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# Metrics: What They Are and Why They Matter

## Introduction

There's no doubt that metrics can be useful in your efforts to improve Web self-service. The trick comes in knowing *what* to measure and *when* in order to reveal significant trends. This white paper attempts to take the mystery out of measurement by describing a variety of metrics along with pointers on how to use them. All of the suggestions detailed here draw on knowledge acquired by professionals using Oracle Knowledge for Web Self Service to build best-practices customer support operations.

Keep in mind that many more measurements exist than are listed here, and many more measurements are listed here than you should actually track. Your measurements will depend on your business, and they'll change as your organization matures.

## Executive Metrics

The high-level metrics tracked by executives provide insight into how the business and the company Website are performing. These common key performance indicators include the following:

- Revenue (or margin) dollars per case
- Unique/total Web visitors
- Total Web visits
- Estimated Web success rate
- Cases opened per product/version in relation to number of active licenses
- Defects per product/version
- Percent Web success, based on external survey results
- Number of escalations to the executive level

## Control Expectations

One of the chief reasons executive metrics exist is to demonstrate the return on investment yielded by process improvement investments. Be careful what you reap, however, because often these improvements come with the expectation that resources will be reduced correspondingly. Be sure to point out what your team is doing with the additional bandwidth gleaned through process improvement. And be aware that your true savings may come in the form of delayed hiring as opposed to reduced headcount.

## Let Customer Satisfaction and Loyalty Drive Process Improvement

Investing in process changes that don't lead to changes in your metrics does nothing to help your credibility. What *will* help your credibility is tying specific changes to marked improvements in the metrics—likely making the next round of changes easier to justify and fund.

The bottom-line driver for all of your process improvements should be increased customer satisfaction and loyalty. Think about it this way: by deflecting customer issues more efficiently, you're likely to bring your costs down. However, if short-term cost reduction is your motivation, you're unlikely to make the investments necessary to achieve that goal while also increasing customer satisfaction. In contrast, by focusing on customer satisfaction, you should see revenue per case, unique visitors, total Web visits, and Web success rates improve over time. You should also see a corresponding reduction in the number of cases and defects per product/version.

## Log Key Events

To obtain a direct correlation between changes and results, it's also helpful to keep a log of key event dates (for example, when the knowledgebase went live, when a new release went out, or when your search engine was updated). With such a log in place, you can then map those changes to the charts and get a direct correlation between changes and results.

## Survey for Success

Estimating Web success can be tricky. Attempting to get customers to click a button at the bottom of an article to tell you whether it solved their problem is likely to yield a click rate of about .02 percent—not very helpful. You can also look at traffic flow. A customer coming to your Website, doing a search, viewing an article, and then leaving would be viewed as a success. In contrast, a customer completing those same actions but concluding by opening a case would be viewed as a failure.

The team of professionals experienced with Oracle Knowledge for Contact Center and Oracle Knowledge for Web Self Service measured Web success primarily via system surveys. In these surveys, each customer who logged into the Website was considered a touch. All were contacted via e-mail with a request to take a brief Web-based survey. This survey asked customers why they came to the Website, whether they found what they were looking for, whether they liked the way the Website worked, and—most importantly—if they *had not* found what they were looking for, where did they eventually find it. These surveys yielded a 15 percent response rate—high enough for the team to come up with some conclusions about why customers came to the Website and their success in achieving their objectives.

Be careful, however, in the conclusions you draw from your measurements. For example, if your customers report finding the right answers to their questions 75 percent of the time, this does not mean you have 75 percent case deflection. The reason? Customers ask many more questions via the Web than they would in opening cases over the phone.

Be sure you filter your surveys so as to only allow one per month or quarter. Customers weary of surveys and will ignore them if they receive too many.

## Operational Metrics

Some examples of operational metrics include the following:

- Web abandon rate
- Percent new issues versus known issues
- Web questions asked (total and per unique visitor)
- Web visits (total and per unique visitor)
- Web articles viewed

- Percent workload via Web/phone/e-mail
- Quality outcome (solution quality, customer satisfaction, Web feedback)
- Contract renewal rates

When you need to determine what impact changes have had on processes and infrastructure, operational metrics are in order. Use them to help prioritize your next area of focus by uncovering the trends that will show the effect of changes.

### Track Your Web Abandon Rate

Your Web *abandon rate* is the number of customers who've visited your Website and left without taking action. You can use metrics to determine how many customers asked questions but did not view articles; how many visitors reached your registration page but did not complete the process; and more. By tracking abandon rates, you can determine which areas of your Website are confusing visitors or offering nothing of value, and then take action to improve them.

