THE NEW SCORECARD

ANTONIO ESTERRICH

Project Manager

PROJECT OVERVIEW

BACKGROUND

Capital Consortia has used a scorecard for years to evaluate staff success and ensure good performance communications are happening on a routine basis outside of a formal performance evaluation.

Dane County developed a tool using local IT resources so the results could be tabulated and shared across county IT platforms. While the concept of the scorecard worked well for several years, the system was hampered by a lack of IT resources to keep the functionality flexible and functional.

Also, during the COVID pandemic, the necessity of such an approach was negated as workload fell dramatically.

WHAT IS A PERFORMANCE SCORECARD?

- A performance scorecard is a graphical representation of the progress over time of some entity, such as an enterprise, an employee or a business unit, toward some specified goal or goals

- Performance scorecards are widely used in many industries throughout both the public and private sectors

ADVANTAGES OF USING A SCORECARD

- Goal Alignment
- Consistency
- Standardization
- Balanced approach to measure performance

THE SCORECARD IS NOT A DASHBOARD

Dashboard

- **Definition:**
  An Employee Performance Dashboard is an interactive visual tool that aggregates and displays key metrics and data related to employee performance within an organization. Key Features:
- **Real-Time Data:** Provides up-to-date information on employee activities and outcomes.
- **Visualization:** Uses graphs, charts, and tables for easy interpretation.
- **Customization:** Allows filtering and tailoring of data views based on role, department, or specific metrics.
- **Accessibility:** Typically web-based, enabling access from various devices.
- **Benchmarking:** Offers comparisons against goals, peers, or industry standards.

Scorecard

- **Definition:**
  An Employee Performance Scorecard is a strategic management tool that provides a comprehensive framework for evaluating employee performance in alignment with organizational goals. Key Components:
- **Objectives and Metrics:** Clearly defined targets and measurable KPIs (Key Performance Indicators).
- **Balanced View:** Focus on multiple dimensions such as skills, productivity, teamwork, and goal completion.
- **Feedback Loop:** Regular updates and feedback channels to align employee performance with organizational priorities.
- **Quantitative and Qualitative Data:** Includes numerical scores and qualitative evaluations.

AGENCY GOALS

- Ensure accountability for supervisors and the staff they manage to both praise high performers and problem solve with those who may be struggling or underperforming; and
- Embed a transparent culture of mutual ownership over the performance of the consortia as a whole between staff, all of our counties and leadership.

CONSISTENCY AND STANDARDIZATION

- Aims to eliminate subjective criteria whenever possible
- Performance is evaluated using measurable data
- Creates standard procedures to measure performance of individuals, units, and counties

MEASURES FIVE KEY PERFORMANCE INDICATORS

- On-Queue Percentage
- After-Call Work (ACW)
- Inbound Calls Answered
- Applications Processed
- Documents Processed

MAXIMIZING ON-QUEUE PERCENTAGE

Definition: On-queue percentage measures the time an ES worker is actively available to receive incoming calls.

Why It Matters:

Maximizing on-queue percentage is critical to ensuring that clients have timely access to services. A higher on-queue rate means more ES workers are readily available to assist callers, which directly reduces wait times and improves the client experience. It also supports operational goals such as meeting service level agreements (SLAs), promoting fair call distribution, and reducing call abandonment rates.

Performance Insight:

This metric can highlight trends in agent availability, identify disengagement or inefficiency, and serve as a benchmark for team performance.

MINIMIZING AFTER-CALL WORK (ACW)

Definition: After-call work refers to the time an ES worker spends completing tasks (e.g., processing documentation, and entering case comments) immediately after ending a call.

Why It Matters:

Minimizing ACW improves overall efficiency by enabling ES workers to return to the queue faster and handle more interactions throughout their shift. Excessive ACW can indicate issues such as inefficient workflows, lack of training, or system-related barriers. By tracking and managing this time, organizations can enhance productivity without sacrificing quality.

Performance Insight:

Monitoring ACW helps balance speed with accuracy, identifies training opportunities, and promotes effective time management.

TRACKING THE NUMBER OF INBOUND CALLS ANSWERED

Definition: This metric measures the total number of incoming calls handled by each ES worker during a given period.

