



IACA

File in to the Buckeye State

Columbus, Ohio 2016

KPI's, Dashboards and Metrics: What's it all About?

June 7, 2016 8:30am – 10:30am



Agenda

- KPIs, Metrics, Dashboards Defined
- Sample KPI Progress Report
- Case Study
- Benefits
- Questions & Answers

What is a KPI?

- ❑ A significant metric that measures business performance.
- ❑ *A KPI is an actionable scorecard that keeps your strategy on track. KPIs enable you to manage, control, and achieve desired business results.*
- ❑ KPIs differ depending on the nature of the organization and its strategy and goals. A Secretary of State's corporation division may monitor the number of online hits daily to learn how eFiling usage is increasing or decreasing.

What is a Metric?

- ❑ **Metrics** are a group of measurable data points related to core functions using data readily available in the agency systems.
- ❑ The best way to determine the set of metrics is by defining a vision of success for an agency and evaluating which metrics most accurately measure progress towards an end goal.

What is a Dashboard?

- ❑ **Dashboards** are best known as real-time depictions of KPIs and Metrics utilizing graphical/data cues.
- ❑ **Dashboards** for monitoring business performance can be easily constructed from existing data systems.
- ❑ Agencies should also consider leveraging technology and options built into backend systems such as MS SQL Server and Google Analytics.

Desired Business Results (Agency Goals)

- Goal # 1 - Increase online filings by 25% annually
- Goal # 2 - Reduce rejections by 15% (Accuracy)
- Goal # 3 - Increase staff productivity by 30% (Velocity)

KPI Progress Report (Scorecard)

	Goal 1	Goal 2	Goal 3
Example			
Data Source			
Frequency			
Chart			

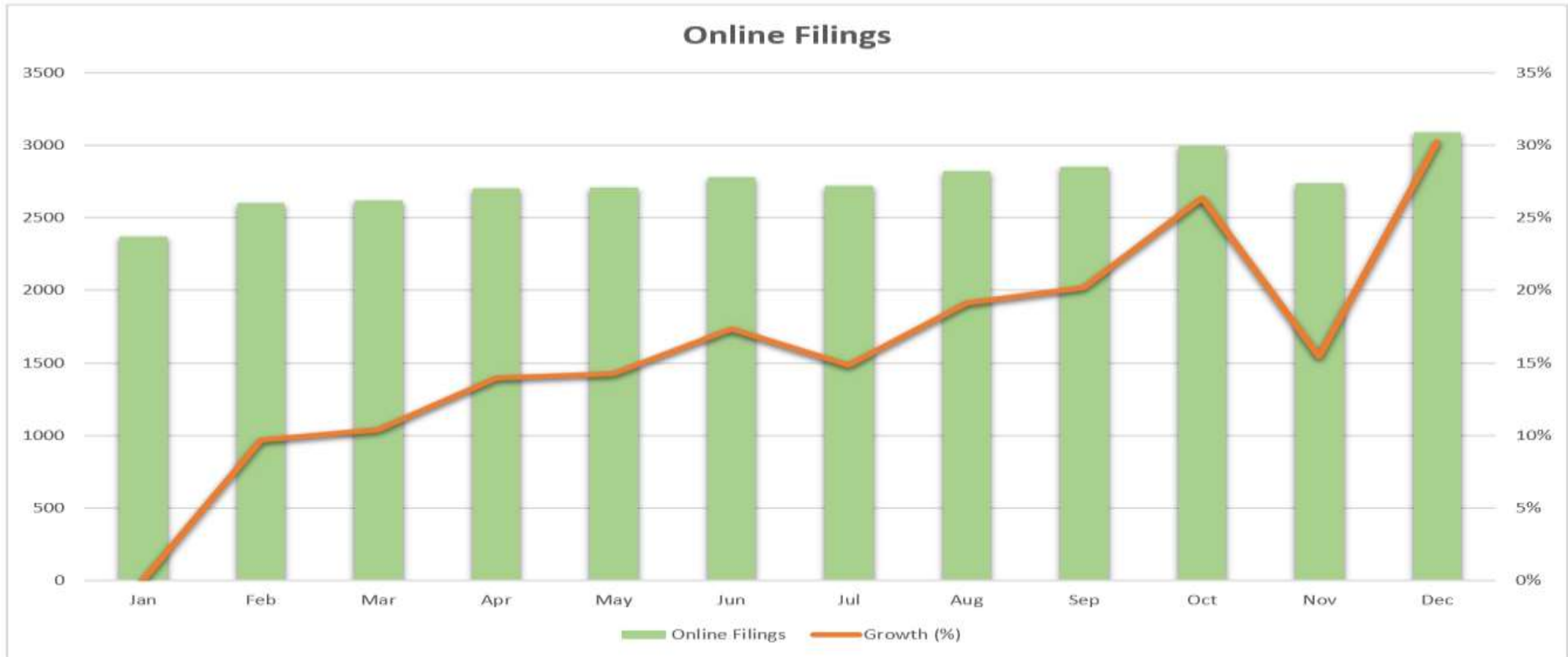
Goal # 1 – Increase online filings by 25% annually

