Discovery of Customer-Centered Metrics through UX and Data Science Collaboration

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Outline

DO YOU NEED NEW
METRICS?

HOLDING A METRICS
WORKSHOP

CONNECTING AND USING
THE NEW METRICS

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DO YOU NEED NEW METRICS?

Business Metrics are Not Always Customer-Centered

Survey led measures do not scale up to required larger volumes

Restrained by response rates and sampling error (among others)

Some **specialised metrics** define success narrowly

Success restricted to interaction with only part of the product

Frequency based KPIs are generally disconnected from user actions

Customer success defined by usage—not by task completion

Financial metrics are mostly lagging indicators

May prioritize actions not valued by customers for financial wins

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Critical Attributes of Customer-Centered Metrics

For product metrics to be customer-centered, they must:

- ✓ **Drive Action**
- ✓ **Be Interconnected with Customer Goals**
- ✓ **Possess Predictive Capability**
- ✓ **Direct Innovation**

HOLDING A METRICS WORKSHOP

Metrics Workshop Approach

Identify Use Cases

- E.g., Sign-in→ Search → Document view → Document delivery

Define Key Actions

- E.g., Sessions | Searches | Document views | Document deliveries | Document engagement | Filtering

Develop Key Ratios

- Document views/Searches
- Document Engagement/Document views
- Document Deliveries/ Document Engagement

Collaboratively Defining Customer Success

UX team

Insights

Sales

Data team

Others

Product

SMEs

Discover and Define Customer Success

Cross-Group Workshop

Customer-Centred Metrics

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Sample Workshop Agenda

- **Introduction** **(10 min)**

- **Background & Review** **(25 min)**
  - A quick tour of workshop tools (e.g., Miro) (10 min)
  - Discuss product use cases/customer goals (15 min)

- **Group Exercise** **(80 min)**
  - Introduce main phases/steps (10 min)
  - Actions indicating customer success (15 min)
  - Actions indicating customer efforts (15 min)
  - Metric proposals by all (25 min)
  - Voting and tabulation of metrics (15 min)

- **Wrap up** **(5 min)**

What Makes a Customer-Centred Metric

Maximize success while Minimizing effort

> Similar to ROI where *Return = Profit/Investment*
> Customer success = *Success action/Effort action*

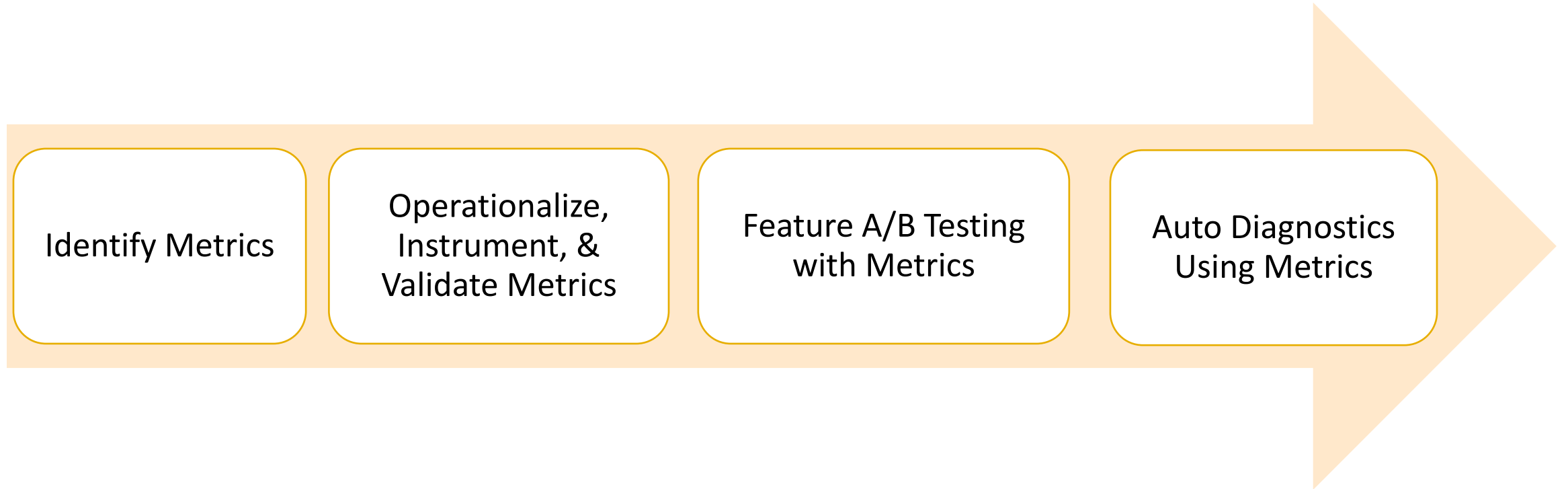| Success Actions (Maximize)	Effort Actions (Minimize)
Deliveries (print, email, download)	Searches
Document Views	Filter actions
Work folders	Clicks
Clicks on Citations	Page Views
Table of Content	Document Scrolls
Highlighting (Review Actions)	Rank

Maximize Numerator

Minimize Denominator

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LexisNexis Workshop Output

Most Voted Measures	Number of Votes
Dwell-time per Session Duration	12
Engaged Docs per Doc View	10
Engaged Docs per Search	9
Deliveries per Search	11
Deliveries per Doc View	13
Engaged Doc within 60s	10
Doc Views per Search	8
Searches before Engagement	9
Rank of Engaged Documents	12

CONNECTING AND USING THE NEW METRICS

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Progression of Customer-Centered Metrics

Identify Metrics → Operationalize, Instrument, & Validate Metrics → Feature A/B Testing with Metrics → Auto Diagnostics Using Metrics

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Operationalize, Instrument, & Validate

Determine how the actions can be defined within your analytics

Instrument new metrics and collect data

Look for associations between *customer-centered* metrics and *business* metrics

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Validation Example: LexisNexis

➢ The customer-centered metrics were predictive of the four largest business metrics
➢ If we want to improve the business metrics, we can be guided by the customer-centered metrics

Customer-Centered Metric	AED	PSS	DCG	Net POS
Dwell-time per Session Duration			✔	
Engaged Docs per Doc View			✔	✔
Engaged Docs per Search			✔	✔
Deliveries per Search	✔	✔		✔
Deliveries per Doc View	✔	✔		
Engaged Doc within 60s		✔		
Doc Views per Search	✔		✔	
Searches before Engagement		✔		
Rank of Engaged Documents	✔			✔

Use New Metrics to Drive Business Success

❑ **Feature A/B Testing**
  ❑ Use customer-centered metrics as success metrics for relevant A/B tests

❑ **Drive product efforts with customer-centered metrics to achieve business success**
  ❑ Successful customers = Successful business

❑ **Track metrics and monitor as a measure of the user experience (UX)**

❑ **Periodically, re-assess customer-centered metrics**
  ❑ As the product or customers might change, ensure metrics are still appropriate

❑ **Develop models to predict the impact of product changes on customer success**
  ❑ Predictive auto diagnostics

Thank you.

Questions and comments welcomed.

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