

Measures of Success Plan



What does success look like?

Level 1 – Are people using the system?

Usage Metrics:

*Examples: # Logins
Cases Entered
Users Trained?
users engaged on a case*

Level 2 – Are people using the system correctly?

Data Quality & Completeness Metrics:

*Examples: X% of Cases Closed on time
X% of Cases*

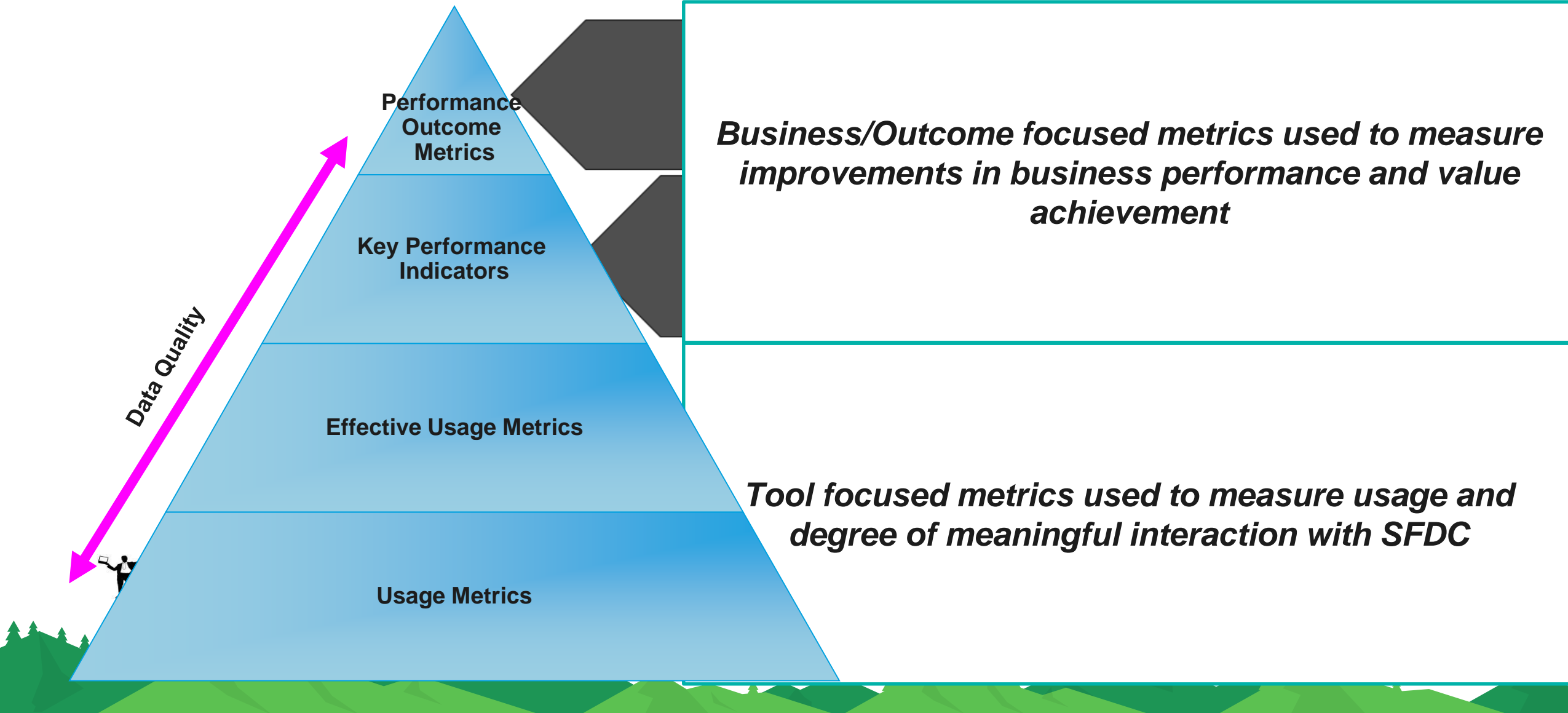
Level 3- Is the Business Value being realized?

Business Performance Metrics:

*Save X hours due reduced/eliminated data calls
Responded back to Congressional cases X% faster (or percentage on time)*

Example Metrics Distinction

EXAMPLE



Ensuring the proper use of the tool

Adoption Metric Assessment

EXAMPLE

Identifying the Right L1, L2 & L3 Metrics : Consider the following key questions for defining the appropriate adoption metrics at each level...

Level 1: Usage Metrics



- What is the organization's most fundamental definition of adoption?
- At a minimum, what activities would an individual need to complete consistently in Salesforce to be considered a user that has adopted the system?
- How crucial is mobile usage / adoption to the success of the implementation?

