The KPI Dictionary

Functional Area series

The Sales and Customer Service KPI Dictionary

220+ Key Performance Indicator definitions

Customer Service · Sales

THE KPI INSTITUTE

smartKPIs.com
The smart choice in performance management

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Introduction

Dictionaries have been around for centuries and their main function is to provide conceptual or linguistic definitions, along with information about the correct language usage. The earliest historical mention of a dictionary is from Babylon, in the 6th century BC. The Chinese had their first written dictionary in 100 AD, while Japanese history mentions its first dictionary in the 7th century AD. In Europe, the earliest dictionaries didn't contain definitions of words. Instead, they were bilingual dictionaries, meaning you could look up a French word and find its English equivalent, or vice versa. The first English alphabetical dictionary, called "A Table Alphabetical", was published in London, in 1604.

The Sales and Customer Service KPI Dictionary – 220+ Key Performance Indicator Definitions is a novelty in the field and distinguishes itself from the classical structure of a dictionary in that it shows the performance indicators grouped into 2 main functions: Sales and Customer Service. The dictionary not only defines the indicators, but also contains an explicit presentation of their calculation formula.



The KPI Institute is the global authority on performance management through Key Performance Indicators (KPIs) research and education, providing through its publications and training courses insights on how to measure and learn with KPIs. It has developed the first KPI Management Framework and it operates several research programs dedicated to performance management, strategy, Balanced Scorecard and Key Performance Indicators. It manages smartKPIs.com, the result of a research program dedicated to documenting and cataloguing how KPIs are used in practice. It is an online portal containing the largest collection of well documented KPI examples, supported by a community of tens of thousands of members.

Over the last 10 years, The KPI Institute team has:

- Documented 7,000+ KPIs from 16 functional areas and 25 industries, with Premium Documentation;
- Reviewed 1,000+ performance reports from 125 countries;
- Referenced 30,000+ resources (books, articles, performance reports) as part of the documentation process;
- Developed over 150 KPI Dashboards and Balanced Scorecards;
- Delivered training courses in 25 countries based on 6 continents;
- Assisted over 28,000 organizations in finding solutions for their KPI needs;
- Trained over 3,400 participants from 40 countries on how to rigorously work with KPIs.

The main activities of The KPI Institute include:

Research - Contributing to the development of the performance management discipline by actively researching and publishing articles on this matter. Driven by the belief that progress in management science emerges from practice, the research programs are aimed at reviewing KPI and performance management examples, as used in various countries, functional areas and industries.

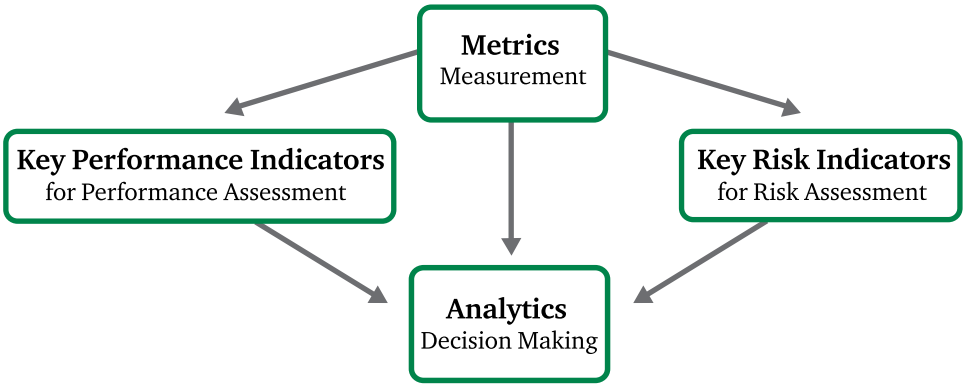
Publications - In order to facilitate the identification and usage of KPIs in practice, The KPI Institute has developed the Top KPIs Reports collection, along with more extensive resources, like The KPI Compendium and The KPI Dictionaries. Also, to assist organizations in designing or improving their performance management architecture, The KPI Institute offers the Toolkit series, containing editable templates, customized for specific industries and functional areas. The Performance Management report series accompanies the list of publications, by providing a comprehensive assessment of the state of the discipline across a specific year. Interesting articles on topics related to performance management are accessible to the public on PERFORMANCE Magazine, The KPI Institute's online magazine dedicated to strategy and performance.

Education - In an effort to improve the way KPIs are understood and employed in organizations worldwide, The KPI Institute provides a broad set of educational services. The training offer includes the Certified KPI Professional and Certified KPI Practitioner courses, along with 9 other certification programs on performance related topics. Specialized training courses, customized to specific functional areas or industries, are also part of the portfolio. Along with its research and education projects, The KPI Institute is at the forefront of innovation in performance management, integrating both the academic and practitioner perspectives. Analyzing emerging trends and best practices represents the fundamentals of The KPI Institute's body of knowledge.

About Key Performance Indicators (KPIs)

In many domains of human activity, the usage of tools is essential for achieving the desired results. Measurement and evaluation make no exception, being equipped with both conceptual and physical tools. Of the first category, at the core of any performance measurement and management system are the Key Performance Indicators (KPIs) used. They provide the important data that is monitored and reported within an organization, by using scorecards or dashboards.

In practice, the terminology used to express them is diverse. The most common expressions are: performance measures, performance indicators, metrics, key performance indicators or key result areas. Both academic and practitioner literature use these terms interchangeably, oftentimes even within the same organization. This can cause confusion among stakeholders, and it can also affect the way these tools are used in practice. Establishing a common terminology at organizational level brings everyone on the same page and facilitates a consistent approach to KPIs. To bring more clarity in working with KPIs, The KPI Institute recommends the following approach:



Metric – It has its roots in the word "metron," used in ancient Greece to reflect measurement. Metrics refer to something we can measure, a value, or a quantity. Examples of metrics are: # Air temperature, # Air quality, # Water depth, # Height, # Weight or # Employees. When metrics reflect the achievement of a desired state, they become Key Performance Indicators. Oftentimes, metrics represent the subordinated measures used for calculating a KPI.

Key Performance Indicator (KPI) – A measurable expression for the achievement of a desired level of results, in an area relevant to the evaluated entity's activity. KPIs make objectives quantifiable, providing visibility into the performance of individuals, teams, departments and organizations and enabling decision makers to take action in achieving the desired outcomes. Typically, KPIs are monitored and communicated through dashboards, scorecards and other forms of performance reports.

Key Risk Indicator (KRI) – A metric that provides an early warning regarding an increased risk exposure in a certain area of operations. For example, a high level of % Clients experiencing financial difficulties can indicate the risk of not being able to collect all debts and will negatively impact $ Write-off accounts. By monitoring KRIs, managers are able to take a proactive approach in risk management by preventing incidents or diminishing their impact, when they occur.

Analytics – Consists in a data analysis of KPI results, meant to determine trends and data patterns in order to provide valuable information for better decision making. Analytics offer a better understanding of how the business works, and the interdependencies between KPIs. Predictive analytics can provide valuable insights in regards to our customers' purchasing habits, the best time to launch a product, or how internal processes can be optimized.

In conclusion, everything we measure is a metric. If it reflects performance it becomes a KPI. If it reflects risk, it becomes a KRI. With all of these tools – metrics, KPIs and KRIs – we can do analytics to explore trends.

Key Performance Indicators Infographic

Terminology

KPI

Definition:
A measurable expression for the achievement of a desired level of results in an area relevant to the entity's activity.

SMART Objectives

SMART Objective =

Objective	Increase customers base
+KPI	% Market share
+Target	20%
+Timeframe	By Financial Year End
+Responsible	Sales Director

Increase customers base to reach 20% market share by FY end under Sales Director leadership

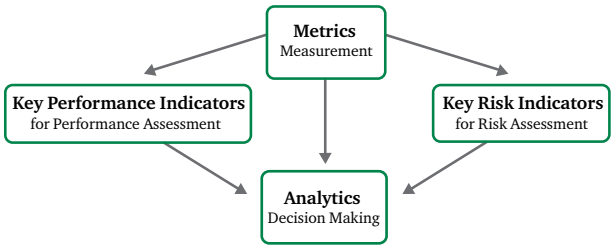
KPI naming standards
KPIs – start with symbols

- **Value of** $ Net profit — $
- **Number of** # Defects — #
- **Percentage of** % Budget variance — %

Value added by KPIs

- **Clarity**
  Paint a clear picture of strategy
- **Focus**
  Focus on what matters / requires attention
- **Improvement**
  Monitor progress towards the desired state

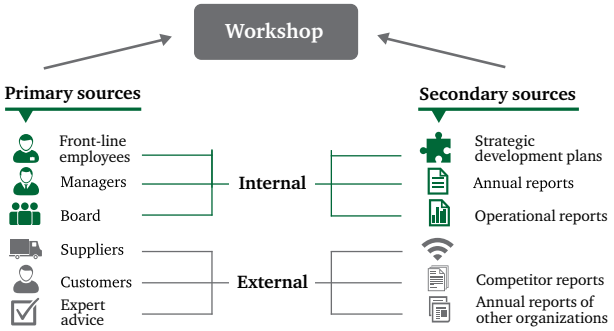
Metrics - KPIs - KRIs - Analytics



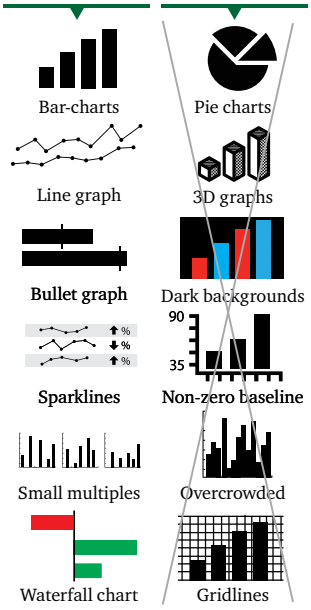
KPI selection criteria

- **Relevant**
  Aligned with organizational strategy; Significant for the specific domain of services
- **Clearly defined**
  KPIs should be described by using clear and intelligible terms. Avoid the use of management jargon
- **Balanced**
  Quality / Quantity; Efficiency / Effectiveness; Subjectivity / Objectivity

KPI selection workshop input



Data visualization



KPI selection technique: Value flow analysis

Objective: Continuously improve skills through learning experience

Input	Process	Output	Outcome
$ Training budget	# Training hours per employee	% Employees trained	% Staff meeting desired competency levels
# Training support staff	# Training courses organized	% Participant satisfaction with training experience	# Skill level

KPI documentation

Name % Hospital bed occupancy rate

Definition

Measures the percentage of beds in the hospital that are occupied by patients, from overall number of hospital beds.