- What measurements do we need to collect /available (raw data)?
- Data Source (Possible Data Measurements)
 - Number of Filings Completed
- Frequency
 - Daily, Monthly, Annually
- Chart
 - What chart best describes the progress towards the goal?

Goal #1 - Scorecard

	Goal 1	Goal 2	Goal 3
Example	Increase online filings by 25% annually		
Data Source	Number of Filings Completed		
Frequency	Monthly		
Chart	Line Graph		

Goal #1 - Dashboard



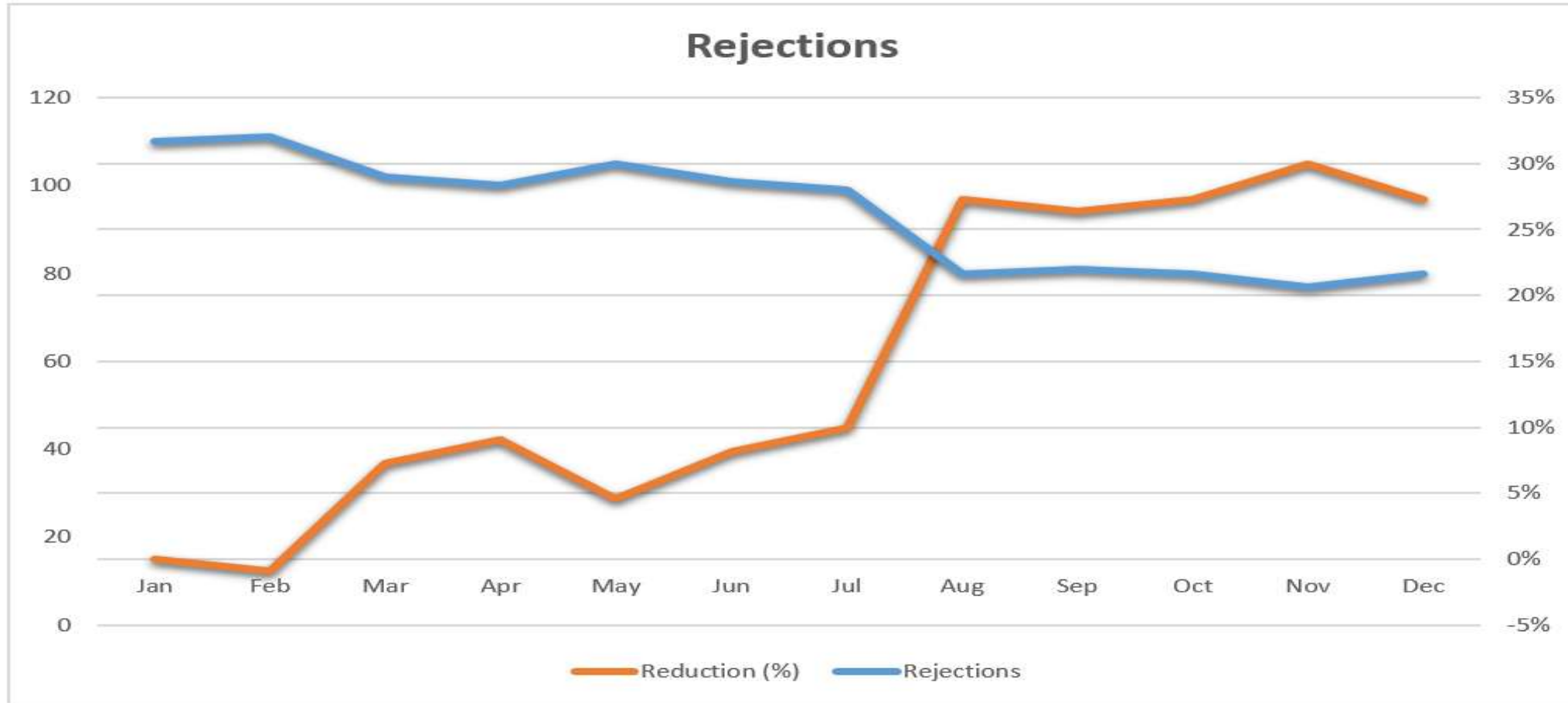
Goal # 2 – Reduce rejections by 15% (Accuracy)

