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**Service excellence — Measuring  
service excellence performance**

*Excellence de service — Conception d'un système de mesure et  
d'évaluation de l'excellence de service*

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## Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see [www.iso.org/directives](http://www.iso.org/directives)).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see [www.iso.org/patents](http://www.iso.org/patents)).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

This document was prepared by Technical Committee ISO/TC 312, *Excellence in service*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at [www.iso.org/members.html](http://www.iso.org/members.html).

## Introduction

In a world of change and high competition, organizations are confronted with permanently growing and evolving customer expectations. To be successful in a sustainable way, organizations must deliver excellent service and promote outstanding customer experiences to delight their customers. This is the main objective of service excellence. Service excellence is one of the main prerequisites to organizational success and becoming a market leader. Organizations should possess strategies, processes, technologies, tools, systems, staff and organizational structures enabling the management of current and changing customer needs and expectations.

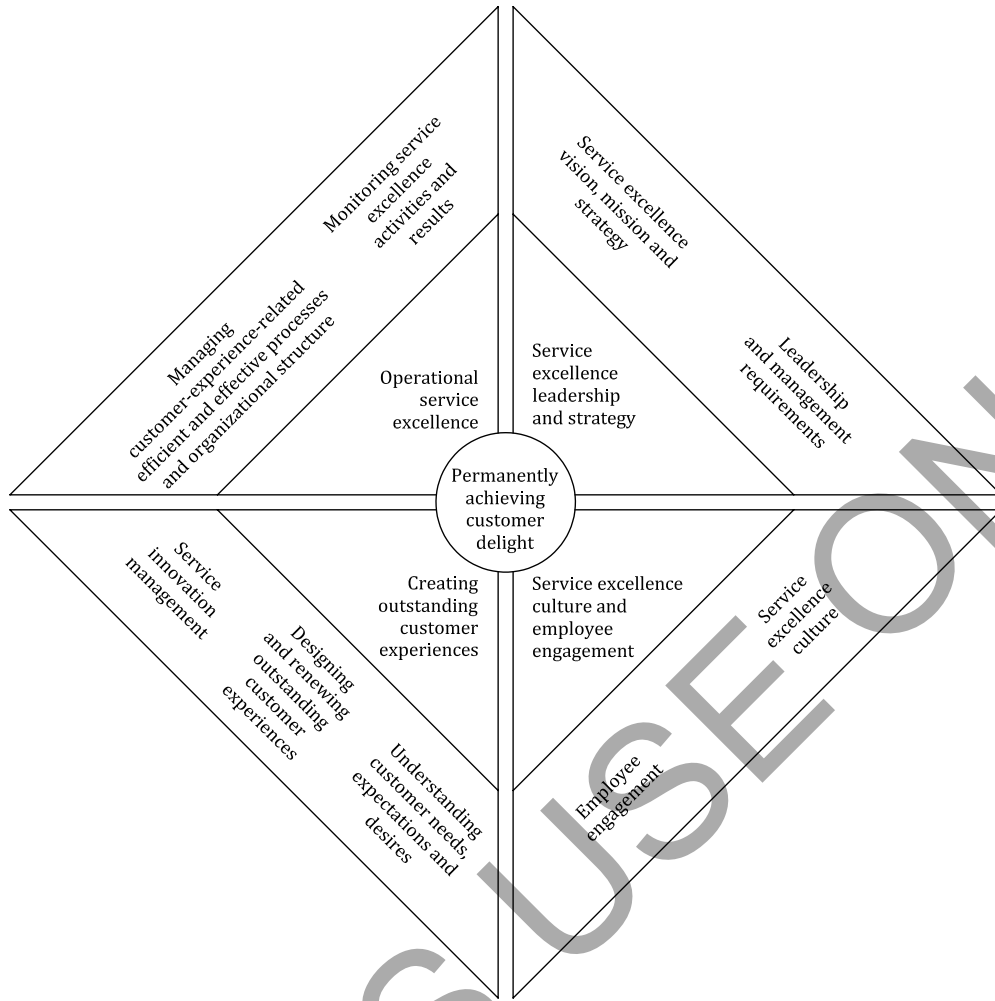
Organizations should develop, implement and manage service excellence initiatives. This will lead to outstanding customer experiences, cost effectiveness and improved organizational efficiency.