Calculation

Subordinate measures used for calculation
A = # Hospital beds occupied B = # Hospital beds

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Within range

Target

Threshold example
Red: < 80% ; >95% Yellow: 80 - 85% ; 90 - 95% Green: 85 - 90%

Functional Areas

Accounting
% Billing accuracy
$ Cost of goods sold
% Client cash net revenue
% Invoices under query
# Days in accounts receivable

Compliance and Risk
$ Loss expectancy
% Operational risk
# Corporate governance index
# Frequency of inventory audit
# Turnaround time for audits

Customer Service
Speed of answer
Complaints received
Call handling time
% Complaints resolved
% Call abandon rate

Finance
Berry ratio
% Capital acquisition ratio
% Basic earning power ratio
# Labor multiplier
% Return on funds employed

HSSE
Lost time injury frequency rate
$ Energy consumption cost
# Hours of OHS training conducted
# Operational spills
# Lost workdays due to accidents

Human Resources
Employee engagement index
Time to fill a vacant position
% Employee turnover
% Employee satisfaction
# Training hours per FTE

Industries

Call Center
% Call setup success rate
% Agent utilization
% Call completion rate
% First call resolution rate
% Call drop rate

Customs
Arrival processing time
Entry clearance referrals
% Work permits issued
# Immigration refusals
% Hit rate on high risk cargoes

Education & Training
National examination score
% Attendance rate per course
# Students to professor ratio
% Drop-out rate
% Student satisfaction rate

Financial Institutions
Insurance underwriting time
Insurance claim processing time
% Cash collection rate
% Risk coverage ratio
# Liquidity ratio

Government - State/Federal
$ Gross National Product per capita
# Healthy life expectancy
% Unemployment rate
# Water scarcity index
% Health insurance coverage

KPIs... Naturally

Measurement as a human activity is not new. It emerged in early history as a mean for discovery and sense making. Archaeologists consider the first measurement tool used in human history to be the Lebombo bone, a baboon fibula containing 29 cut notches. Dated 35,000 BC, this tally stick was discovered in the Lebombo Mountains in Swaziland.

Evaluation, as a form of measurement, was used as early as the 3rd century AD, when emperors of the Wei Dynasty rated the performance of the official family members. The biased nature of individual performance evaluation was noticed by Chinese philosopher, Sin Yu, who reportedly criticized a rater employed by the Wei Dynasty with the following words: "The Imperial Rater of Nine Grade seldom rates men according to their merits, but always according to his likes and dislikes."

A major milestone in making the connection between measuring, as a human activity, and performance, was in 1494, when Luca Pacioli published, in Venice, 'Summa de arithmetica, geometrica, proportioni et proportionalita' ('Everything on arithmetic, geometry, proportions and proportionality'). It detailed a practice the Venetian sailors had in place to evaluate the performance of their sailing expeditions, which became the basis of the double-entry accounting system. In time, the subjective nature of individual performance evaluations and the dominance of financial indicators for evaluating enterprise performance became stepping stones for performance management in human activities. The industrial revolution added to this combination the "organization as a machine" metaphor that played a major role in driving improvements in efficiency and effectiveness. The result was an organizational performance management model based on mechanistic, command-and-control thinking, driven by subjective individual performance assessments, and financial indicators, and crowned by pay-for-performance arrangements.

Did it work?
To a certain extent, yes. Many organizations flourished and matured based on this model.

Does it have flaws?
Many. And while historical circumstances attenuated them in time, today's environment amplifies and exposes them at an accelerated rate.

Is there a better way?
Yes, but it is not simple. It requires a change at multiple levels, from the underlying philosophy of performance, to mentalities and processes. This is not easy. Over time, the use of Key Performance Indicators (KPIs) became synonym to performance measurement and management. KPIs are the link between the old and the new in performance management. Their use, however, is much richer and rewarding in an environment based on organic performance architecture principles:

Organizations are echo-systems in their own right. They vary in terms of maturity and the environment in which they operate. As such, their use of performance management systems should reflect their own "personality". You can try to build an igloo in Sahara, but it won't be sustainable. The performance architecture of each organization needs to be unique and to reflect its internal and external environment.

Systems thinking provides a much richer context for understanding and improving performance. Command-and-control worked for the army, over time, for increasing productivity of unskilled workers during the industrial revolution, and for managing large organizations (such as the public service). Today, knowledge workers form the majority of the workforce in developed economies operate in a much more interconnected environment and have to make decisions at an accelerated pace. Understanding the systems in which we operate, analyzing flow, and learning based on data become ever more important today and complement the traditional simplistic managerial approach of executing orders from above.

KPIs should be used primarily for learning. The role of KPIs should be the one of providing the required information to assist in navigating towards desired results. The same principle is used by ants, who leave pheromone trails to assist each other in navigating towards the food source. Similarly, the nerve impulses travel through the different points of the nervous system, transmitting information. KPIs results should travel through the organization, facilitating communication, providing a base for analysis / synthesis and, ultimately, decision making across all levels of the organization.

Data accuracy in human administration is an elusive desideratum. Neils Bohr once said: "Accuracy and clarity of statement are mutually exclusive." Accuracy is a challenge in exact sciences and even more so in human administration. Striving to obtain any KPI data is a challenge in itself for many organizations, and data accuracy is an even bigger task. The use of KPIs should acknowledge this aspect and be oriented towards making the most out of existent data, oftentimes by using variance intervals. This approach is used by the human body. If the temperature drops under a safe limit, we shiver. If the temperature increases, we sweat. Both are performance improvement initiatives of the body, aimed to regulate its temperature back to safe limits. The KPI here is the temperature. While it is not a constant, its trend is good when within certain safe limits.

The use of KPIs for rewards and punishment should be limited and driven by self-assessment. Purposeful oriented behavior is a characteristic of living organisms. For humans and many other species, this behavior is amplified by rewards and punishment. Along with this amplification, risks are amplified too. Gaming of results, lack of cooperation, decreased morale, and work accidents are some of the undesired consequences. On the other hand, the majority of nerve impulses in the human body transmit general information. Only in particular situations pleasure or pain is signaled. Similarly, the use of KPIs for rewards and punishment should be the exception to the rule, rather than the norm.

Embedding KPIs in organizations through visualization and communication of KPIs results is the key to maximizing their value added. Variations in the KPIs used by the human body are felt by our senses, as their impact is sensory rich. Similarly, KPIs used in an organizational context should be embedded in everyday use and be a part of the working experience. The most important aspect of communicating KPI results is their visual representation. This is key, both in terms of optimizing the layout of the data representation, and the presence of visual displays in the working environment. The range of media is diverse today: posters, whiteboards, banners, LED and LCD monitors should be combined to bring results to life across the organization. KPI results should not be restricted to paper reports and computer screens anymore.

New philosophy of performance, driven by self-assessment and purposeful achievement as a mean to happiness. While happiness bears different meanings to many, a common expression of this feeling is the result of the purposeful achievement of a desiderate. Achieving something we want, while shared with others, is about us and it reverberates strongly in our inner self. Transposing this powerful catalyst of performance in both our personal, and our organizational lives is facilitated by a new paradigm: Happiness is driven by achievement. Achievement is an expression of performance. If we want to be in control of our happiness, we should be in control of our performance. Self-assessment of performance results is not easy. However, if more emphasis is placed on building this capability in each employee, organizations can benefit by creating a rewarding environment conducive to happiness. In this environment, managers can focus on understanding and improving the working system, while employees can focus on self-assessment of the results' achievement, learning and communicating. Purposeful achievement of results in a well-structured working system would bring both individuals and organizations much closer to happiness and fulfilment, as opposed to the payment of bonuses practice in the current command-and-control driven dominant paradigm.

KPIs are here to stay. The question we have to answer is how do we want to use them: mechanistically or naturally?



Aurel Brudan
Chief Executive Officer
The KPI Institute

Insights into the Sales and Customer Service

Top performing organizations use sales and customer service analytics to understand the shifting behavior of customers, to respond to highly fluctuating customer needs and concerns, and to improve key processes in order to remain competitive. Companies that have proved successful in retaining existing clients, as well as attracting new ones, constantly monitor their customer service efforts in relation to their long-term goals.

The purpose of performance measurement in Sales should go beyond monitoring the volume of sales as a main driver for profitability. Key Performance Indicators should be oriented towards sales force competencies, personality traits and behaviors, on performance appraisals and compensation packages, and on the deployment of a cohesive sales strategy that accommodates the organization.

Customer service is a key component of an organization's overall strategy to achieve high performance. Capitalizing on the value of both existing and potential customer segments implies that an organization commits itself to delivering an invaluable customer service experience. Through a coherent customer service strategy, a company cannot only reduce its costs, but also increase customer satisfaction and revenue. Through service delivery management and modern technology, organizations should be able to maximize the overall customer experience, as well as optimize their customer-centric framework.

Companies that are focused on expanding their profitable customer networks target the ideal sets of customers and use Key Performance Indicators to assess and monitor their sales and customer service capabilities. If they are working on reducing their $ Customer service costs, high performing organizations focus on increasing % First contact resolution rate and lowering their # Call handling time. Increased revenue can be obtained through better customer retention and portfolio management. % Cross-sell and up-sell ratios are a good indicator of a company's ability to build a strong relationship with its customers, by upgrading its products / services, and capitalizing on their improvement.



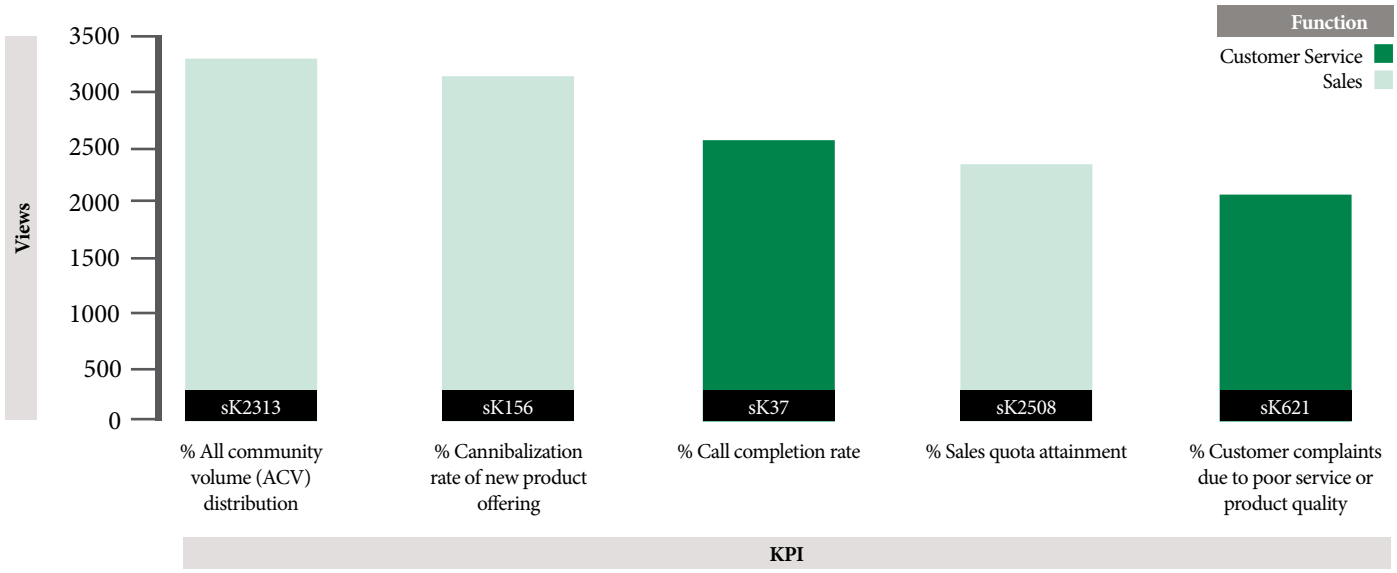
As Sales and Customer Service are closely related divisions in an organization, they can be analyzed together. The 2 functions hereby presented cover the most prominent facets of Sales and Customer Service.