Why It Matters:

Inbound call volume is a direct indicator of ES worker engagement and capacity. Tracking this number helps ensure fair workload distribution and identifies both high performers and those who may need additional support. It also enables data-driven staffing and scheduling decisions to align resources with call volume trends.

Performance Insight:

Call counts, when analyzed alongside quality assurance data (QC), offer a balanced view of both productivity and service quality.

TRACKING THE NUMBER OF APPLICATIONS ITEMS PROCESSED

Definition: This refers to the number of applications work items completed by the ES worker during reporting period (one quarter).

Why It Matters:

Applications is a core deliverable in the ES role. Tracking how many are processed ensures that service commitments (timeliness) are met and that applications are not delayed due to inefficiencies. It also provides a benchmark for expected performance and identifies training or workflow challenges that may be slowing down progress.

Performance Insight:

High or low application volumes can indicate case complexity, time management effectiveness, or opportunities to streamline the processes.

TRACKING THE NUMBER OF DOCUMENTS ITEMS PROCESSED

Definition: This refers to the number of documents work items completed by the ES worker during reporting period (one quarter).

Why It Matters:

Processing documents is a crucial step in verifying data and ensuring compliance. Tracking this number helps assess workload more comprehensively, as document handling can be time-intensive and requires close attention to detail. It also supports quality assurance and highlights potential backlogs or procedural inefficiencies.

Performance Insight:

A consistent document processing rate shows thoroughness and accuracy, while significant fluctuations may indicate case complexity or skill gaps that need to be addressed.

CRITERIA

Based on the recommendation from a cross department and cross county team, the following criteria will be implemented when selecting a color on the scale:

Blue: Exceeds Expectations - Exceptional performance; consistently surpasses expectations. >90%

Green: Meets Expectations - Solid, dependable performance. 70%-90%

Yellow: Satisfactory - Shows progress. 40%-70%

Orange: Underperforming - Needs guidance. 10%-40%

Red: Unsatisfactory - Needs management involvement, training, mentoring; improvement essential. <10%

Sample

Measuring Success with Statistical Tools

Curves (Normal Distribution):

Represents data distribution where most occurrences take place near the mean, creating a symmetrical bell-shaped curve.

Useful for visualizing performance and understanding where the majority of data points lie within a process.

Mean:

The average value of a dataset. It's central to determining overall performance within the process.

A change in the mean can suggest improvements or declines in a process.

MEASURING SUCCESS WITH STATISTICAL TOOLS

Standard Deviation:

Measures data variability from the mean. A decrease suggests more consistent performance.

Using bell curves can visualize data spread; aiming for a narrower curve indicates improved consistency.

Percentiles:

Divides data into 100 equal parts; useful for benchmarking.

Allows for comparison of individual data points against the overall dataset.

Helps identify outliers or areas needing improvement.

WAYS TO JUDGE “HIGH STANDARD DEVIATION (MOST USEFUL IN OPERATIONS)

Compare SD to the mean (Coefficient of Variation, CV)