Along the entire service value chain, organizations, including suppliers, outsourcers and other partners, should measure service excellence performance.

This document provides a set of approaches that can be used to measure service excellence performance, particularly those factors with the greatest impact on improving outstanding customer experiences and customer delight.

To determine that service excellence is effective it is imperative that the performance measurement system is aligned with the organization's service excellence model. This ensures that measuring processes are fit for their intended use and allows service excellence activities to be monitored and measured against the service excellence objectives.

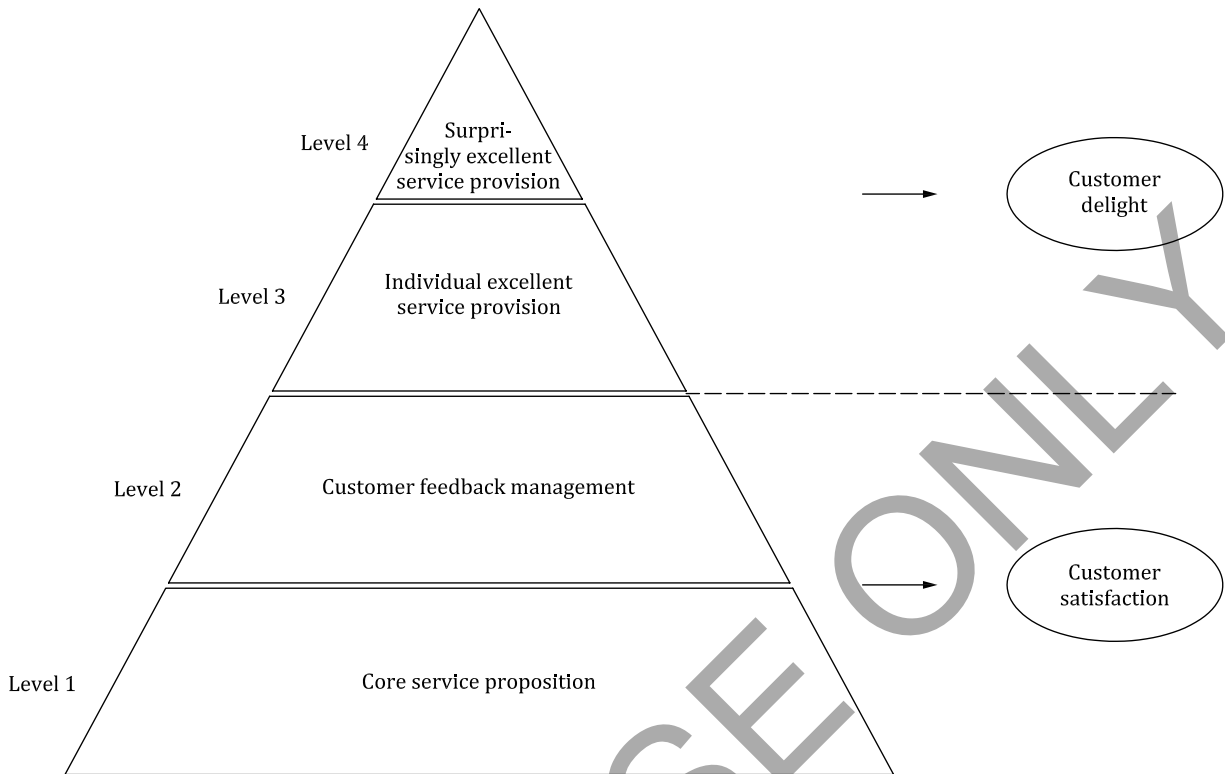
ISO 23592 specifies the service excellence terminology, principles and model to achieve outstanding customer experience and sustainable customer delight. Consequently, the corresponding measurement system should relate to all the four dimensions and nine elements of the service excellence model (see [Figure 1](#)).