• **Sales KPIs** reflect on the process of promoting and supplying customers with the deliverables they need, in a way that is productive and efficient to the company which commercializes the goods.

• **Customer Service KPIs** focus on the measurement of both qualitative and quantitative aspects of customer related services, such as time spent in a call, or the ability to respond and solve clients' requests.

Most Popular Sales and Customer Service Key Performance Indicators

Both the Sales and Customer Service functions are represented within the ranking of the most popular Key Performance Indicators. Due to the extensive and elaborate use of measurement in the Sales division, KPIs pertaining to this function benefit from a sizeable usage.



As highlighted in the ranking above, % All commodity volume distribution, % Cannibalization rate of new product offerings, and % Sales quota attainment are the most popular KPIs among active professionals in the field. This emphasizes the importance professionals place on three dimensions of the Sales division: volume distribution, product liability to replacement, and sales performance.

% Call completion rate is a performance indicator for inbound call center operations, and it supports the optimal use of infrastructure to satisfy customer inquiries and complaints. A comprehensive call completion strategy helps companies retain existing customers and increase revenue by completing more calls.

By monitoring % Customer complaints due to poor service or product quality, companies are looking to assess customer satisfaction. Unsatisfied clients do not only impact the business on short terms, but they also affect it on the long run. Complaining customers sharing their negative experiences, especially through social media channels, can become viral and seriously affect the business. The process of managing complaints is highly important for a company, as it impacts future revenues, retention rates and customer advocacy. Having official complaints from customers creates awareness about product or process weaknesses that enables the organization to react and maybe win back the customer.

Sales and Customer Service Taxonomy

# KPIs	Subcategory
140	Sales

# KPIs	Subcategory
90	Customer Service

How to use this book

The Sales and Customer Service KPI Dictionary is an effective tool in the process of understanding, selecting and working with KPIs. The booklet contains definitions and calculation formulas for 230 KPIs practiced in the Sales and Customer Service areas.

Sales and Customer Service professionals, practitioners, consultants, researchers, managers and academics can now build their own database, encompassing the most important elements of Sales and Customer Service key performance indicators: definitions and formulas. The Sales and Customer Service KPI Dictionary supersedes dozens of publications in the search for Sales and Customer Service KPIs, bringing the most relevant information in one single book.

The Sales and Customer Service KPI Dictionary is easy to use, as the KPIs are clustered on a sub-category basis and sorted in alphabetical order. Furthermore, each indicator contains the following sections:

NAME

Each KPI name is preceded by a symbol. There are three symbols used depending on the KPI's measurement unit:

- **$** - value of: $ Revenue per succesful call
- **#** - number of: # Complaints received
- **%** - percentage of: % Gross profit margin

% First contact resolution rate

Measures the percentage of requests resolved during the first contact with the customer, from overall customer requests.

% Calls resolved without complaint or referral
% First call resolution

(A/B)*100

sK6144

DEFINITION

Succinct description of the indicator, providing more details in regards to what the KPI is measuring.

It also supports a better understanding of how to calculate the KPI.

% First contact resolution rate

Measures the percentage of requests resolved during the first contact with the customer, from overall customer requests.

% Calls resolved without complaint or referral
% First call resolution

(A/B)*100

sK6144

SUB-METRICS

Metrics used in calculating the KPI.

In some cases, the KPI may not need any other metrics for calculation and this section will coincide with the KPI's name

% First contact resolution rate

Measures the percentage of requests resolved during the first contact with the customer, from overall customer requests.

% Calls resolved without complaint or referral
% First call resolution

(A/B)*100

sK6144

CALCULATION FORMULA

Expresses the mathematical formula to compute the KPI. The calculation formula is expressed in six different forms, depending on the specifics of each KPI:

- A - *count*
- (A/B)* 100 - *rate*
- A/B - *ratio*
- (A1 + A2 +…+An)/n - *average*
- Index - *aggregates more items in one score*
- Survey - *data is gathered through a survey*

% First contact resolution rate

Measures the percentage of requests resolved during the first contact with the customer, from overall customer requests.

% Calls resolved without complaint or referral
% First call resolution

(A/B)*100 sK6144

ID CODE

Indicates the unique numerical reference assigned to each KPI on smartKPIs.com.

This code can be used to search more details about the KPI on *http://www.smartkpis.com/kpi/browse-kpis/*

% First contact resolution rate

Measures the percentage of requests resolved during the first contact with the customer, from overall customer requests.

% Calls resolved without complaint or referral
% First call resolution

(A/B)*100 sK6144

The Sales and Customer Service KPI Dictionary can be used in the early stages of implementing a performance management framework, in the process of selecting and documenting KPIs, but also to improve an existing performance measurement system. Discover how you can get the best out of this Dictionary and benefit from a unique, integrated resource that will assist you in improving the performance of your Sales and Customer services!

Be a part of the KPIs' world!

Sales and Customer Service refer to the activities conducted to actually exchange the organization's goods and/or services for financial value and provide a series of additional services to customers, such as pre, during and post-sales assistance.

Customer Service stands for an organization's capability to offer support and assistance for the existing and potential customers, at their required qualitative level. The objective of this capability is to ensure increased customer satisfaction, loyalty and advocacy.

% Acknowledged emails

Measures the rate at which customer emails are followed up by acknowledgment replies.

A = # Emails acknowledged
B = # Emails

(A/B)*100

sK2397

After call work time

Measures the average amount of time it takes for a customer service representative to complete the service request or for a sales representative to complete the sale after the call has ended.

Ai = # After call work time to complete request/sale 'i', where i=1 to n
n = # Calls handled

(A1+A2+...+An)/n

sK1081

% Agent availability rate

Measures the percentage of time agents and systems are available to take incoming calls from total work time.

A = # Time when people and systems are available
B = # Scheduled work time

(A/B)*100

sK1360

% Blockage

Measures the percentage of customer calls that do not reach the service operators due to insufficient employees or network facilities in place.

A = # Customer calls that do not reach the operators
B = # Incoming customer calls

(A/B)*100

sK2386

Busy signals

Measures the total number of busy signals received during customer calls.

A = # Busy signals received

A

sK2374

% Call abandon rate

Measures the percentage of customer calls which are abandoned while in queue, waiting for service, from overall calls.

A = # Calls disconnected before an agent was able to respond
B = # Incoming calls

(A/B)*100

sK168

% Call completion rate

Measures the rate at which calls are successfully initiated, compared to the number of attempted calls.

A = # Calls successfully initiated (per hour or day)
B = # Call attempts (per hour or day)

(A/B)*100

sK166

Call handling time

Measures the average time needed for one call to be handled, including the talk time and the work performed after the call.

Ai = # Handling time for call 'i', (in minutes), where i=1 to n
n = # Calls handled

(A1+A2+...+An)/n

sK165

% Call transfer rate

Measures the percentage of calls transferred between operators from the total number of calls received.

A = # Transferred calls between operators
B = # Calls received

(A/B)*100

sK1017

% Calls answered within service level time

Measures the percentage of calls answered within a defined time frame, out of the total number of answered calls.

A = # Calls answered within the determined time frame
B = # Calls answered

(A/B)*100

sK1114

% Calls on hold longer than X seconds

Measures the rate at which calls are put on hold for a period of time longer that a predefined and accepted one.

A = # Calls on hold more that X seconds
B = # Calls

(A/B)*100

sK2357

% Complaints not resolved in X hours

Measures the rate at which customer complaints fail to be solved within a predefined and accepted time frame.

A = # Complaints that were not solved in less that X hours
B = # Complaints received

(A/B)*100

sK2358

% Complaints not resolved on first call

Measures the rate at which complaints fail to be resolved at the first call made by the customer.

A = # Complaints that were not solved at first call
B = # Complaints

(A/B)*100

sK2359

Complaints received

Measures the volume of customer complaints received.

A = # Complaints received from customers

A

sK751

% Complaints resolved

Measures the percentage of solved complaints from customers, from overall problems raised by customers.

A = # Problems or complaints solved
B = # Problems or complaints raised by customers

(A/B)*100

sK2377

% Complaints resolved

Measures the percentage of complaints responded to within the standard time, from overall complaints addressed by customers.

A = # Complaints responded to within standard time
B = # Complaints addressed by customers

(A/B)*100

sK6857

% Complete and on time delivery

Measures the rate at which orders fulfill delivery standards in regards to time and completeness.

A = # Orders shipped on time and complete
B = # Orders shipped

(A/B)*100

sK2362

% Computer telephony integration (CTI)

Measures the integration level of the telephony systems with other service management computer infrastructure.

A = % Computer telephony integration level

A

sK2392

% Consistency of advice

Measures the rate at which consumers appreciate the advice received as being consistent.

A = # Consumers stating they received consistent advice
B = # Customers receiving advice

(A/B)*100

sK2382

% Correspondence replied to on time

Measures the rate at which customer correspondence is replied on time.

A = # Correspondence replied on time
B = # Correspondence

(A/B)*100

sK2370

$ Cost of monitoring and reporting of SLAs

Measures the average expense with monitoring and reporting of a Service Level Agreement (SLA).

Ai = # Cost of monitoring and reporting SLA 'i', where i=1 to n
n = # SLAs

(A1+A2+...+An)/n

sK3574

% Customer calls answered in the first minute

Measured the rate at which customers calls are being answered during the first minute.

A = # Customer calls answered in the first minute
B = # Customer calls

(A/B)*100

sK32

$ Customer care funding per resolved complaint

Measures the value spent from customer care funds allocated to solve a complaint, on average.

A = $ Customer care funds allocated and spent for solving complaints
B = # Customer complaints spent

A/B

sK6752

% Customer complaints due to poor service or product quality

Measures the percentage of customer complaints registered by the organization, as a result of poor quality of services or products offered, out of the total number of complaints received.