- What measurements do we need to collect /available (raw data)?
- Data Source (Possible Data Measurements)
 - Number of rejected filings
- Frequency
 - Daily, Monthly, Annual
- Chart
 - What chart best describes the progress towards the goal?

Goal #2 - Scorecard

	Goal 1	Goal 2	Goal 3
Example		Reduce Rejections by 25% (Accuracy)	
Data Source		Number of Rejected Filings	
Frequency		Monthly	
Chart		Bar Graph	

Goal #2 - Dashboard



Goal # 3 – Increase staff productivity by 30 %

- What measurements do we need to collect /available (raw data)?
- Data Source (Possible Data Measurements)
 - User Completed Filings
 - Agency Completed Filings (Average)
- Frequency
 - Daily, Monthly, Annual
- Chart
 - What chart best describes the progress towards the goal?

Goal #3 - Scorecard

	Goal 1	Goal 2	Goal 3
Example			Increase staff productivity by 30 % (Velocity)
Data Source			User Completed Filings vs Agency Completed Filings (Average)
Frequency			Monthly
Chart			Line Graph



Goal #3 - Dashboard

STATE OF TENNESSEE * SECRETARY OF STATE

Division of Business Services

User Activity Summary Report - Business

As of May 26, 2016

Date Range Includes: 01/01/2016 through 03/31/2016

User Name	Filings	Filings Web Prep	Amend	Amend Web Prep	New ARs	ARs Web Prep	Other Filings	Other Filings Web Prep	Rejects	Total
	93	141	1,467	51	227	1,669	0	0	767	4,415
Totals:	93	141	1,467	51	227	1,669	0	0	767	4,415
Voids/Deletes Processed:	0	0	0	0	1	0	0	0	0	1