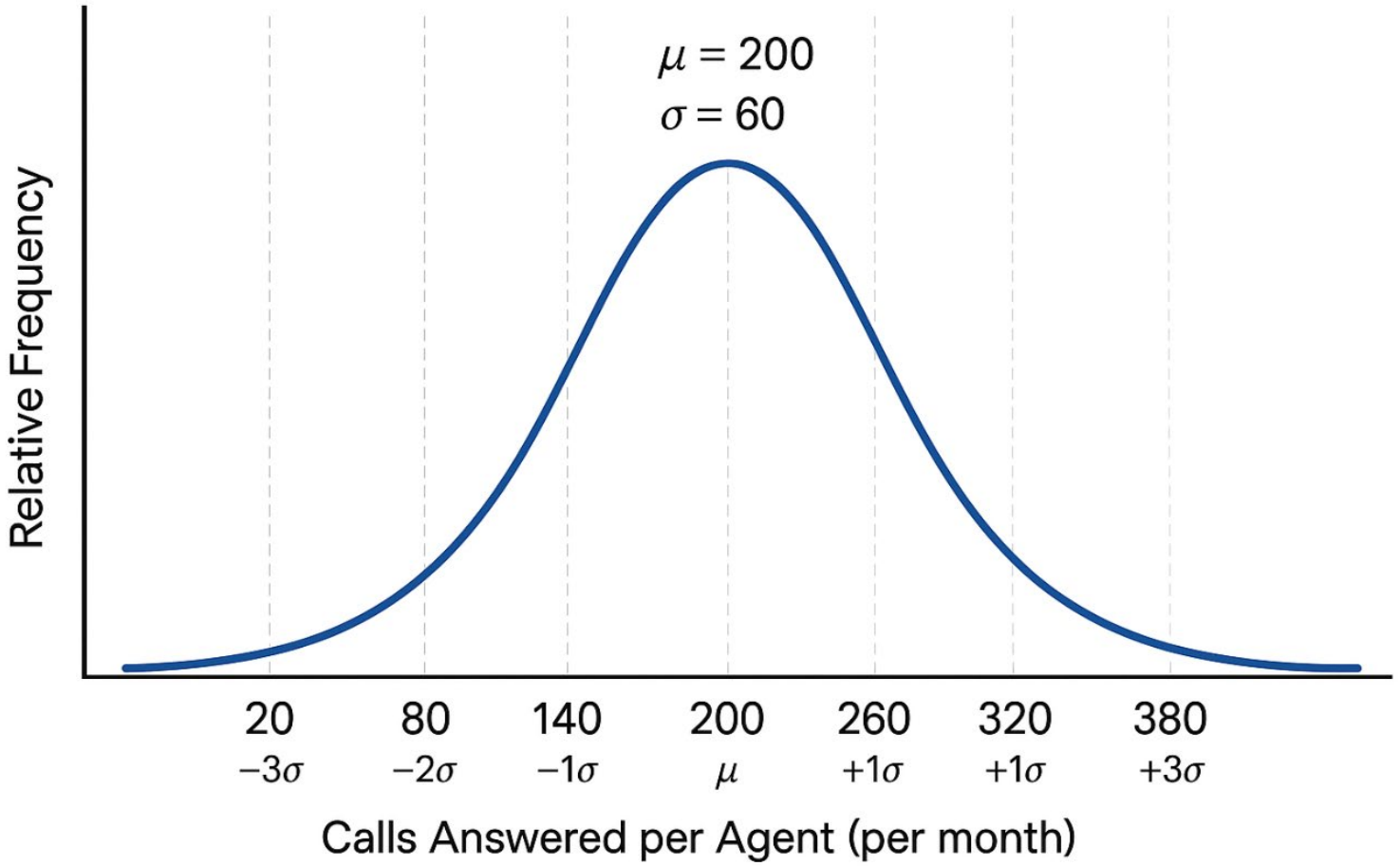
Use **CV = (standard deviation ÷ mean)** to normalize for scale.

Common operational interpretation (rule-of-thumb):

- **CV < 10%**: low variability (fairly consistent)
- **10%–20%**: moderate variability
- **20%–30%**: high variability (often operationally meaningful)
- **> 30%**: very high variability (expect inconsistent performance; investigate drivers)