A = # Customer complaints due to quality of services or products
B = # Customer complaints

(A/B)*100

sK621

% Customer complaints resolved on the first contact

Measures the percentage of customer complaints resolved at the first contact, out of the overall customer complaints handled.

A = # Customer complaints resolved at first contact
B = # Complaints handled

(A/B)*100

sK6357

% Customer emails with no response

Measures the volume of emails received from customers with no reply by a customer service representative, from the overall emails received.

A = # Customer emails without replies
B = # Customer emails received

(A/B)*100

sK2393

Customer focus groups

Measures the number of customer focus groups organized for providing feedback in regards to the services and relations developed with customers.

A = # Customer focus groups

A

sK6773

% Customer loyalty

Measures the percentage of customers who are loyal, from total customers. Loyal customers may be defined based on specific criteria, such as: purchase frequency, spending per purchase, share of wallet and so forth.

A = # Loyal customers
B = # Customers

(A/B)*100

sK6899

% Customer satisfaction

Measures the proportion of clients who expressed satisfaction in relation to the services or products received.

A = # Customers who are satisfied with the services or products received
B = # Customers

(A/B)*100

sK7000

% Customer satisfaction

Measures the satisfaction level of the company's customers.

A = # Customer satisfaction
Surveys assessing customer satisfaction are usually tailored to each organization.

A, based on survey

sK14068

% Customer satisfaction with complaints handling

Measures the percentage of customers satisfied with the way their complaints were solved, from overall customers that have made a complaint.

A = # Customers satisfied with the way their complaints were solved
B = # Customers that have made a complaint

(A/B)*100

sK2399

% Customer satisfaction with service levels

Measures the percentage of customers who are satisfied with the company's overall service levels (before, during and post-sale), out of the total number of customers surveyed.

A = # Customers stating they are satisfied with the service levels
B = # Customers surveyed

(A/B)*100

sK2379

$ Customer service expense per client

Measures the costs of customer services per client.

A = $ Customer service spend
B = # Customers

A/B

sK2356

% Customer service representatives (CSR) occupancy

Measures the amount of time customer service representatives use for handling customer requests from the total time assigned.

A = # Time taken to handle customer requests
B = # Time assigned

(A/B)*100

sK2383

% Customers who can track order status online

Measures the percentage of customers who can track their order status online, out of the total number of customers.

A = # Customers who can track order status online
B = # Customers

(A/B)*100

sK4030

% Customers without service contract

Measures the percentage of customers who lack a service contract, from the overall client database.

A = # Customers without support contract
B = # Customers

(A/B)*100

sK2400

Customer relationship tenure

Measures the average time a customer used the services or products provided by the company, as a result of a contractual relationship.

Ai = # Relationship / contractual duration with customer 'i', where i=1 to n
n = # Customers

(A1+A2+...+An)/n

sK6692

Delays from promised delivery date

Measures the gap between the promised date for delivery and the date at which delivery is actually performed.

A = # Actual delivery date
B = # Promised date for delivery

A-B

sK2351

% Email response in one day

Measures the rate at which customer emails receive a response in one day.

A = # Emails with response in one day
B = # Emails

(A/B)*100

sK2394

% End-to-end availability of services

Measures the services availability when each component is functioning properly.

A = # Committed hours of availability
B = # Outage hours

[(A-B)/A]*100

sK3566

% First contact resolution rate

Measures the percentage of requests resolved during the first contact with the customer, from overall customer requests.

A = # Request resolved during first contact with the customer
B = # Customer requests

(A/B)*100

sK6144

% Inaccurate client updates

Measures the percentage of incomplete or inaccurate client records, out of the total number of client records.

A = # Incomplete and inaccurate client records
B = # Client records

(A/B)*100

sK5880

% Interactions routed properly

Measures the percentage of customer calls that are routed to the proper Customer Service Representative (CSR), according to their service request or need, out of the total customer calls handled.

A = # Customer calls routed properly
B = # Customer calls handled

(A/B)*100

sK2390

% Interactive voice response (IVR) completion rate

Measures the rate at which calls entered in the Interactive Voice Response (IVR) system are completed within the IVR.

A = # Calls completed in the IVR
B = # Calls entered in the IVR

(A/B)*100

sK2385

Jointly developed service level agreements

Measures the number of service level agreements (SLAs) developed in collaboration or partnership with customer representatives. SLAs are negotiated service contracts between service provider and customers which define the level of services, responsibilities, priorities, guaranties or warranties that must be met as established.

A = # Service agreements developed in collaboration with customer representatives

A

sK6748

Longest call hold

Measures the longest amount of time a customer waits after being put on hold and before being connected to an agent or hanging up.

A = # Longest duration of a customer call that is put on hold

A

sK2372

Longest delay in queue

Measures the longest period a customer waited in a queue before being connected to an operator or hanging up.

A = # Longest wait in a queue before being connected to an operator or hanging up, in seconds

A

sK2373

% New account processes that utilize automated document routing

Measures the percentage of processes for establishing new accounts that utilize automated document routing.

A = # New account processes that utilize automated document routing
B = # New account processes

(A/B)*100

sK6125

% Not in good order account applications (NIGO)

Measures the percentage of account applications that need to be sent back for changes or clarifications, from the total number of account applications.

A = # Account applications not in good order
B = # Account applications received

(A/B)*100

sK5887

On-hold time

Measures the average time a customer call is put on hold before the call is being transferred to an agent or abandoned.

A = # On-hold time for call 'i' (in seconds), where i =1 to n
n = # Calls put on hold

(A1+A2+...+An)/n

sK2375

% Online positive comments

Measures the percentage of the online positive comments, from overall online reviews registered.

A = # Online positive comments
B = # Online comments

(A/B)*100

sK6852

% Order entry error rate

Measures the rate at which errors occur at the order entry process.

A = # Order entries with errors
B = # Order entries

(A/B)*100

sK2355

Orders processed

Measures the volume of orders processed (orders that have been picked from the incoming orders system and have been finalized by shipping the product to the customer).

A = # Orders picked and with product shipped

A

sK2367

% Overdue service requests

Measure the percentage of overdue service requests (not closed and not solved within the established time frame) out of the total number of service requests managed.

A = # Overdue service requests (not closed and not solved within the established time frame)
B = # Service requests managed

(A/B)*100

sK1001

Paperwork turnaround time

Measures the time it takes customers to return paperwork.

Ai = # Time from paperwork requested to time returned for instance 'i', where i=1 to n
n = # Instances observed

(A1+A2+...+An)/n

sK5886

Pick-to-ship cycle time for customer orders

Measures the average time (in hours or days) from the moment of picking the order to the moment of shipping the product to the client.

Ai = # Time from picking to shipping order 'i', in days, where i=1 to n
n = # Orders shipped

(A1+A2+...+An)/n

sK701

Queue length at service points

Measures the average number of people waiting in the queue at a service point.

Ai = # People waiting for service delivery in queue 'i', where i=1 to n
n = # Queues that occured

(A1+A2+...+An)/n

sK6454

% Repeat calls

Measures the percentage of calls that were related to an issue for which a previous call was made, but was not solved satisfactory for the client.

A = # Calls related to an issue for which a previous call was made
B = # Calls

(A/B)*100

sK1380

% Reports submitted on-time

Measures the percentage of reports that were submitted on time, out of the total reports planned for submission.

A = # On-time reports submitted in a month
B = # Reports expected for submission in a month

(A/B)*100

sK383

% Resolution of queries the same day

Measures the rate at which customer queries are solved the same day they are submitted.

A = # Queries resolved in the same day
B = # Queries submitted

(A/B)*100

sK2366

Response time to business partner request

Measures the amount of time between the submission of a request and the receipt of the response.

Ai = # Response time to business partner request 'i' in days, where i=1 to n
n = # Business partner requests launched

(A1+A2+...+An)/n

sK380

Reviews available online

Measures the number of reviews from customers that are available online, on the official website or review sites.

A = # Reviews available online

A

sK6900

% Right answers or advice the first time

Measures the rate at which customer service personnel provides the appropriate answer or advice at first contact with the customer.

A = # Answers/advice that are right at first contact
B = # Answers/advice provided

(A/B)*100

sK2380

% Sales invoices issued on time

Measures the rate at which sales invoices are being issued in due time.

A = # Sales invoices issued on due time
B = # Sales invoices issued

(A/B)*100

sK2365

Service calls to travel time

Measures the ratio at which service calls match the travel time of a customer service person in a given time period.

A = # Service calls of a customer service person in a given time period
B = # Service calls in the given time period
C = # Travel time of a customer sales person in a given time period
D = # Travel time in the given time period

[(A/B)*100] / [(C/D)*100]

sK31

% Service charges of profits

Measures the extent at which the profits come from customer service charges.

A = $ Customer service charges
B = $ Profit

(A/B)*100

sK4682

% Service level

Measures the rate at which a service is being delivered at a certain standard or quality level (i.e % calls that are being answered in the first 30 seconds).

A = # Situations in which the expected level of service is accomplished
B = # Situations

(A/B)*100

sK2387

% Service Level Agreements (SLAs) with effective review and follow-up

Measures the percentage of SLAs with effective review and follow-up, out of the total SLAs reviewed.

A = # SLAs with effective review and follow-up
B = # SLAs

(A/B)*100

sK3567

Service requests outstanding

Measures the number of service requests that have not been fulfilled.

A = # Service requests that ought to have been fulfilled

A

sK2363

Service requests per agent

Measures the average number of service requests received by each service department or call center employee during a particular period.

A = # Service requests
B = # Agents (service desk or call center)

A/B

sK1079

Service time

Measures how long it takes from receiving a service request until resolution and the point the customer is informed about the result.

A = # Service time
B = # Service requests

A/B

sK2395

Speed of answer (SA)

Measures the average speed of answering a customer's call by an available agent, after the call is being placed in a queue.

Ai = # Speed to answer call 'i', in seconds, where i=1 to n
n = # Calls

(A1+A2+...+An)/n

sK1113

Support requests

Measures the volume of support requests received in period.

A = # Support requests received in period

A

sK2381

Talk time

Measures the average time an agent spends with a customer or a prospect, from the moment it answers the phone until the call is disconnected.

Ai = # Talk time for call 'i', in seconds, where i=1 to n
n = # Calls completed

(A1+A2+...+An)/n

sK2378

Time from inquiry to response

Measures how long it takes for a customer's inquiry to receive a response from the service team.

Ai = # Time a customer waits for response to inquiry 'i', in hours, where i=1 to n
n = # Inquiries

(A1+A2+...+An)/n

sK2352

% Time spent by case managers securing authorizations

Measures the time case managers spend securing authorizations as a percentage of the total work time per case manager.

A = # Time spent securing authorizations
B = # Work time per case manager

(A/B)*100

sK6178

Time spent on customer relations

Measures the total time spent maintaining and improving customers relationships by best servicing their needs.