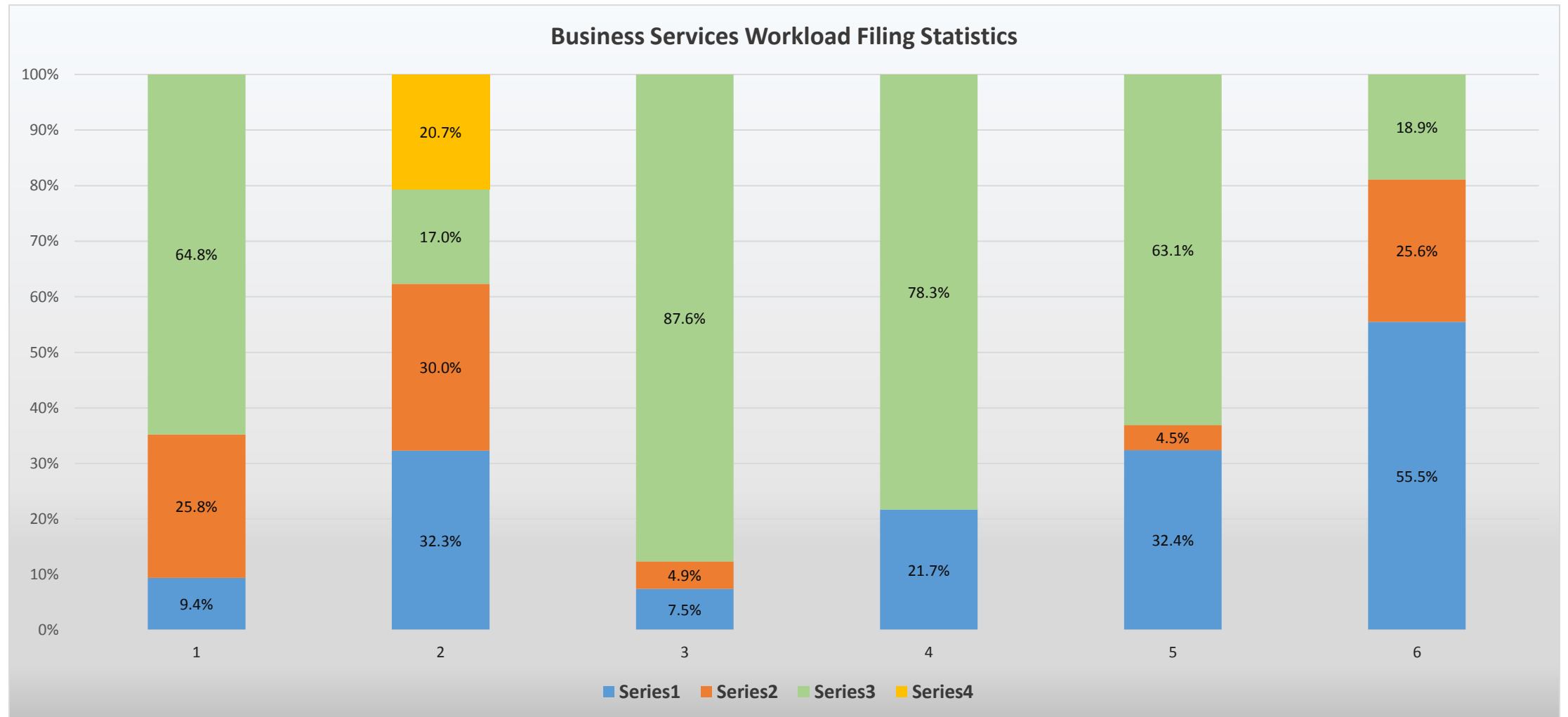
Key Benefits

- Agency Goals Defined/Organizational Objectives
- Improve Staff Efficiencies
- Reduce Workflow Bottlenecks
- Real-time Activity Monitoring-Intranet Dashboard
- Measurable Results

