcount max imposed by the county. Did we put ourselves in a dilemma?

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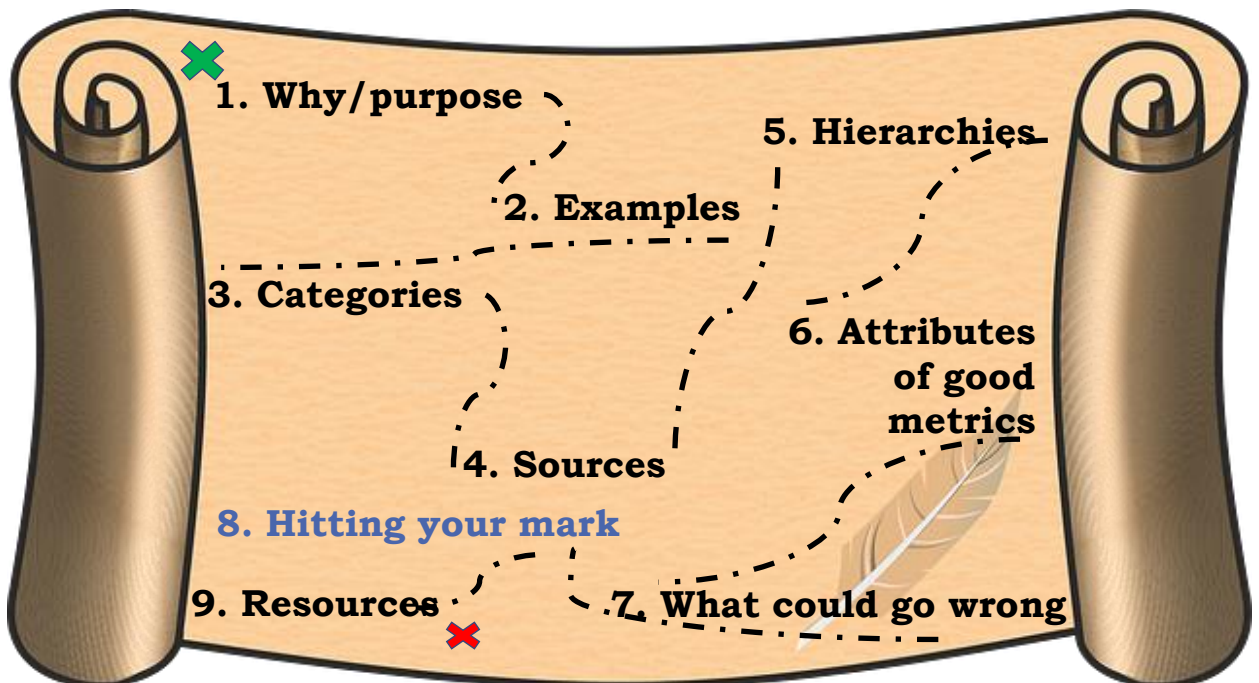


## Take a few minutes

...to individually come up with one specific example of your choice of either a gap, conflict, or misalignment of metrics. Use a theoretical example or one from your experience. Share in chat.

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# Metrics that Hit the Mark

Are you likely to get what you are aiming for?  
Will this metric work for you?

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## Ask Yourself

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- How **available** is the data? Do you have it now? Might security, confidentiality or other proprietary factors impact availability?
- Is the data **reliable**? Was it collected accurately, processed consistently, version-controlled? Is it free from manipulation or tampering?
- Is it **worth the cost** to gather, process, store, analyze, report and use? Can we afford it?
- Do you have too many? Not enough? Do all levels in your organization have metrics?
- Do all **employees understand** them and their role with respect to them?