**Figure 1 — Service excellence model**

The clauses in this document elaborate on the requirements of the element “Monitoring service excellence activities and results” within the dimension “Operational service excellence” of the service excellence model located in ISO 23592.

While all four dimensions of the service excellence model should be measured, measurement is focused on the upper two levels of the service excellence pyramid (see [Figure 2](#)), specifically, the “individual excellent service provision” (Level 3) and the “surprisingly excellent service provision” (Level 4) that contribute to customer delight and, subsequently, improved financial or non-financial results.



**Figure 2 — Service excellence pyramid**

ISO 23592 requires that the organization develops and systematically uses a set of internal and external metrics focused on all elements of the service excellence model and measures the successful achievement of levels three and four of the pyramid.

It is important to note the differences in measures required for customer satisfaction (levels 1 and 2) and those required for customer delight (levels 3 and 4). Customer delight cannot be achieved without the foundations of customer satisfaction. Due to these interdependencies, it is incumbent upon an organization to ensure the selection of the appropriate measures that distinguish between customer satisfaction and delight.

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# Service excellence — Measuring service excellence performance

## 1 Scope

This document specifies metrics and methods of measuring service excellence performance.

## 2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 23592, *Service excellence — Principles and model*

## 3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 23592 and the following apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <https://www.electropedia.org/>

### 3.1

#### **benchmark**

single value representing an accepted reference value derived either from comparisons among participants or from literature, used for orientation

[SOURCE: ISO 24523:2017, 3.2, modified — Notes to entry removed.]

### 3.2

#### **measurement**

process to determine a value

[SOURCE: ISO 9000:2015, 3.11.4]

### 3.3

#### **performance measurement system**

process of designing, monitoring and controlling the performance of an activity/enterprise using agreed indicators that encourage a business to meet its strategic objectives

[SOURCE: EN 14943:2005, modified — Term revised.]

### 3.4

#### **service excellence measurement system**

performance measurement system for service excellence

### 3.5

#### **customer loyalty**

customer's intention and behaviour to recommend, repeat purchase and cross-product purchase an organization's products or services

### 3.6

#### **qualitative research**

analysis of motivations, patterns of thought, opinion, attitude, assessment or behaviour, via research techniques such as focus groups, depth interviews, discourse content analysis and qualitative [observational research](#)

[SOURCE: ISO 20252:2019, 3.72]

### 3.7

#### **quantitative research**

numerical measurement of observations via research techniques such as questionnaires, opinion polls, surveys and experimental research

[SOURCE: ISO 20252:2019, 3.73]

### 3.8

#### **performance**

measurable result

[SOURCE: ISO 9000:2015, 3.7.8, modified — Notes to entry removed.]

### 3.9

#### **key performance indicator**

parameter, or a value derived from parameters, which provides information about performance

[SOURCE: ISO 24523:2017, 3.13, modified — Term revised and Notes to entry removed.]

### 3.10

#### **performance indicator system**

controlled compilation of key performance indicators which are related to each other either logically or mathematically and which, overall, are aimed at a common, superior objective or benchmarking object

[SOURCE: ISO 24523:2017, 3.15, modified — Definition revised.]

## 4 Guiding principles

### 4.1 General

Guiding principles are the ethical, legal and moral obligations related to service excellence measurements involving both customers and staff. They are independent of an organization's goals, strategies and activities, and form a special part of service excellence culture.

### 4.2 Organizational commitment

Management should use the relevant service excellence metrics to monitor, improve and innovate in all parts of the organization.

### 4.3 Research and organizational ethics

Customer experience and service excellence research should comply with guidelines provided by national or professional research ethics organizations.

NOTE 1 Examples include the European Union's *Ethics in Social Sciences and Humanities*,<sup>[3]</sup> the *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans*,<sup>[10]</sup> the *ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analytics*<sup>[4]</sup> and standards such as ISO 20252.