Ai = # Time spent on customer relationships 'i' (in hours), where i=1 to n
n = # Customers

(A1+A2+...+An)/n

sK6780

Time spent on customer relations related issues

Measures the average time spent on customer relations related issues per customer.

A = # Time spent with customer relations related issues
B = # Served customers

A/B

sK6354

Time spent visiting customers

Measures the total time spent visiting customers in order to nurture the customer relationship and screen for new suggestion or ideas to improve the company products and services.

Ai = # Time spent visiting customer 'i' (in hours or days), where i=1 to n
n = # Customers visited

(A1+A2+...+An)/n

sK6700

Time taken from order to delivery

Measures the duration of one order fulfillment, from receiving order to delivery.

Ai = # Time to fulfill order 'i', where i=1 to n
n = # Orders

(A1+A2+...+An)/n

sK2371

Time to develop a Service Level Agreement (SLA)

Measures the average time needed to develop a Service Level Agreement.

Ai = # Time needed to develop SLA 'i', where i=1 to n
n = # SLAs

(A1+A2+...+An)/n

sK3573

Time to process a customer account transfer

Measures the amount of time it takes on average to process the application to transfer a customer account to another supplier of services (such as a competitor).

Ai = # Time lapse from the moment the account transfer request is received to the moment it is processed for request 'i', where i=1 to n
n = # Account transfer requests received

(A1+A2+...+An)/n

sK6186

Time to process customer returns

Measures the average time spent for processing a customer return.

Ai = # Time to process merchandise returned from customer 'i', where i=1 to n
n = # Customer returns processed

(A1+A2+...+An)/n

sK6740

Time to resolve complaints

Measures how long it takes to resolve a customer's complaint after receiving it.

Ai = # Time spent solving customer complaint 'i', in days, where i=1 to n
n = # Complaints received

(A1+A2+...+An)/n

sK2353

Time to respond to a Service Level Agreement (SLA) request

Measures the average reaction time to a Service Level Agreement (SLA) request.

Ai = # Response time to SLA request 'i', where i=1 to n
n = # SLA requests

(A1+A2+...+An)/n

sK3572

% Unique information requests

Measures the rate at which information requests from customers are being fulfilled so as not to be repeated.

A = # Information requests that are not repeated
B = # Information requests

(A/B)*100

sK2389

% Unique received calls

Measures the percentage of unique callers who attempt and successfully access the company.

A = # Unique phone numbers who accessed the answering service
B = # Unique phone numbers that attempted to access the answering service

(A/B)*100

sK292

Waiting time

Measures how long it takes for a customer to reach to an agent (face-to-face, by phone, chat or web collaboration).

A = # Time customers wait to reach an agent
B = # Service requests in period

(A/B)*100

sK2398

% Work orders closed within the specified time period

Measures the extent to which work orders (during the post-sale support service) are completed within the requested time period.

A = # Work orders closed within the specified time period
B = # Work orders closed

(A/B)*100

sK598

Sales is the activity of trading goods or services. KPIs measure the amount of sales both from a volume and monetary perspective, the productivity and efficiency of sales agents, the retention of customers and their satisfaction.

$ Activated new business value

Measures the total value of all new business contracts that became active in the selected period to date. A new business contract is considered activated in this period if it is signed and has a start date in the selected period to date.

Ai = $ New business contract 'i', where i=1 to n
n = # Activated new business contracts

(A1+A2...+An)

sK148

% Adjusted trial rate

Adjusts the simple estimation of trial by integrating consumer awareness of the product and all commodity volume distribution.

A = % Trial
B = % Awareness
C = % All commodity volume distribution

A*B*C

sK2302

% All commodity volume (ACV) distribution

Measures the brand or product availability, as a result of numeric distribution, weighted by its share of all commodity sales.

A = $ Sales of stores that stock the brand
B = $ Sales of all stores

(A/B)*100

sK2313

$ Allowable cost per order

Measures the amount that the company can afford to spend on each customer in order to promote the product.

A = $ Revenue
B = $ All expenses (including profit and contribution)

A-B

sK2288

% Attempted contact of potential customers in database

Measures the percentage of existing customer records for which an attempt of contact has been done, from overall customer records.

A = # Records of potential customers in database that were attempted to be contacted
B = # Records of potential customers in database

(A/B)*100

sK1428

$ Baseline sales

Estimates the expected sales, excluding sales due to the marketing program.

A = $ Expected sales without marketing program

A

sK2331

% Bids for proposals accepted

Measures the number of bids for proposals accepted, from the total bids submitted.

A = # Bids for proposals accepted
B = # Bids

(A/B)*100

sK2250

% Cannibalization rate of new product offering

Measures the decrease in sales of existing products due to launching new products.

A = $ Sales of the new product that cannibalized existing products
B = $ Sales of the new product

(A/B)*100

sK156

$ Channel margin

Measures the average margin achieved when operating in multiple sales channels.

Ai = $ Sales through channel 'i', where i=1 to n
Bi = % Margin achieved in channel 'i', where i=1 to n
n = # Sales channels

A1*B1+...+An*Bn

sK2297

Closed deals in the sales pipeline

Measures the volume of closed deals in the sales pipeline.

A = # Closed deals in the pipeline

A

sK2344

% Closing ratio

Measures the extent to which sales proposals convert into actual sales.

A = # Deals closed
B = # Sales proposals

(A/B)*100

sK23

$ Commission earned per sales agent

Measures the amount earned on average by an agent per sale successfully completed.

Ai = $ Commission earned by the sales agent 'i', where i=1 to n
n = # Transactions / Sales completed

(A1+A2+...An)/n

sK3975

% Commission margin

Measures the percentage of the sales commission value from the sales completed.

A = $ Commission for sales completed
B = $ Sales completed

(A/B)*100

sK3977

% Completely automated sales orders level

Measures the level of sales order automation, in terms of sales that do not require manual intervention at any point.

A = # Sales orders that require no manual intervention
B = # Sales orders

(A/B)*100

sK2343

% Compound annual growth rate (CAGR)

Measures the average growth rate in sales value over a period of time longer than one year (which is measured by the year-on-year growth rate).

A = $ Sales at the end of period
B = $ Sales at the beginning of period
n = # Years within period

{(A/B)^(1/n)}-1

sK2309

Contacts per sale closed

Measures the number of contacts of prospects necessary, on average, to close a sale.

A = # Contacts / visits to all prospects
B = # Sales closed

A/B

sK6590

$ Contribution margin per unit

Measures the increase in value generated by each new product unit.

A = $ Unit selling price
B = $ Unit variable costs

A-B

sK2294

% Conversation to appointment rate

Measures the percentage of conversations that lead to appointments with potential customers, which can then lead to sales.

A = # Conversations that lead to sales appointments
B = # Conversations

(A/B)*100

sK2281

$ Cost of incremental sales

Measures the cost of the marketing program relative to the incremental sales generated.

A = $ Cost of marketing program under evaluation
B = $ Incremental sales from marketing program

A/B

sK2332

% Cost of sales force from sales

Measures the cost of the sales force, as a percentage of the sales revenue achieved.

A = $ Cost of sales force
B = $ Sales revenue

(A/B)*100

sK6582

$ Cost per lead

Measures the cost incurred by the company in generating one lead (i.e. person interested in buying its product).

A = $ Expenditures
B = # Leads

A/B

sK116

% Coupon conversion

Measures the rate at which coupons have been used by customers.

A = # Coupons used by the customers
B = # Coupons given to the customers

(A/B)*100

sK70

$ Coupon cost

Measures the cost of the overall coupon campaign (including redemption, printing and distribution expenses).

A = $ Cost per redemption
B = # Coupons redeemed
C = $ Cost of printing and distribution

A*B+C

sK2327

% Cross sale rate

Measures the percentage of revenue that comes from cross selling (i.e. selling additional products to the same customers), out of sales revenue.

A = $ Revenue from selling additional products to customers interested in a specific product
B = $ Revenue from sales

(A/B)*100

sK2283

$ Customer repeat purchase value

Measures the value of all purchases done by a customer in the reporting period.

Ai = $ Purchase ""i"" done by the customer considered, where i=1 to n
n = # Customer purchases in reporting period

A1+A2+...+An

sK2276

% Customer winback rate

Measures the rate at which existing inactive customers are reactivated after a period of inactivity.

A = # Reactivated customers
B = # Inactive customers

(A/B)*100

sK2342

Customers per salesperson

Measures the ratio of customers to available sales persons.

A = # Customers
B = # Sales representatives

A/B

sK6589

% Delayed sales opportunities

Measures the rate at which sales opportunities fail to be moved from one stage to another in due time.

A = # Sales opportunities that are delayed
B = # Sales opportunities

(A/B)*100

sK2341

Email leads created

Measures the number of new email leads that were acquired during a designated period of time and are associated with email interaction and service or products advertising.

A = # Email leads created

A

sK1136

Estimated sales

Estimates the total sales volume, based on population, frequency of purchase and individual purchase volume.

A = # Penetration
B = # Frequency of purchase
C = # Purchase volume

A*B*C

sK2301

Financial services outreach

Measures the number of clients served or accounts that are active at a given point in time. The number of active clients includes borrowers, depositors, and other clients who are currently accessing any financial services.

A= # Active clients or accounts

A

sK4586

% First appointment-to-sales proposal ratio

Measures the ratio of initial sales appointments that progress to the the next stage of the sales process, the proposal stage.

A = # Proposals made
B = # First appointments achieved

(A/B)*100

sK22

$ First purchase sales

Measures the average value of the company's goods or services sold to a first purchaser.

A = $ Cumulative value of first purchase sales
B = # First-time customers

A/B

sK6581

$ Incremental sales from marketing

Measures the increase in baseline sales due to marketing efforts.

A = $ Incremental sales from advertising
B = $ Incremental sales from promotions
C = $ Incremental sales from other

A+B+C

sK2330

% Involuntary customer churn

Measures the rate at which involuntary customer churn occurs. Involuntary churn happens when customer give up on the company product involuntarily (when they move to another location where the product is not available, for example).

A = # Customers lost due to involuntary reasons
B = # Customers

(A/B)*100

sK2347

Items sold per transaction

Measures the average number of items sold per transaction.

A = # Product items sold
B = # Transactions

A/B

sK2266

% Lead conversion rate

Measures the percentage of leads which are converted to actual sales, from overall well-qualified leads.

A = # Leads converted into sales
B = # Well-qualified leads

(A/B)*100

sK164

Leads generated by agents

Measures the volume of leads (potential customers that might be interested in the product) as a result of the sales agents' activity.

A = # Leads as a result of the sales agents' activity

A

sK2249

% Lift from promotion

Measures the increase in sales generated by the incremental sales, as a percentage of the baseline sales.

A= $/# Incremental sales from marketing
B= $/# Baseline sales

(A/B)*100

sK2333

% Margin

Measures the unit margin as a percentage of the unit price.