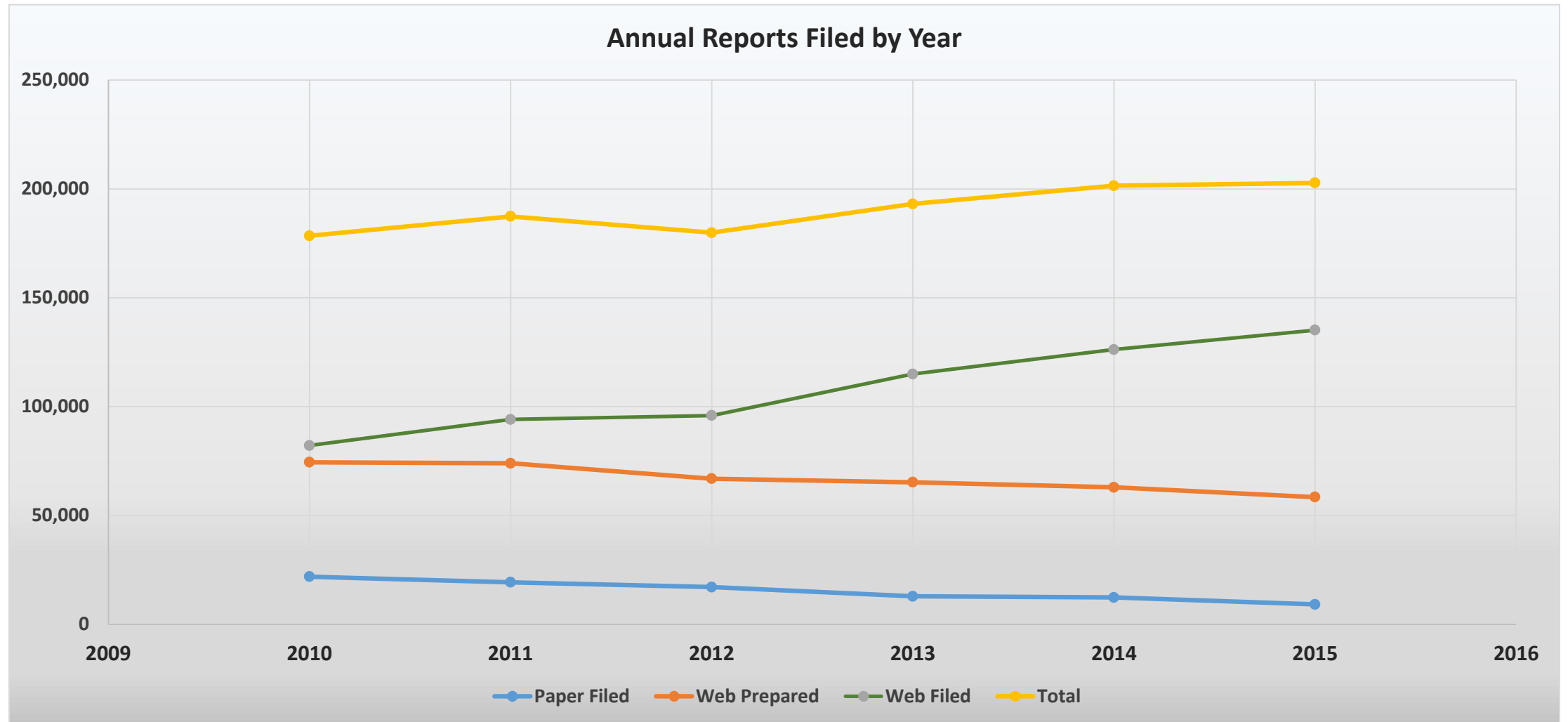
Case Study – Tennessee Secretary of State

- 2015 Workload Statistics
- Annual Report Volume
- Web Filed Top 8
- Sessions by Device Category
- Sessions by Country
- Page Views
- Sessions by Browser

Case Study – 2015 Workload Statistics



Case Study – Annual Report Volume



Case Study – Web Filed Top 7 (Q4-2015)

Document / Filing Type	Count
Annual Report - Limited Liability Company	58,665
Annual Report - For-profit Corporation	53,600
Annual Report - Nonprofit Corporation	22,732
Certificate of Existence/Authorization	18,097
Motor Vehicle Temporary Lien Application	16,910
UCC Financing Statement (UCC1)	15,431
New Business Filing - Limited Liability Company	13,295

Case Study – Sessions by Country (Q4-2015)