#### 4.4 Data management and analysis integrity

All service excellence measurements should comply with internal and external audit requirements. There should be systematic, independent and documented processes for obtaining evidence to allow it to be evaluated objectively to determine the extent to which audit criteria are fulfilled.

#### 4.5 Transparency

The organization should ensure that adequate service excellence performance information, e.g. customer delight score, is communicated to customers, personnel and other relevant interested parties, as appropriate.

#### 4.6 Alignment

The service excellence measurement system should be aligned with the service excellence vision, objectives, strategies and operational processes of partners and mutual interests of the stakeholders, see ISO 44001.

#### 4.7 Self-organizing teams

Self-organizing teams can set their own metrics on how they achieve their key results to impact service excellence performance.

#### 4.8 Continuous reflection, evaluation and improvement

The measurement of service excellence should be evaluated continually and improved where possible. The internal evaluation process should ensure that the service excellence measurement system collects the right data and helps achieve the desired outcomes or results.

### 5 Measurement system for service excellence performance

#### 5.1 General

Service excellence performance can only be measured when the service excellence model has been adapted and implemented within an organization. The requirements for designing, producing and delivering excellent service are continuously changing. Therefore, service excellence activities should be measured on a regular basis to monitor service excellence performance against service excellence objectives. An increasingly used method of establishing and tracking objectives and results is the use of objectives and key results (OKR).<sup>[1]</sup> This general approach can be applied as a framework to measuring service excellence performance and provides a flexible method of ensuring required documentation and measurement models are established and implemented.

Upon establishing the service excellence mission statement, objectives and associated performance measurement criteria, team OKR may be derived.

#### 5.2 Framework for measuring service excellence performance

To support the service excellence model, the service excellence measurement system should include:

- the service excellence mission statement;
- performance measurement indicators establishing the extent to which a service excellence mission and core objectives have been achieved, which can be measured in the short, medium and long term;
- a data collection system enabling the establishment of baseline and performance metrics in operational service excellence;

- a process of re-examination of service excellence performance and establishing improvement interventions.

The service excellence model in ISO 23592 (see [Figure 1](#)) and its adaptation and implementation within an organization is the basis for the development of a service excellence performance measurement system.

Prior to measuring service excellence performance, it is necessary to define the measurement system parameters such as responsibilities, resources and time frame.

The organization should clearly define the mission statement and the purpose, objectives and expected key results for the service excellence measurement system. The purpose and objectives outline what, when, how and from whom data are to be collected for measurement. Moreover, it is necessary to determine how those data can be used to improve upon performance and if any financial or human resource allocations are required for successful implementation. The framework to measure service excellence performance should be supported by all managers, staff and stakeholders enabling the planning, design, development, operation, maintenance and improvement of processes for measuring service excellence performance.

The mission statement should be clear regarding the ultimate outcome of what service excellence should achieve, specifically pertaining to increased levels of customer loyalty and its relationship with better key financial results.

In alignment with an organization's business plan, medium-term goals of service excellence should focus on key results achievable within a given time frame, generally a few months to a year. These goals and results should be clearly aligned with the organizational mission statement and staff and leadership activities to improve service excellence activities.

