Performance Measures: Target End-User Success

Nicole J. Burton
Usability Analyst

Financial Management Service
U.S. Department of the Treasury
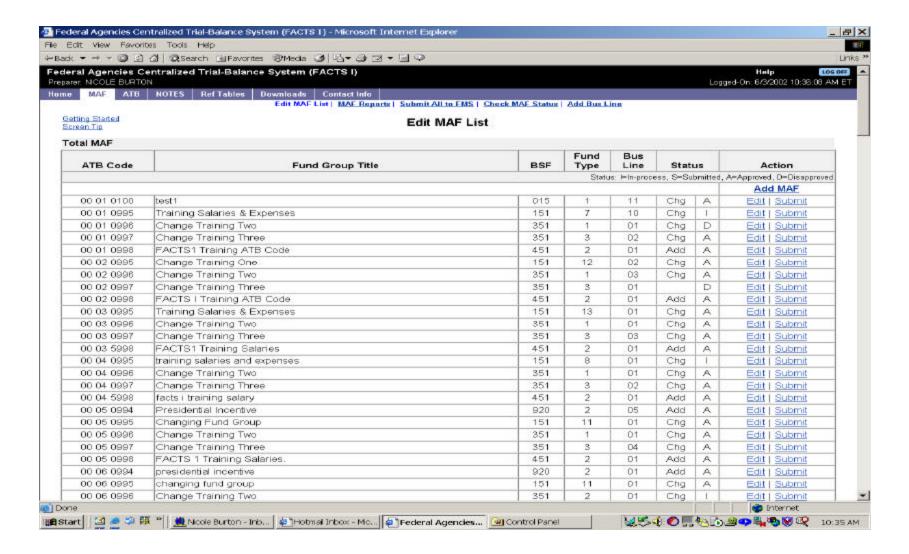
Nicole.Burton@fms.treas.gov

Federal Agencies Centralized Trial-Balance System (FACTS I)

FACTS I

- Supports preparation of the *Financial Report of the U.S. Government*

- Used by 200+ federal agency accountants to report data to Treasury:

  - Define the fund groups for reporting (Master Appropriation File, MAF)

  - Transmit USSGL adjusted trial (ATB)

  - Transmit NOTES financial and non-financial data

Federal Agencies Centralized Trial-Balance System (FACTS I)

What are Performance Measures / Usability Goals?
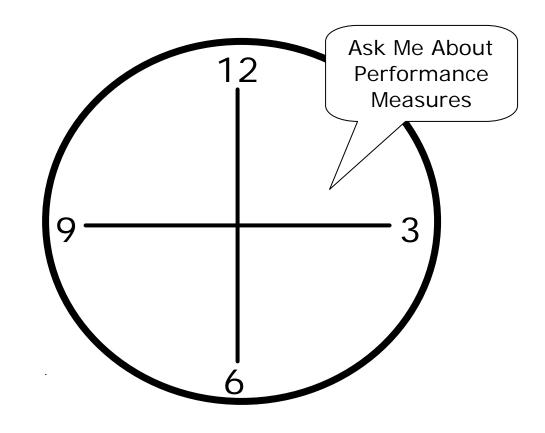
Performance Measures *quantify* Business Goals

FACTS I Business Goal

"The primary reason for the FACTS I development effort is the contractual requirement to depart GOALS [legacy platform] by August 2001. The new development is not viewed as a conversion but rather a re-engineered system accompanied by Business and Functional Requirements. While much of the core functionality will remain unchanged (MAF, ATB, NOTES), the implementation will reflect new technology."

ON TIME
ON BUDGET
WOWS END USERS

Nicole Burton, 10.28.2003

When Do You Create Performance Measures?

- ➢ Early—Establish Performance Measures in 12-3 quadrant

- ➢ If not, derailment begins

12

9 ___ **3**

6

Ask Me About Performance Measures

Thanks to The Usability Group for the clock & quadrant metaphor, www.usability.com

How Do You Create Performance Measures?

➤Gather customer & task data

➤Target core customers & core tasks

➤Work with operations staff, "guesstimate" metrics for Usefulness, Ease of Use, Ease of Learning, and Satisfaction

Example:

FACTS I Preparer (agency accountant) – Ease of Use Measures

➤ Add or Edit MAF data: no more than 1 minute per MAF record

➤ Submit ATB bulk file: no more than 10 minutes and 2 attempts

Nicole Burton, 10.28.2003

How Do You Know When the Design is Right?

➤ Conduct timed usability tests against performance measures

Step	Task/Comments	Metrics Goal/Actual		Severity	Proposed Solutions	Action
1	Login: Users continually expect the cursor to be focused on the Login field when they are presented with the screen (DG)	1 min	45 secs	3	Not a severe problem but a continuing annoyance	Next year
4	Nav Home Page: Clicked on MAF window dates before MAF Tab (DG)	-	-	2	Make the main menu buttons look more button-like, add separators	ER (cosmetic)
6	Add MAF: Didn't see **Add MAF** link; clicked on **Add BL** link (DG)(JH)	1 min	5 min+	1	Replace **Add BL** with **Add MAF;** make **Add BL** a link on individual Edit screens.	ER
6	Check MAF Status: "What does Chg/Rev mean in the Status column? (JH) (I didn't know either)	-	-	3	Suggest removing Chg/Rev; may be old clutter.	ER (cosmetic)

➤ Correct major problems

➤ Conduct post-implementation studies
Example: "30% increase in productivity between FY2000 (legacy) and FY2001 (new system) as measured by Federal agency submissions by completion date"

Performance Measures Summary

➤ **Target core customers & core tasks**

➤ **Create narrow, measurable metrics**

➤ **Map performance measures to business goals**

ON TIME
ON BUDGET
WOWS END USERS