

## Welcome

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Whatever your business, having short-term and long-term goals is an important strategy for success. Your goals will help guide your business in the direction you want it to go.

When developing these goals, it's important to be specific.

Think about where you want to be in five years, three years, and next year. What changes need to be made to move in that direction?

Create a plan for implementing these changes, and don't forget the important component of regularly tracking progress. This is where Performance Measurement comes in to play.

Creating useful, meaningful, and relevant Performance Measures will give you a way to regularly check in on the progress toward your goals. Are you on track? Do you need to adjust? Your Performance Measures will let you know!



**CSA Event:** For more information and registration, visit [www.SCORE-sandiego.org](http://www.SCORE-sandiego.org)

SCORE San Diego  
Customer Service Excellence:  
**HOW TO WIN AND KEEP CUSTOMERS**  
Women's Networking Breakfast Program 8a-11a  
Seminar: 9:30a-10:15a  
September 17, 2010

## Use Performance Measures To Monitor Your Progress

Performance Measures (PMs) are quantifiable action items that include specific targets. Here are some generic examples.

- ◆ X% of revenue will be from return customers by X date.
- ◆ X% of customer calls will be answered within 30 seconds by X date.
- ◆ X% of returned customer satisfaction surveys will be above 90% by X date.

When establishing your PMs there are several factors to consider.

- ◆ Be specific. If your focus is on increasing the number of customer visits per year, is that new customers, return customers, or both? The more specific the measure, the easier it is to collect data and make adjustments.
- ◆ Solicit buy-in. Ensure the team impacted by the new PMs has a hand in their development and agrees to their importance.

## Five Suggestions To Get Started

1. Review your goals. Are they still relevant?
2. Do you have PMs in place? Are your PMs aligned your goals?
3. Involve the team. Does every person understand their contribution?
4. Pick 3-5 PMs that reflect your priorities.
5. Collect data and check progress regularly (monthly/quarterly) to allow prompt adjustments when needed.

Please contact us today to see how **CSA Inc** can help your organization maximize your customers' experience  
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*We look forward to hearing from you!*