A = $ Unit margin
B = $ Unit price

(A/B)*100

sK2290

% Markdown

Measures the ratio of discount to original price charged.

A = $ Price reduction of stock keeping unit (SKU)
B = $ Original price of stock keeping unit

(A/B)*100

sK2318

% Markdown goods

Measures the percentage of products sold at markdown prices, from all the products sold.

A = # Products sold at markdown prices
B = # Products sold

(A/B)*100

sK420

% Missed sales opportunities

Measures the rate of missed opportunities to all existing opportunities. A neglected opportunity is when no follow-up contact has been made with a potential customer.

A = # Missed/neglected potential accounts
B = # Potential accounts

(A/B)*100

sK2337

$ Net income per sales representative

Measures the average net sales achieved on a per sales representative basis.

A = $ Net profit from sales
B = # Sales representatives

A/B

sK2286

New business proposals submitted

Measures the number of business proposals submitted to potential clients, in order to persuade them to acquire a particular service.

A = # New business proposals submitted

A

sK6917

New-hire time to quota attainment

Measures the time it takes, on average, for a new hired sales representative to attain the sales quota that has been set.

Ai = # Time taken from hiring to quota attainment for employee 'i', in months, where i=1 to n
n = # Sales representatives under evaluation

(A1+A2...+An)/n

sK2339

% Numeric distribution

Measures the percentage of stores in a particular geographic area that stock a brand or a product.

A = # Stores that stock the brand
B = # Stores

(A/B)*100

sK2311

Order frequency

Measures the average number of orders coming in per day / per week / per month.

A = # Orders in period
B = # Time units (days, weeks, months) in period

A/B

sK2236

% Out-of-stocks

Measures the availability of the brand at every point in the stores where listed.

A = # Stores where the brand is listed, but unavailable
B = # Stores where the brand is listed

(A/B)*100

sK2317

% Pass-through rate

Compares the value between the discount received (from manufacturers) and the discount offered (to final consumers).

A = $ Trade discounts to consumers
B = $ Manufactures discount to trade

(A/B)*100

sK2258

% Pipeline coverage

Measures the ratio of the total amount in the sales pipeline against the sales goal.

A = $ Sales in pipeline
B = $ Sales goal

A/B

sK7061

Potential new clients contacted

Measures the number of potential new clients that were contacted in order to generate a sale.

A = # Potential new clients contacted

A

sK6916

$ Potential revenue in sales pipeline

Estimates the maximum potential revenue that could be achieved in the sales pipeline.

A = $ Potential revenue that can be achieved in the sales pipeline

A

sK2245

$ Price per statistical unit

Measures the average price per one statistical unit, by weighting SKU (stock keeping units) prices by relevant percentages of each SKU in a statistical unit.

Ai = $ Price of SKU “”i””, where i=1 to n
Bi = % Weight of SKU “”i”” in the statistical unit considered, where i=1 to n
n = # SKUs in the statistical unit

(A1*B1+...+An*Bn)/n

sK2293

$ Price per unit

Measures the average price of one product unit sold.

A = $ Revenue from sales
B = # Units sold

A/B

sK2292

% Price waterfall effect

Compares the actual price paid for a product to its list price.

A= $ Net/pocket price (the actual price paid after all discounts and allowances)
B= $ List price (the price before the discounts and allowances are considered)

(A/B)*100

sK2335

% Product category performance ratio

Measures the performance of a retailer in a particular product category, relative to its performance in all product categories.

A = % PCV distribution
B = % ACV distribution

A/B

sK2315

Product category sales in a specific geographic area

Measures the volume of category sales achieved in a specific region or geographic area.

A = # Sales in category in the geographic area considered

A

sK2265

% Product category volume (PCV) distribution

Measures the availability of the brand, or the product, within established stores for that category.

A = $ Category sales of all stores that stock the brand
B = $ Category sales of all stores

(A/B)*100

sK2314

Product samples dispensed

Measures the volume of product samples dispensed in the reporting period.

A = # Product samples dispensed in the reporting period

A

sK2259

$ Profits from new products or business operations

Measures the value of profits generated by new products or business activities.

A = $ Profits from new products or business operations

A

sK2242

Promotions conducted

Measures the number of promotional programs conducted in the reporting period.

A = # Promotions conducted in the reporting period

A

sK2261

Purchase frequency

Measures the average number of times a customer makes a purchase within a given period of time.

Ai = # Times customer ""i"" buys in period, where i=1,...,n
n = # Customers that buy in the reporting period

(A1+A2+...+An)/n

sK2255

% Rebates breakage rate

Measures the percentage of rebates that are not redeemed by customers.

A = # Rebates not redeemed
B = # Rebates

(A/B)*100

sK2329

% Repeat buyers

Measures the percentage of the customers that have bought the product more than once, from overall customers.

A = # Customers that have bought the product more than once
B = # Purchasers

(A/B)*100

sK2305

% Repeat purchase rate

Measures the rate at which consumers make repeat purchases.

A = # Repeat customers
B = # Customers

(A/B)*100

sK2303

Repeat purchase volume

Measures the volume of sales coming from repeat purchases.

A = # Sales volume coming from repeat customers

A

sK2256

% Repurchases of services following project completion

Measures the project`s impact on subsequent purchases.

A = # Repurchases after project completion
B = # Repurchases before project completion

(A/B)*100

sK157

% Return on sales (ROS)

Measures the percentage of sales revenue that is captured in profit.

A = $ Net income
B = $ Sales revenue

(A/B)*100

sK2336

$ Revenue by product

Measures the sales revenue by each product type or category.

Ai = $ Price of product 'i' from a specific product line, where i=1 to n
Bi = # Products in the line sold, where i=1 to n

Ai*Bi

sK4489

% Revenue from new products

Measures the percentage of revenue generated by sales of new products.

A = $ Revenue from new products
B = $ Revenue

(A/B)*100

sK2241

$ Revenue from post sale services

Measures the revenues associated with support services provided post sale.

A = $ Post sale revenues

A

sK6749

$ Revenue gained from top customers

Measures the sales value accounted for by the top customers (i.e three / ten largest customers).

A = $ Revenue generated by the top three / ten customers

A

sK2233

% Revenue market share by segment

Measures the share of sales value accounted for by the business in a particular market segment.

A = $ Company sales in segment
B = $ Sales in segment

(A/B)*100

sK2279

$ Revenue per sale

Measures the average value of a sales transaction.

A = $ Revenue from sales
B = # Sales (transactions)

A/B

sK21

$ Revenue per sales representative

Measures the value of the revenue on a per sales representative basis, on average.

A = $ Revenue
B = # Sales representatives

A/B

sK2285

$ Revenue per successful call

Measures the revenue from sales on a per call basis.

A = $ Revenue from sales calls
B = # Calls

A/B

sK5

% Revenue to average market sales revenue

Compared the company's revenue to the average revenue achieved by all competitors in the market.

A = $ Company revenue
B = $ Revenue achieved in market

(A/B)*100

sK2262

% Rotting leads

Measures the ratio of leads that are being delivered to sales and do not have an activity recorded within a predefined time frame.

A = # Rotting leads
B = # Leads

(A/B)*100

sK2350

% Sales accounts with open and pending status

Measures the percentage of current open and pending accounts waiting to be closed for negotiation, from the overall number of sales accounts.

A = # Open sales accounts
B = # Pending sales accounts
C = # Sales accounts

[(A+B)/C]*100

sK6196

Sales as a result of the average purchase

Measures the volume of sales as a result of the average amount of one purchase multiplied by the number of purchases.

A = # Customers (# Selling opportunities)
B = % Closing ratio
C = # Average amount purchased

A*B*C

sK333

$ Sales by department

Measures the sales revenue achieved by each department, responsible for a product or product category.

A = $ Turnover achieved by a department (usually, responsible for a product or product category)

A

sK332

$ Sales by manager

Measures the sales value accounted for by each sales manager.

A = $ Sales achieved by manager "X"

A

sK2243

% Sales by product category

Measures the percentage of sales generated by a product category from overall gross sales.

A = $ Sales generated by a product category
B = $ Gross sales

(A/B)*100

sK4548

Sales channel density ratio

Evaluates the presence of the seller (the "feet on the street") in a given location, as a result of dividing the number of sales agents or sales outlets to the number of target consumers in the area.

A = # Sales agents / Sales outlets in the considered area
B = # Potential customers

A/B

sK2271

% Sales channel margin

Measures the profitability of sales achieved in the various channels used.

A = $ Unit margin in channel
B = $ Price in channel

(A/B)*100

sK2291

$ Sales compensation per unit

Measures the average sales compensation giver per one unit (product item) sold.

A = $ Sales compensations (commissions, bonuses, rewards etc.)
B = # Units sold

A/B

sK2272

$ Sales compensation per value of sales

Measures the average sales compensation given per one dollar value of sales.

A = $ Sales compensation (bonuses, commissions etc.)
B = $ Sales

A/B

sK2273

Sales contacts to sales closed ratio

Measures the ratio of sales contacts to sales completed during a defined period of time.

A = # Sales contacts
B = # Sales closed

A/B

sK6689

Sales cycle duration

Measures the time between the initiation of the sales process and the moment the purchase decision is made.

A = # Time from the initiation of the sales process until the purchase decision

A

sK2287

% Sales discounts

Measures the average discount in price, in order to promote sales, reduce inventory, and reward or encourage behavior that benefits the issuer of the discount or allowance.

Ai = $ Price of item 'i', where i=1 to n
Bi = % Discount for item 'i', where i=1 to n
n = # Items with discounts

[(A1*B1+...+An*Bn)/(A1+...+An)]*100

sK4807

$ Sales force effectiveness

Measures sales person or sales team performance in terms of contacts, active accounts and their buying power compared to total sales.

A = $ Sales
B = # Contacts (calls, visits) or # Active accounts or # Potential accounts or $ Buying power

A/B

sK2312

Sales forecast reports frequency

Measures the average time that elapses from one sales forecast report to another.

A = # Age of sales forecast 'i', in months, where i=1 to n
n = # Sales forecasts in period

(A1+A2...+An)/n

sK2340

% Sales from cross-selling among business units

Measures the percentage by which cross-selling among business units contributes to the overall sales.

A = $ Sales coming from cross-selling among business units
B = $ Sales

(A/B)*100

sK2239

% Sales from newly launched products or services

Measures the ratio of sales generated by newly launched products or services (launched in the last 12 months, for example).

A = $ Sales from newly launched products or services
B = $ Sales

(A/B)*100

sK2282

% Sales from products whose patents are about to expire with

Measures the percentage of sales made from products whose patents will expire within one year, out of the total sales recorded.

A = $ Sales from products whose patents will expire within 12 months
B = $ Sales

(A/B)*100

sK6360

% Sales from repeat customers

Measures the percentage of revenue coming from repeat customers (customers that have made more than one purchase).