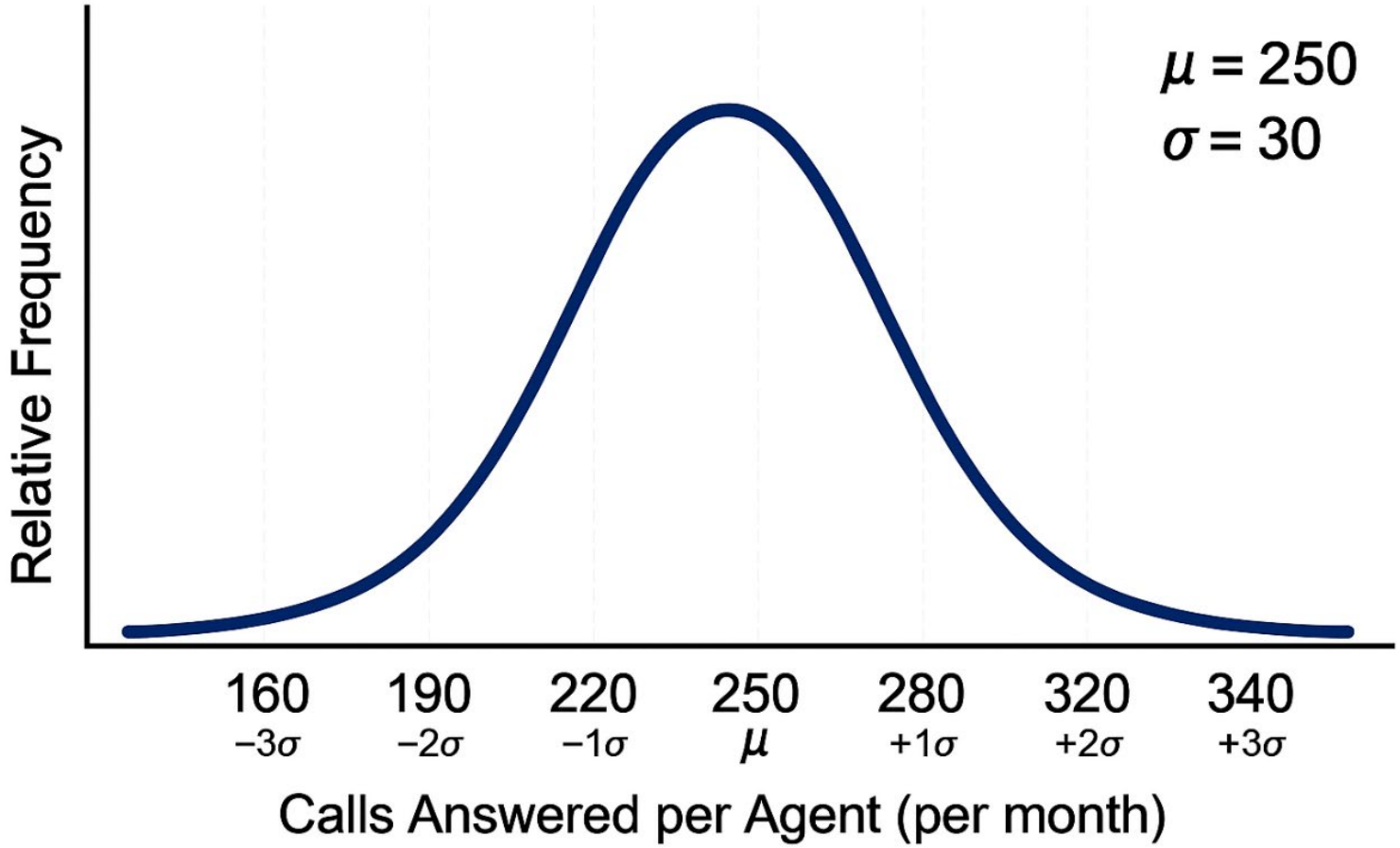
LARGE STANDARD DEVIATION, EXAMPLE

- **~68% of workers: 140–260** calls answered
- **~95% of workers: 80–320** calls answered
- **~99.7% of workers: 20–380** calls answered
- **CV=30%**