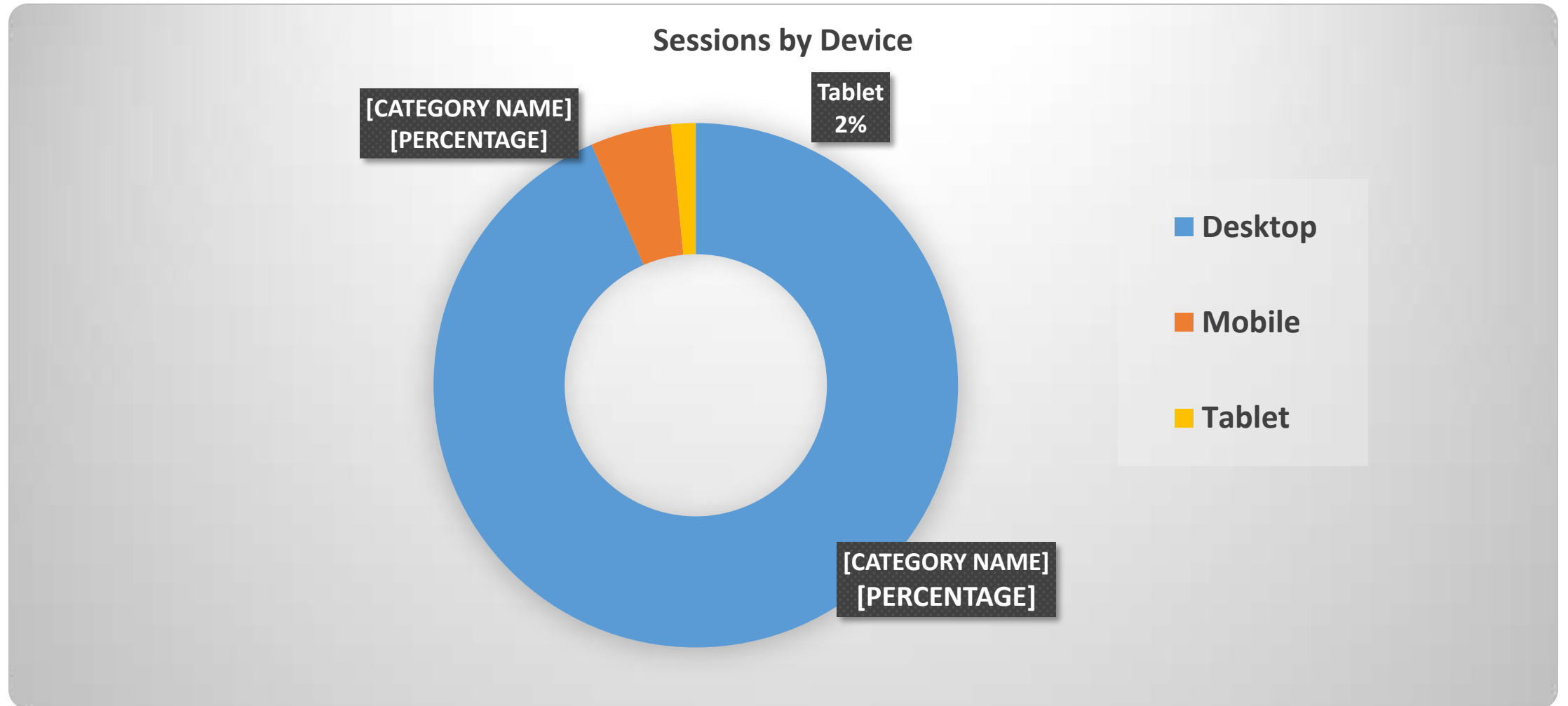
Country	Sessions
United States	437,770
India	9,889
Philippines	7,193
United Kingdom	2,951
Canada	1,103
Germany	979
(Not Set in Browser)	844
Netherlands	563
Hong Kong	281
Australia	210