A = $ Revenue from repeat customers
B = $ Revenue

(A/B)*100

sK4756

$ Sales goal per catalog

Measures the target sales value expected to be generated by one catalog distributed, considering the costs associated with catalog production and mailing.

A = $ Cost to produce and mail one catalog
B = $ Desired profit

A+B

sK2269

$ Sales goal per page

Measures the desired sales value expected to be generated for each catalog page, considering the costs associated with producing and mailing one catalog page.

A = $ Cost to produce and mail one page
B = $ Desired profit

A+B

sK2270

% Sales growth

Expresses the changes in the sales value or the sales volume from one period to the following.

A = $ Sales for the current period
B = $ Sales for the previous period considered
Alternatively
A = # Sales for the current period
B = # Sales for the previous period considered

[(A-B)/B]*100

sK2308

% Sales growth by market segment

Measures the rate by which each market segment grows from one period to another.

A = $ Sales achieved in current period for segment under evaluation
B = $ Sales in the previous period achieved for the market segment

{A-B)/B}*100

sK2244

% Sales growth in stores open at least 12 months

Measures the percentage of the sales value variance in stores open for at least 12 months, compared with the previous sales performance.

A = $ Sales in stores open at least 12 months in the current measurement period
B = $ Sales in stores open at least 12 months in the previous measurement period

(A-B)/B*100

sK1699

% Sales on deal

Measures the percentage of the sales that benefited from a temporary trade discount of any type. Standard discounts, such as cash discount (i. e. discount offered for early payment) are not included.

A = $ Sales with a temporary discount
B = $ Sales

(A/B)*100

sK2334

Sales penetration

Measures the total population that is buying in the current period, by adding former buyers to new triers.

A = # Users in the previous period
B = # Repeat rate in the current period for the users in previous period
C = # New triers in the current period

A*B+C

sK2300

$ Sales per customer

Measures the average value of products or services purchased by a customer.

A = $ Gross sales
B = # Customers

A/B

sK4546

$ Sales per labor hour

Measures the average amount of sales per labor hours worked.

A = $ Gross sales
B = # Labor hours

A/B

sK4549

$ Sales potential forecast

Estimates the future sales value based on the projected number of accounts and their buying power.

A = # Possible future accounts
B = $ Average buying power

A*B

sK2310

% Sales quota attainment

Measures the rate at which the sales quota for a given time period has been attained.

A = $ Attained sales
B = $ Target sales

(A/B)*100

sK68

% Sales representatives with sales quota attainment

Measures the percentage of sales representatives that have achieved their set quota of sales, from overall sales agents.

A = # Sales representatives that achieved the quota
B = # Sales representatives

(A/B)*100

sK2338

% Sales revenue mix by location

Measures the percentage of sales generated by a certain location, from overall gross sales.

A = $ Sales generated by location
B = $ Gross sales

(A/B)*100

sK6762

Sales volume productivity

Measures the productivity of the sales agents, expressed as the average volume of sales achieved by one agent.

A = # Sales
B = # Sales agents

A/B

sK2275

$ Sales revenue per hour

Measures the sales revenue achieved on an hourly basis, as an average.

A = $ Sales revenue per day (or week, or weekend)
B = # Hours the store was open for sale

A/B

sK422

% Sales with coupon

Measures the percentage of sales that are due to coupon conversions, out of total sales during the reporting period.

A = # Sales with coupon
B = # Sales

(A/B)*100

sK2328

Sales that had to be declined

Measures the total number of potential sales that had to be declined from various reasons.

A = # Sales that had to be declined

A

sK6356

% Sales with discounts from total sales

Measures how much discounted sales account from the total sales achieved.

A = $ Sales with discount
B = $ Sales

(A/B)*100

sK2254

% Sales to new customers

Measures the percentage of sales value credited to new customers, from the overall value of sales.

A = $ Revenue to sales to new customers
B = $ Revenue from sales

(A/B)*100

sK4048

$ Sales-to-date

Measures the sales value achieved in reporting period (from the year start to the current date).

A = $ Sales achieved from year start to date

A

sK2345

$ Sales turnover

Measures the total value of goods and/or services that were provided by the company to customers. Sales turnover is often expressed in monetary terms, but can also be expressed in terms of the total amount of stock or products disposed.

A = $ Sales price
B = # Products produced or purchased and disposed off the company's warehouse

A*B

sK712

Selling costs to sales ratio

Measures the costs of the selling process (usually marketing and distribution costs) from the value of sales.

A = $ Costs of selling
B = $ Sales

A/B

sK2246

$ Sales value productivity

Measures the average value of sales achieved by sales agents.

A = $ Revenue from sales
B = # Sales agents

A/B

sK2274

Selling opportunities

Measures the number of shoppers that visit the store, creating selling opportunities.

A = # Shoppers that come to the store

A

sK331

$ Selling price

Measures the average selling price achieved in the case of multichannel selling.

Ai = % Units sold through channel ""i"", where i=1 to n
Bi = $ Selling price in channel ""i"", where i=1 to n
n = # Sales channels

A1*B1+...+An*Bn

sK2298

% Sell-through

Measures the ratio of products that are sold from the beginning inventory.

A = # Products sold in a month
B = # Inventory at the beginning of the month

(A/B)*100

sK317

% Share of shelf

Measures the display prominence of the brand, by comparing the brand facing to all possible facing positions.

A = # Brand facings
B = # Possible facings

(A/B)*100

sK2316

% Share of wallet

Measures the ratio of a customer's total spendings dedicated to purchasing from a particular brand or company.

A = $ Customer spendings dedicated to purchasing from the company
B = $ Customer spendings

(A/B)*100

sK2280

Stock keeping units in portfolio

Measures the number of stock keeping units that exist in the portfolio of products on the retailer's offer. A stock keeping unit (SKU) refers to an item that is unique, due to certain characteristics (size, color, brand) and because of its unique identification number in the inventory.

A = # Stock keeping units available in the retailer's inventory

A

sK2264

% Store conversion rate

Measures the percentage of sales transactions, from the potential customers that visited the store.

A = # Sales transactions
B = # Potential customers that entered the store

(A/B)*100

sK421

Successful to unsuccessful tenders

Measures the ratio of successful to unsuccessful tenders responded to by the organization.

A = # Successful (won) tenders
B = # Unsuccessful (lost) tenders

A/B

sK2234

$ Telemarketing cost per sales lead

Measures the cost of telemarketing on a per lead generated basis (person interested in a catalog, a second call or a meeting).

A = $ Telemarketing costs
B = # Sales leads

A/B

sK2277

Time from customer contact to sales response

Measures the average reaction time between the customer inquiry and sales response.

Ai = # Time between contact and sales response for customer 'i', where i=1 to n
n = Customer contacts / inquiries

(A1+A2...+An)/n

sK6688

% Time on deal

Measures the percentage of time during which promotions are active.

A = # Time during which there are promotions (days, weeks)
B = # Time within measurement period (days, weeks)

(A/B)*100

sK2257

% Time spent with key customers

Measures the percentage of time spent by a sales agent with key customers, from overall sales or customer service time.

A = # Time spent with key customers
B = # Time spent on sales / customer service

(A/B)*100

sK6765

$ Transaction revenue

Measures the amount of revenue generated from active accounts on a daily basis.

A = $ Daily transaction revenue

A

sK7066

% Trial users in the market

Measures the volume of first-time users of the product or service offered to the market from the total target population in the market.

A = # Trial population
B = # Target population

(A/B)*100

sK2299

Trial volume

Measures the volume of the purchases accounted for by the trial population.

A = # Trial population
B = # Units per trial purchase

A*B

sK2306

$ Unit margin

Measures the sales margin corresponding to one product unit.

A = $ Unit price
B = $ Unit cost

A-B

sK2289

% Unit sales to average market unit sales

Compares the company's volume of sales to the average sales volume in the market.

A = # Company's sales volume
B = # Average sales volume in market

(A/B)*100

sK2263

% Up sale rate

Measures the percentage of revenue from up selling (i.e. selling upgraded, more expensive products to the same customers), out of overall sales revenue.

A = $ Revenue from up selling
B = $ Revenue from sales

(A/B)*100

sK2369

% Vendors participating in promotional campaigns

Measures the ratio of vendors that participate in the company's promotional campaigns.

A = # Vendors that participate in promotional campaigns
B = # Vendors

(A/B)*100

sK2260

% Voluntary customer churn

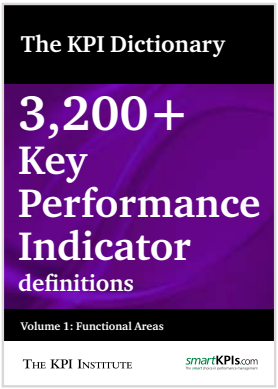
Measures the rate at which voluntary customer churn occurs. Voluntary churn refers to lost costumers due to their decision to give up on the company products or services.

A = # Customers that voluntarily give up on the company products or services and switch to competition
B = # Customers

(A/B)*100

sK2346

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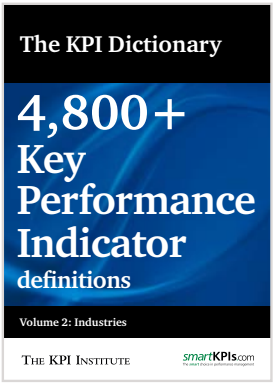
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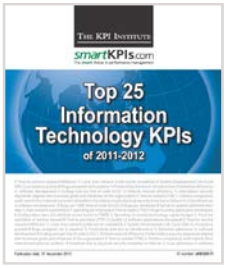