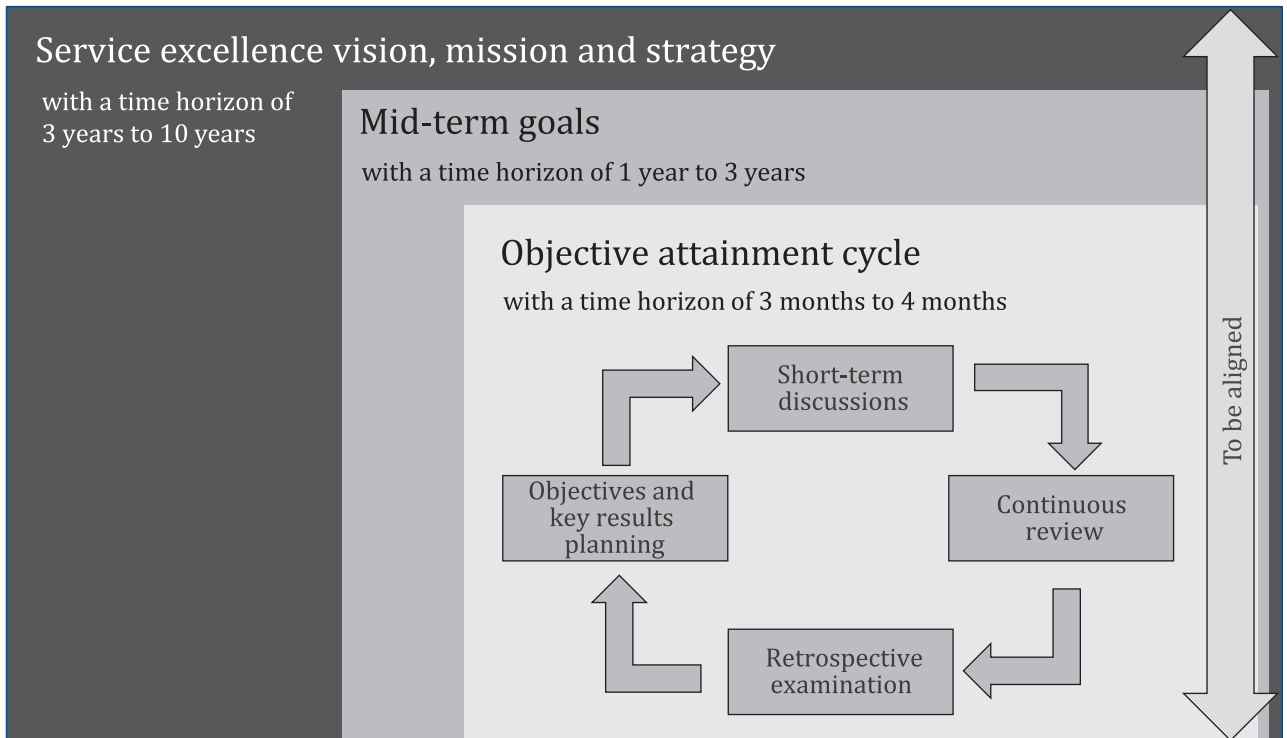
Service excellence objectives should be:

- aligned with an organizational business plan;
- qualitative and higher-level;
- achievable in a specified time frame;
- balanced between inspiration and being achievable;
- aligned with the service excellence vision.

Moreover, company and team objectives on service excellence and key results should be:

- specific;
- measurable;
- accepted;
- ambitious but achievable;
- aligned;
- realistic;
- time specific.

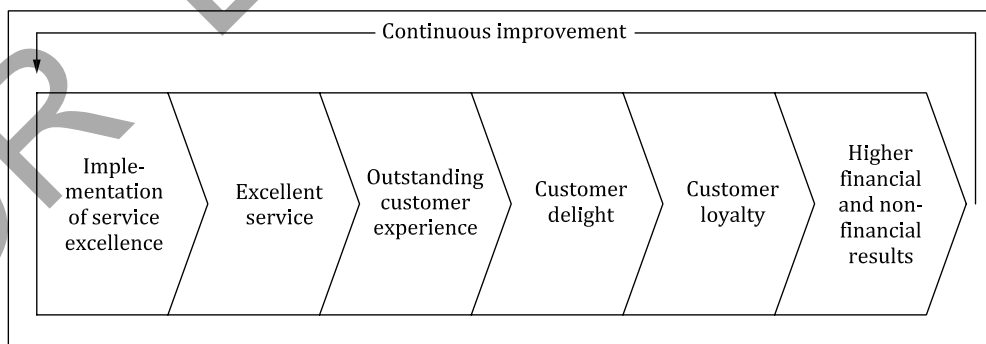
[Figure 3](#) shows the service excellence measurement framework from a process perspective.