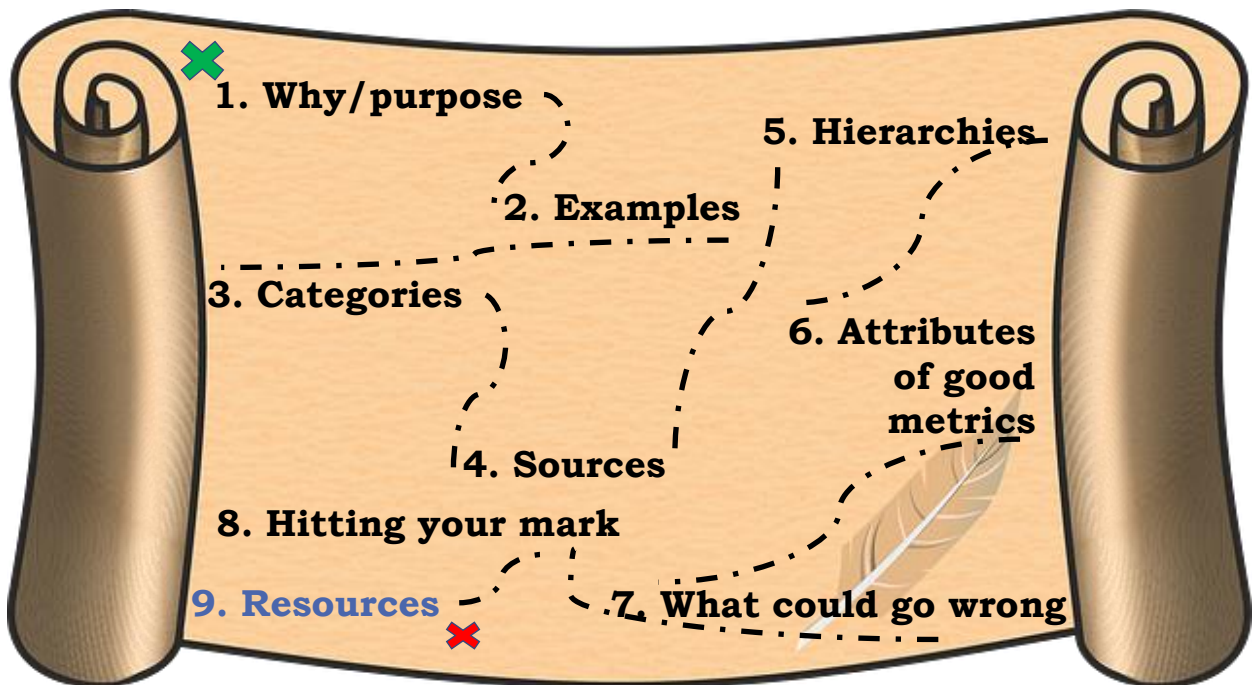
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## Final Reality Check

- ✓ Do our customers (or employees!) care about this measure?
- ✓ Is this a measure that we can influence or affect?
- ✓ Will this measure give us useful, actionable feedback?
- ✓ Will having this measure (even potentially) lead to my organization getting better?

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# Resources

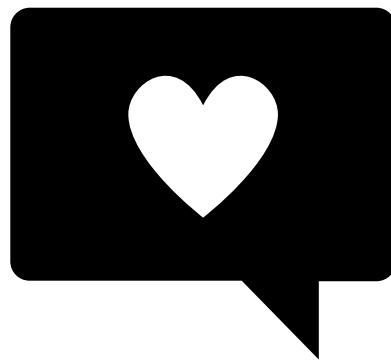
There is so much more to learn

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What are  
your favorite  
metrics-related  
resources?

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## My Favorites

<https://www.lrs.org/>

<https://www.cosla.org/MtM>

[asq.org](http://asq.org)

[apqc.org](http://apqc.org)

Process- and quality-oriented sites



The 4 Disciplines of Execution, by Chris McChesney, Sean Covey and Jim Huling, Free Press, New York, 2012 (2<sup>nd</sup> edition coming out in April 2021)

KPI Checklists: Develop Meaningful, Trusted, KPIs and Reports Using Step-by-step Checklists, by Bernie Smith, Metric Press, Sheffield, England, 2013

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## Your Next Step

Join me in exploring the dark side of metrics: the havoc they can wreak; who to tell what about your metrics; the care and feeding of metrics to keep them alive; when it's time to dump them; and minimizing unintended consequences

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## Parting Tips

“Less is more.”  
Focus on what matters  
most and what you  
need to know

Ensure that all  
employees can see  
themselves in the data

Hold your metrics  
lightly; make them  
work for you

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# Thank You

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