Once you detect an abandon rate that exceeds appropriate levels, you can next set up live alerts that inform you when a visitor has entered too many clicks or spent too much time browsing a page. By offering such users a live chat session before they abandon your Website, you can save them time and retain a customer.

### Understand New Issues Versus Known Issues

By comparing the number of new issues versus known issues, you can learn much about how easy or difficult it is to access and find answers within your Website content. An issue is defined as *new* if no previous knowledge—published or unpublished—exists to address the issue. In contrast, an issue is defined as *known* if knowledge exists—whether in published or unpublished form—to address the question. The goal is to have as low a percentage of known issues as is practical. Some of the things preventing users from finding answers to known issues include the following:

- No *published* information
- Failed search
- Difficult-to-decipher search results (making it easier to open a case)
- The ability to open cases without an initial search

Tracking the number of known issues handled by agents and then investigating why visitors have been unable to get answers to those questions will be key in your efforts to continuously improve processes.

## Team Metrics

Team metrics include the following:

- Knowledge participation (including articles published per agent/team and articles viewed per agent/team)
- Cases opened per agent/team
- Cases closed per agent/team
- Case backlog per agent/team
- Resolution time

The following provide some general guidelines for dealing with team metrics:

- **Be careful which metrics you share or represent as a measure of value.** Measurements that have perceived value modify behavior and can often be manipulated.
- **Take all measurements into account in determining a team member's value or performance.** Some employees may pick up more cases, while others may create more knowledge articles. And some employees may be good at interfacing with customers but not so great at analysis and troubleshooting, and vice versa. This is why it's important to consider all metrics when evaluating employee performance.
- **Assign equal values to all metrics *unless* you're looking to improve team behavior in a specific area.** For example, if phone response is faster than Web response—and you want that to change—place an emphasis on the Web response measurement. Publish it as the rewarded behavior. Then acknowledge teams that close or reverse the gaps. Once you've achieved your desired results, you can move on to the next priority change.
- **Don't be afraid to change your measurements as your organization matures.** For example, when you start down the knowledge reuse path, you may want to measure and reward knowledge creation. In the long term, however, this is not the result you're looking for. Instead you want customers to read the articles and decline from opening cases. Thus, you *start* by measuring knowledge creation and eventually shift to measuring customer views—the higher-value measurement.

## More Metrics

Some of the more difficult things to measure—although helpful if you can figure out how—include the following:

- Number of visitors performing a search and then opening a case
- Number of cases “closed in one”

- Number of “how to” questions
- Cases/Web questions per visitor/company

The number of visitors who perform a search and then open a case provides a metric for Web self-help failure (although first you need to determine whether the case opened is new or known). If this metric increases over time, you need to evaluate your rate of knowledge creation/refresh. If it decreases over time, you’re likely on the right track.

Of course, you can’t look at just one metric and see the whole picture. If the case-opened metric is going down but so are your visitor numbers and questions asked, you might be experiencing a much bigger problem: loss of customers.

*Closed in one* refers to issues resolved during the course of the first customer contact—generally basic questions and easy-to-resolve issues. Such cases are generally easily addressed in the self-help knowledge-centric environment. As such, they also serve as good indicators of knowledge that’s missing from your system. By tracking these issues and creating knowledge to address each of them, you can increase Web success rates and lower both closed-in-one rates and overall caseload. A high closed-in-one rate can also be an indicator of Web process failure.

In contrast, a large number of *how to* questions can be an indication of poorly trained customers or support personnel. Companies often hire employees and then fail to train them. Tracking *how to* questions can help you identify these people faster so that you can get them trained and help them realize increased value sooner. Using *how to* questions to create training sales leads could also increase your training revenue while lowering your support workload.

Cases/Web questions per visitor/company can help you identify customers that are going through upgrades, experiencing changes in personnel, or altering processes. Thus, a report identifying your top five visitors/companies asking questions/opening cases can help you be more proactive in reaching out to them to see what assistance you can provide.

## Conclusion

To provide the Web self-service experience your customers demand, you need to constantly measure that experience. However, what you measure—and how you use those metrics—will be determined by the goals your organization has set for itself as well as what customers want from you. By measuring carefully and making the appropriate adjustments (and carefully controlling the flow of that information), you can improve processes, increase customer satisfaction, and get a faster return on your customer relationship management investments.



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