**Figure 3 — Framework for measuring service excellence performance**

Having established the service excellence vision, mission and strategy and defined the associated medium-term goals, an objective attainment cycle should be established. This should include planning, short-term discussions, reviews and a retrospective examination leading to a continuous process of tracking the achievement of service excellence outcome and measuring service excellence performance, as outlined in [Figure 4](#).

Planning, design and development, includes determining the methods of implementations and required resource allocations. Operation includes identifying stakeholder expectations and the gathering and analysis of measurement data to inform organizational change. Maintenance and improvement include the review, evaluation and continual improvement of service excellence measurement processes.



**Figure 4 — The service excellence effect chain**

An appropriate practice for supporting this approach is to define a specialist in using this performance measurement system for service excellence. This specialist should be allocated for the development and monitoring of these activities, focusing on coaching, facilitating, being an agent of change and acting as a champion of the service excellence implementation.

### 5.3 Benefits and varieties of metrics for measuring service excellence performance

Establishing and maintaining service excellence operations is a continuous process that requires investment in people, infrastructure and research. The organization can benefit from this investment in several ways, including (see ISO 23592):

- competitive differentiation;
- higher customer centricity reputation;
- customer preference;
- establishment and strengthening of long-term customer relationships (leading to a greater propensity to remain, recommend and repurchase, and thereby reducing the churn rate);
- cost-saving potential in the long term (e.g. lower failure costs, easier sale conversions and reduced advertising expenses for acquiring new customers);
- an excellent employer brand (leading to improved recruitment opportunities, higher levels of staff engagement and improved employee retention);
- improved customer co-operation and engagement;
- brand strengths, including positive brand awareness;
- help to manage networks with subcontractors;
- improved efficiency;
- implementation of agility.

These benefits can be explicitly defined as service excellence objectives. Metrics should be used to track if the desired benefits and objectives are achieved and to what extent.

To properly measure customer delight, loyalty and their association with improved key financial results, the organization should identify existing and additionally required measures that can be directly taken as indicators for service excellence performance such as churn rates, call wait times, website/app failures, service interruptions. Additional data collection may be required that are not inherent in organizational data collection, such as the Net Promoter Score<sup>SM</sup> (NPS<sup>®</sup>),<sup>1,2)</sup> Customer Satisfaction Index (CSI), employee and leadership engagement. It should be emphasized that certain additional measures are specific to simple customer satisfaction and customer delight. Care should be given when selecting these measures.

The organization should assess the metrics measuring the effect(s) of service excellence as indicators for service excellence performance. Furthermore, the organization should define which metrics are used when directly measuring the necessary capabilities of an organization needed to deliver excellent services and achieve customer delight (see ISO 23592, Figure 3).

Appropriate range of metrics can include:

- outcome metrics about customer experiences including perceptions of specific transactions and the entire relationship, e.g. scores and indices related to customer experience, customer effort, customer satisfaction, customer delight, customer happiness and customer engagement;

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1) Net Promoter<sup>®</sup>, NPS<sup>®</sup>, NPS Prism<sup>®</sup> and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld. Net Promoter Score<sup>SM</sup> and Net Promoter System<sup>SM</sup> are service marks of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld.

2) NPS is an example of a suitable product available commercially. This information is given for the convenience of users of this document and does not constitute an endorsement by ISO of the product named. Equivalent products may be used if they can be shown to lead to the same results.

- intended and actual customer behaviours, such as advocacy, retention or churn, share of wallet and financial results such as customer equity;
- metrics about employee perceptions and behaviours such as employee involvement, motivation and engagement;
- metrics about the operational performance such as communication channels, customer journeys and internal (support) processes;
- metrics around reputation and branding;
- metrics around learning, improvements and innovation of the organization.

#### 5.4 Selection of appropriate measurement methods and tools

The organization should use measurement tools on a continuous and objective basis, including:

- use measurements from the best performing organizations to create benchmarks;
- learn from negative and positive service excellence related outcomes.