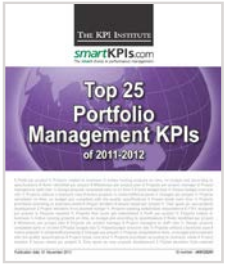


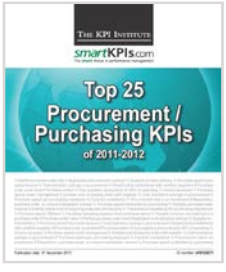


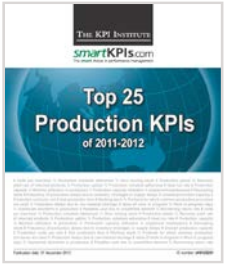










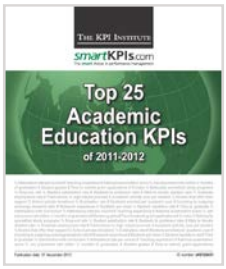








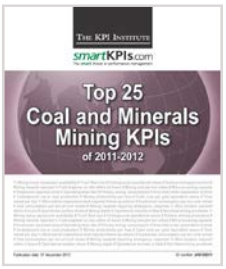
Reports by Industry









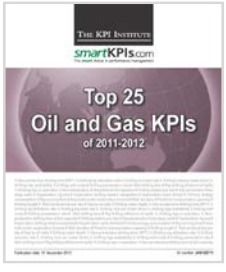


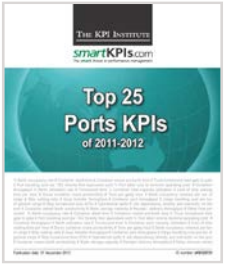




















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Top 25 Portfolio Management KPIs of 2013-2015
Top 25 Procurement / Purchasing KPIs of 2013-2015
Top 25 Production KPIs of 2013-2015
Top 25 Profitability KPIs of 2013-2015
Top 25 Project Management KPIs of 2013-2015
Top 25 Public Relations KPIs of 2013-2015
Top 25 Quality Management KPIs of 2013-2015
Top 25 R&D KPIs of 2013-2015
Top 25 Recruitment KPIs of 2013-2015
Top 25 Retention KPIs of 2013-2015
Top 25 Risk Management KPIs of 2013-2015
Top 25 Sales KPIs of 2013-2015*
Top 25 Search Engine Optimisation (SEO) KPIs of 2013-2015
Top 25 Service Delivery KPIs of 2013-2015
Top 25 Service Management KPIs of 2013-2015
Top 25 Supply Chain Management KPIs of 2013-2015
Top 25 Supply Chain*, Procurement, Distribution KPIs of 2013-2015
Top 25 Talent Development KPIs of 2013-2015
Top 25 Web Analytics KPIs of 2013-2015
Top 25 Workforce KPIs of 2013-2015
Top 25 Working Environment KPIs of 2013-2015

Reports by Industry

Top 25 Academic Education KPIs of 2013-2015
Top 25 Accounting Services KPIs of 2013-2015
Top 25 Airlines KPIs of 2013-2015
Top 25 Airports KPIs of 2013-2015
Top 25 Banking and Credit KPIs of 2013-2015
Top 25 Broadcasting (TV and Radio) KPIs of 2013-2015
Top 25 Business Consulting KPIs of 2013-2015
Top 25 Call Center KPIs of 2013-2015
Top 25 Civil Engineering KPIs of 2013-2015
Top 25 Coaching / Training KPIs of 2013-2015
Top 25 Coal and Minerals Mining KPIs of 2013-2015
Top 25 Colleges and Universities KPIs of 2013-2015
Top 25 Construction of Buildings KPIs of 2013-2015
Top 25 Crops KPIs of 2013-2015
Top 25 Customs KPIs of 2013-2015
Top 25 Electricity KPIs of 2013-2015
Top 25 Emergency Response / Ambulance Services KPIs of 2013-2015
Top 25 Engineering KPIs of 2013-2015
Top 25 Event Production and Promotion KPIs of 2013-2015
Top 25 Film and Music KPIs of 2013-2015
Top 25 Forestry and Logging KPIs of 2013-2015
Top 25 Healthcare KPIs of 2013-2015
Top 25 Hospitals KPIs of 2013-2015
Top 25 Hotel KPIs of 2013-2015
Top 25 Insurance KPIs of 2013-2015
Top 25 Investments KPIs of 2013-2015
Top 25 Land Transport (Road & Rail) KPIs of 2013-2015
Top 25 Legal Practice KPIs of 2013-2015
Top 25 Libraries and Archives KPIs of 2013-2015
Top 25 Livestock, Hunting and Fishing KPIs of 2013-2015
Top 25 Local Government KPIs of 2013-2015
Top 25 Local Public Transport KPIs of 2013-2015
Top 25 Medical Laboratory KPIs of 2013-2015
Top 25 Medical Practice KPIs of 2013-2015
Top 25 Mortgages KPIs of 2013-2015
Top 25 Museums KPIs of 2013-2015
Top 25 Natural Gas KPIs of 2013-2015
Top 25 NGO KPIs of 2013-2015
Top 25 Oil and Gas KPIs of 2013-2015
Top 25 Pension Funds KPIs of 2013-2015
Top 25 Ports KPIs of 2013-2015
Top 25 Postal and Courier Services KPIs of 2013-2015
Top 25 Preventive Healthcare KPIs of 2013-2015
Top 25 Primary and Secondary Schools / K-12 KPIs of 2013-2015
Top 25 Property Management KPIs of 2013-2015
Top 25 Publishing KPIs of 2013-2015
Top 25 Railways KPIs of 2013-2015
Top 25 Real Estate Development KPIs of 2013-2015
Top 25 Real Estate Transactions KPIs of 2013-2015
Top 25 Recruitment / Employment Activities KPIs of 2013-2015
Top 25 Restaurant KPIs of 2013-2015
Top 25 Retail KPIs of 2013-2015
Top 25 Roads KPIs of 2013-2015
Top 25 Shipping KPIs of 2013-2015
Top 25 Social Media KPIs of 2013-2015
Top 25 Sport Club Management KPIs of 2013-2015
Top 25 Sport Event Organisation KPIs of 2013-2015
Top 25 State Government KPIs of 2013-2015
Top 25 Sustainability KPIs of 2013-2015
Top 25 Telecommunications KPIs of 2013-2015
Top 25 Tour Operator KPIs of 2013-2015
Top 25 Training and Other Education KPIs of 2013-2015
Top 25 Travel Agency KPIs of 2013-2015
Top 25 Water and Sewage KPIs of 2013-2015

The KPI Institute Professional Certification Programs

To browse through our upcoming training courses and select the solution that best addresses your personal and professional objectives we recommend you visit: **http://store.kpiinstitute.org/scheduled-courses**

Certified Strategy and Business Planning Professional



The course will help improve the business planning process and long-term organizational performance, through the use of strategic planning tools that will ultimately lead to smarter and quicker strategic decisions.

Certified Data Visualization Professional



An exclusive framework that provides insights on effective visual communication, through a rigorous approach to creating visual representations of vast information, techniques of standardization and tailored data visualization tools.

Certified KPI Professional and Practitioner



This program is meant to improve the practical skills in working with KPIs and developing instruments like scorecards and dashboards. Participants will acquire a sound framework to measure KPIs, starting from the moment they are selected, until results are collected in performance reports.

Certified Data Analysis Professional



Attendants will understand through practical learning how to effectively collect, analyze and interpret data by enabling managers/ analysts to draw insights from both quantitative and qualitative data, based on historical statistics and trend analysis.

Certified Performance Improvement Professional



This course offers insights and best practices for improving performance in different scenarios, from data analysis and reporting, decision making and initiative management, to building a performance culture.

Certified Benchmarking Professional



Benchmarking methodological uniqueness is represented by the identification and analysis of the processes that lead to a superior performance of a company, offering the opportunity to compare an organization's performance against industry competitors.

Certified Employee Performance Management Professional



Attendees will gain exposure to best practices and key concepts and will learn how to establish and use criteria for performance evaluations, from implementation to improvement and maintenance of the company's employee performance management system.

Certified Supplier Performance Professional



Participants' skills in managing supplier performance and developing a strategic approach to procurement will be developed by enabling the identification of performance gaps and implementing action agreements with suppliers.

Certified Personal Performance Professional



The two-day interactive program will help you understand personal performance, by explaining the benefits and clarifying the process of measuring it. It focuses on identifying ways to boost your performance outside working hours.

Certified Customer Service Performance Professional



Participants will not only understand the importance and implementation phases for the Customer Service Excellence standards, but they will be given the necessary tools to implement it internally and measure its impact externally.

Certification Programs Infographic 2015



Scheduled Courses in 2015

CERTIFICATION TRAINING COURSES IN **25** COUNTRIES

Africa	Americas	Asia Pacific	Europe	Middle East
Morocco	Brazil	Australia	Austria	Bahrain
Nigeria	Canada	China	Romania	Egypt
South Africa	Mexico	India	UK	Kuwait
	USA	Indonesia		Oman
		Malaysia		Qatar
		Singapore		Saudi Arabia
		Thailand		Turkey
				UAE



ORGANIZATION

2004 Year of establishment

25 # Certified trainers

4 # Offices around the globe. Australia, Malaysia, Romania, UAE

RESEARCH

28,000 # Organizations assisted through smartKPIs.com

20,475 # KPI examples published on smartKPIs.com

11 # Years spent on researching performance best practice

EDUCATION

3,400 # Professionals trained

614 # Client organizations

554 # Training days delivered

228 # Education programs delivered

115 # Open training courses delivered

113 # In-house training courses delivered

For more details visit: **www.store.kpiinstitute.org**

The KPI Institute

The KPI Institute is the global authority on performance management through Key Performance Indicators (KPIs) research and education, providing through its publications and training courses insights on how to measure and learn with KPIs. It developed the first KPI Management Framework and operates several research programs dedicated to performance management, strategy, Balanced Scorecard and Key Performance Indicators. It also operates smartKPIs.com, the result of the research program dedicated to documenting and cataloguing how KPIs are used in practice, an online portal containing the largest collection of well documented KPI examples, with over 20,500 examples from 16 Functional Areas and 25 Industries. Over the last 11 years, The KPI Institute has assisted over 28,000 organizations in finding solutions to their KPI needs.

The Sales and Customer Service KPI Dictionary – 220+ Key Performance Indicator Definitions is a novelty in the field and distinguishes itself from the classical structure of a dictionary in that it shows the performance indicators grouped into 2 main functions: Sales and Customer Service. The dictionary not only defines the indicators, but also contains an explicit presentation of their calculation formula.

smartKPIs.com

The *smart* choice in performance management

Contains over 20,500 KPIs examples, including the ones covered in the KPI Dictionary. Specific KPI examples listed in the Dictionary can be searched by using the sk number. Alternatively, visitors can browse, save and export documented examples.

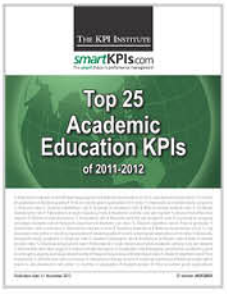
Top 25 KPIs Reports by Functional Area





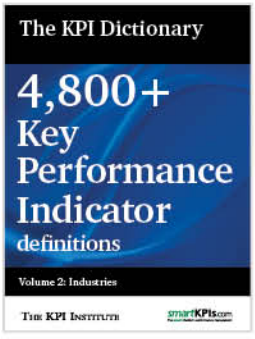


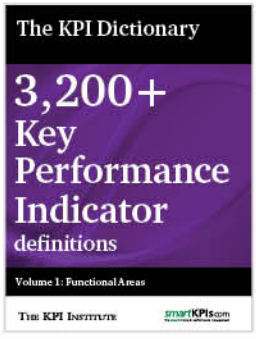
Top 25 KPIs Reports by Industry

















The KPI Institute offers a variety of in-depth publications that enable you to keep up to date with industry trends and leaders. Through its publications, it provides an overview of the performance management state of discipline and offers innovative tools, facilitating the implementation of performance management and measurement systems.

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