Level 2: Data Quality & Completeness Metrics



- Which actions in Salesforce demonstrate whether users are / are not following new processes? (*i.e., is Salesforce phasing out old ways of working?*)
- Which behaviors and/or processes do you anticipate users may resist or have more difficulty adopting? Which KPI(s) would expose those potential barriers to adoption?

Level 3: Business Performance Metrics



- Which business objectives need to be satisfied for the project to be considered a success?
- Which leading / incremental KPIs provide an indication of whether progress is being made against high-level performance targets?

SAMPLE - Adoption Metrics Scorecard

EXAMPLE

| Category | Metrics | As-Is | Target | Business Objectives |
|---|---|---|---|---|
| Usage Metrics Basic indicators of success | <ul style="list-style-type: none"> % Trained Users (tracked manually by trainers) Users logged in – last 7 days Users not logged in by last name – last 7 days This Week's Overall Login % Users never logged in Salesforce1 Login % by role, this week Overall Salesforce1 Logins Today Top Salesforce1 Users (# of days logged in), last 30 days Opportunities created by owner role – last 30 days Calls logged – last 30 days Contacts created by owner role – last 120 days | <ul style="list-style-type: none"> _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ | <ul style="list-style-type: none"> _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ | <ul style="list-style-type: none"> Drive user adoption through ease of use |
| Data Quality Metrics Critical to data integrity and reliability | <ul style="list-style-type: none"> Contacts without key field(s) populated, current and previous month (phone #, email address) Neglected Opportunities by role, last 60 days (> 30 days last modified) Open Opportunities with a close date in the past Key, non-required opportunity record fields filled out, current and previous month (Main Competitor, At Risk Opportunity, Customer Problems/Needs) Top 5 users with the most activities (calls) logged, last 30 days ("Activities Wall of Fame") Customer accounts with "log a call" activities documented with record types equal to Truck and Aftermarket (to measure cross-BU collaboration) | <ul style="list-style-type: none"> _____ _____ _____ _____ _____ _____ | <ul style="list-style-type: none"> _____ _____ _____ _____ _____ _____ | <ul style="list-style-type: none"> Improve Data Quality Drive Reporting, Pipeline Accuracy |
| Business Performance Metrics Reflect progress against overall business objectives | <ul style="list-style-type: none"> Opportunities Closed – Lost, by reason, current and previous FQ Win rate (%) by customer tier <i>Opportunity Stage Duration, current and previous FQ</i> <i>Sales revenue, current and previous FQ</i> <i>Pipeline by owner or owner role, current and next FQ</i> | <ul style="list-style-type: none"> _____ _____ _____ _____ _____ | <ul style="list-style-type: none"> _____ _____ _____ _____ _____ | <ul style="list-style-type: none"> Increase Sales Productivity Drive Pipeline Growth Metrics in grey to be tracked 2+ months after Go Live |

SAMPLE - Adoption Dashboards

Adoption Dashboards provide valuable, real-time insight into how consistently and effectively users are leveraging Salesforce in their day-to-day work.

| Category | Metrics | As-Is | Target | Overall Business Objectives |
|---|---|---|---|--|
| Usage Metrics <i>Basic indicators of success</i> | <ul style="list-style-type: none">% Trained UsersUsers logged in – last 7 daysUsers not logged in by last name – last 7 daysContact records created by owner role – last 120 daysOpportunities created by owner role – last 60 daysActivities completed – last 60 daysAccounts last modified by owner – last 120 daysMobile Adoption % | <ul style="list-style-type: none">________________________________________ | <ul style="list-style-type: none">________________________________________ | <ul style="list-style-type: none">Drive user adoption through ease of use |
| Data Quality & Completeness Metrics <i>Critical to data integrity and reliability</i> | <ul style="list-style-type: none">Customer Records with all key fields populatedKey, non-required fields filled out on Customer RecordsOpportunities with a Close Date in the past, Last 60 daysStage opportunities are entered, current and previous FQLead Rating on Converted Leads, Current and Previous FQ | <ul style="list-style-type: none">_________________________ | <ul style="list-style-type: none">_________________________ | <ul style="list-style-type: none">Improve Data QualityDrive Reporting, Pipeline Accuracy |
| Business Performance Metrics <i>Reflect business performance and process compliance</i> | <ul style="list-style-type: none">% Customer-facing time per AgentForecast Accuracy (%)Average Agent time spent on admin tasksPipeline Growth (%)Win Ratio, Current FY or Current and Previous FYOpen Leads by Owner Role, Open-Not ContactedNew Agent onboarding time | <ul style="list-style-type: none">___________________________________ | <ul style="list-style-type: none">___________________________________ | <ul style="list-style-type: none">Increase Agent ProductivityDrive Pipeline GrowthAccelerate New Hire Onboarding |



- Once defined, adoption metrics are summarized in an adoption scorecard(s), then loaded into a custom Adoption Dashboard(s)

- The Adoption Dashboard provides a means for real-time tracking and reporting to drive proactive management of user adoption