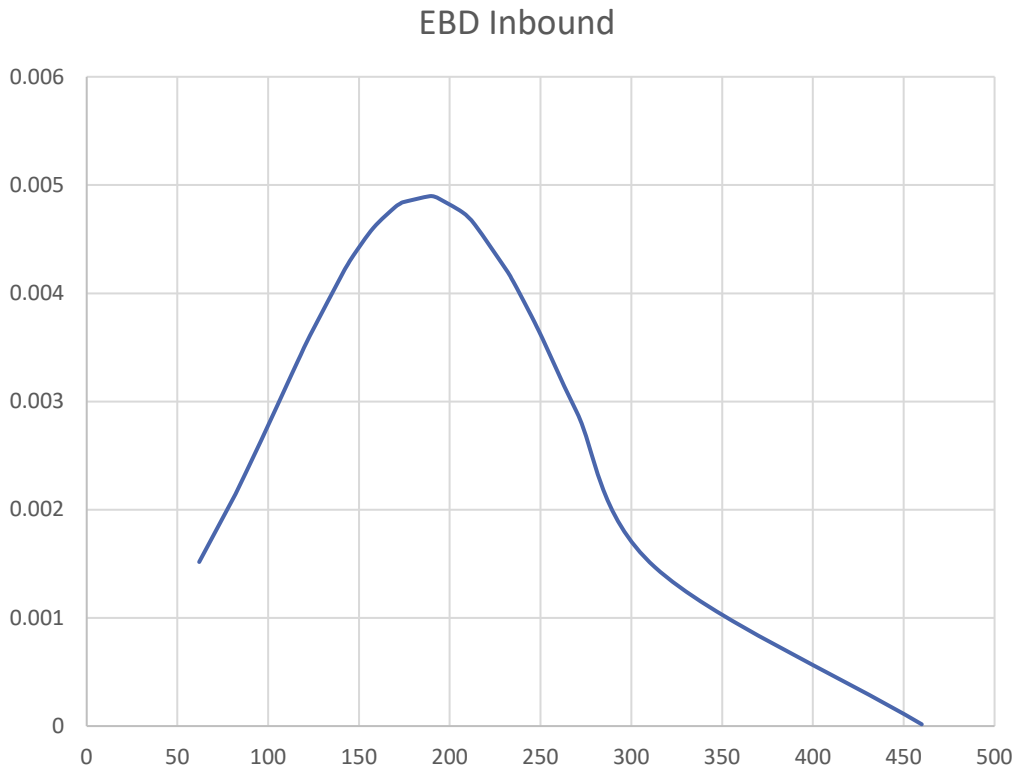
SMALLER STANDARD DEVIATION

- **~68% of workers: 220–280** calls answered
- **~95% of workers: 190–320** calls answered
- **~99.7% of workers: 160–340** calls answered
- **CV=12%**

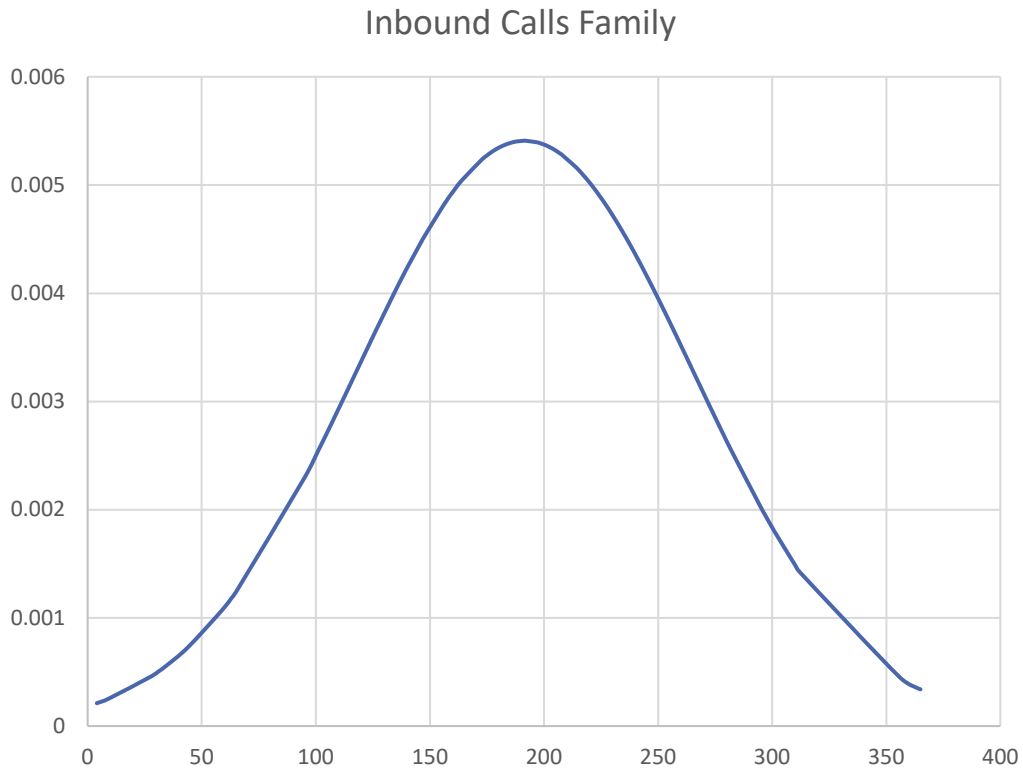


JANUARY RESULTS FOR INBOUND CALLS

Mean=186.66 SD=81.42 CV=43.62%



Mean=191.59 SD=73.75 CV=38.49



DATA SOURCES

We will be gathering Data on quarterly basis from:

- Analytics for Cares
- Genesys

NO SURPRISES

You will receive a monthly email with your scorecard numbers, percentile, and the color associated with your results. January's numbers will be sent next week.

THANK YOU