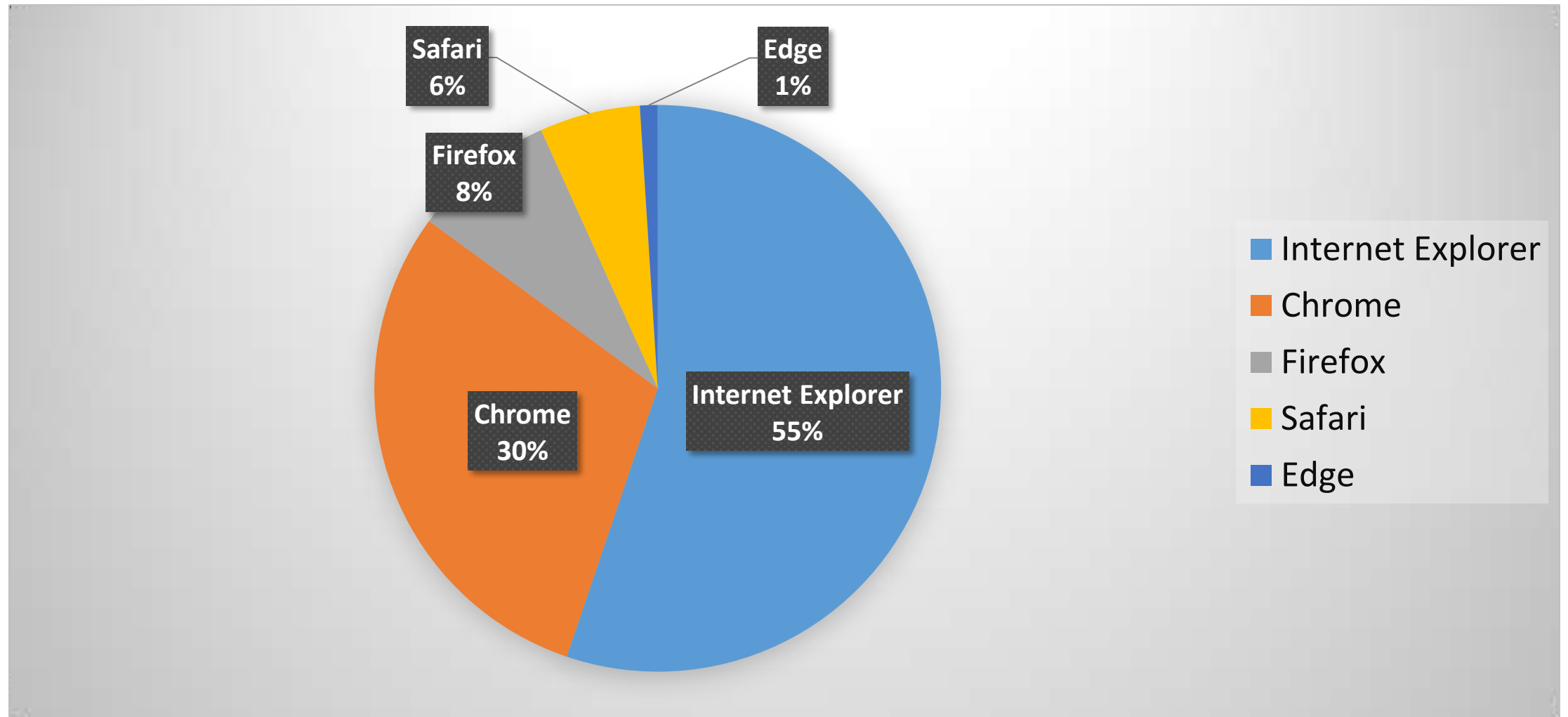
Case Study – Page Views – Top 8 (Q4-2015)

Page	Views
Business Entity Search	1,341,725
UCC Search	106,676
Business Services Home	58,261
Name Availability Search	56,156
Worker's Comp Exemption Registry Search	48,775
UCC Home	28,652
New Business Registration Instruction	27,131
New Business Registration Start	25,859

Case Study – Sessions by Device Category



Case Study – Sessions by Browser



Wrap-up

- Agency Staff Buy-in
- Define, Architect, and Implement
- KPI/Metrics Considerations
- Continual Process Improvement

Questions & Answers

Additional Possible Performance Indicators

- Backlog
 - Unprocessed Images
 - Number of items in work queue by category
- User Statistics
 - Velocity
 - Number of Filings processed by day / hour
 - Number of Filings by document type
 - Processing time (Start to Finish)
 - Accuracy Percent
 - Number of Filings – Voids / Number Filings
- Economic data
 - Trending – new filings by filing type over time
 - Which months are hot months for new business registrations?
 - Pull data by county/city, which ones have growth