

## ***Customer Service Sustainability Technology Dashboard System*** *Sustainability tool, 24/7 Metrics Measurement, Accountability and Alignment*

### **Mission/Purpose (Objective)**

To help organizations measure, manage and communicate faster and better. Companies have saved millions of dollars, better aligned their resources and vastly improved customer service by using these methodologies and software to determine and manage the important measures of success for their organization. Once these measures of success (metrics) are determined, they are entered into our dashboard and scorecard software so that all levels of the organization are aligned to measure, manage and communicate better and faster.

There is no better tool than scorecard / dashboard software to focus an organization on the important strategic goals and related measures of success that management has set forth.

### **Business Challenge**

Organizations need to align their most valuable resources with their mission statement. Finding a means of connecting the entire organization so that it can effectively establish, communicate and measure prioritized goals is a huge challenge.

### **Description of Marketing Offering**

This is a self sustaining system with no additional people are needed for the software to function perfectly. The software is a client server system utilizing a windows based platform. The back-end server uses an SQL database made user friendly by a front-end client written in visual basic. The system does not require a dedicated SQL server. Any existing SQL server can host the database. Anyone in the organization with access to the SQL server across a network can utilize the software.

The Dashboard and scorecard software can be purchased as a single copy license price (100 per customer license) including user training: 2 days, up to 20 people per class at customer's location, using customer computers and System Administrator training: 2 days if necessary, up to 5 people. Maintenance, help desk, upgrades and provided for each license the first year. Upgrades and renewals after the first year are provided at the discretion of the client.

If a second database is necessary for a separate legal entity at a separate physical location, but both purchasing entities are owned by the same parent, the second license price and training are significantly reduced.

### **Process of Marketing Offering**

#### **Alignment, Prioritization, and Improvement**

Targets for metrics such as desired levels of service, cycle times, response rates, and financial plans are goals that are entered into the software and assigned to the responsible people. Each metric is connected to a strategic goal. Instantly, all levels of the organization are aligned with what is important.

The software is accessible to every member of the organization, realtime, and every one with assigned rights can be using the software at the same time. As actual data and variance analysis or explanations are entered or imported, the information becomes instantly available throughout the organization. Instant data, instant communication, instant knowledge, instant competitive advantage.

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Management can see trends, variances, and relationships by viewing standard or customized dashboards and scorecards with a few clicks of the mouse. Problems are discovered and corrected earlier than they ever could be before. The ability for senior management to ask questions within the software to the people responsible for metrics turns the software into the organization's knowledgebase and communication hub for what is important.

## Client Testimonials

"The TriMetrics Dashboard is a core component in the transformation of our organization, allowing us to measure and communicate the right things. Everyone is now connected to the important issues."

*Tom McAteer, President and CEO, Vytra Health Plans.*

"TriMetrics has been instrumental in affecting a culture change here at Bethpage, by aligning the strategic goals of the credit union with the key performance indicators of the individual business units. As a result, the entire credit union is more performance oriented, and focused on our core goals."

*Francis Toomey, Assistant Vice President of Business Analysis Bethpage Federal Credit Union*

- A health care organization increased member loyalty and satisfaction scores by rerouting member's telephone calls to lines with lower volume based on data in our software. Speed of answer time and abandonment rates improved.

- A health care organization reduced pharmacy costs by millions of dollars by measuring and managing process cycle time metrics in our software.

- A financial institution increased customer satisfaction levels by using our software to manage and redeploy resources at various branches based on daily activity.

Some of the metrics used by various clients: Member loyalty scores, retention rates, cycle times, phone abandonment rate, phone answer time, mystery shop scores, member wait times, revenue per employee, and hundreds more.