Appropriate practices for implementation can include:

- use of tools to measure perceptions of stakeholders such as qualitative and quantitative research surveys or interviews;
- use of tools to measure service levels, empathy and process measures such as mystery shopping;
- use of data sources e.g. customer relationship management (CRM) database to measure actual behaviours of customers;
- monitoring of social media.

#### 5.5 Analyses for measuring service excellence performance

The organization should understand the most important determinants or metrics of the elements of the service excellence effect chain (outlined in [Figure 4](#)) and their relationships.

Examples of the causal relationships are between:

- employee engagement and customer delight (and vice versa);
- customer perceptions, attitudes and actual behaviours and/or self-reported behaviours along the customer journeys;
- investments in service excellence and actual returns.

Based on identified causal relationships between service excellence activities and ultimate organizational outcomes, the organization should use a set of input, throughput, output and outcome metrics to manage and improve the service excellence concept as identified in the activities for measuring service excellence performance and include the integration of these metrics into a service excellence scorecard.

The association with identified OKRs should also establish measurable relationships with financial outcomes as outlined in [Figure 4](#). OKRs clearly articulate the overall objectives expected to be achieved by an organization and includes the key results as quantitative research metrics that measure the achievement of a given objective in a defined time frame.

#### 5.6 Use of measured results

All managers should use these metrics to monitor, improve and innovate in all parts of the organization. The results should be used for service excellence training programmes.

Metrics should be used to support and foster the positive service excellence culture of the organization and develop good practices into excellent practices.

The organization should:

- share the results with all relevant stakeholders on a transparent and frequent basis;
- use the metrics in all parts and on all levels of the organization to determine goals, performance and, where possible, improvements;
- capture qualitative data such as the experiences and stories of customers and employees in addition to quantitative data;
- handle the customer data in a safe way.

Appropriate practices for implementation can include:

- visualization of results using dashboards, performance walls, barometers and narrowcasting on video screens;
- developing a wall of fame to foster a positive culture;
- use of results for appraisal and incentives for employees, teams and managers;
- use of feedback to each group of stakeholders (identifying clear communication channels to each one);
- reporting service excellence related key performance indicators (KPIs) in corporate reporting format;
- use of graphical methods of displaying multidimensional or multivariate data (e.g. radar charts, scatterplot matrix, 3D scatter plots) as well as customer interactions (e.g. via customer journey touch point mapping);
- use of toolboxes to strategically manage customer experiences by optimizing and synchronizing touchpoints [e.g. customer experience management (CEM/CXM)];
- provision of shared and consolidated databases (channel-independent) which allows crowd sharing between the organization and customers;
- use of digital devices that recognize individuals and offer personalized information and options.

## 6 Measuring service excellence leadership and strategy

### 6.1 General

The measurement of service excellence leadership and strategy should focus on the following two dimensions: “service excellence vision, mission and strategy” and “leadership and management requirements”. Leaders inspire people to focus on customers, staff and stakeholders, to achieve ambitious outcomes, e.g. excellent service, outstanding customer experiences and customer delight. Furthermore, effective leadership and strategy clearly articulate the service excellence vision, mission, strategy, goals and objectives of an organization, whether they be short- or long-term in nature.

Organizations should measure service excellence leadership and strategy to improve and enhance organizational strategies and policies, ensuring staff and stakeholders are enabled to achieve and exceed their OKRs.

As discussed in [5.3](#), the application of OKR logic should be applied in the measurement of service excellence leadership and strategy.



## 6.2 Framework for measuring service excellence leadership and strategy

Service excellence leadership should be of quality, be flexible and adaptive and open to experimentation to succeed with these policies and strategies. Moreover, service excellence leadership should exemplify the vision, change and transformation they wish to see achieved within an organization.

Leaders constantly role-model organizational principles and create a supportive environment to live these principles. Service excellence leadership should include:

- systematic approaches to measurement and the use of these measurements to improve service excellence performance;
- a documented history of service excellence performance improvement;
- an ability to share and communicate the results of measurements to improve organizational performance across departments;
- the use of measurement results to inform organizational best practices.

A framework for measuring service excellence leadership and strategy should be organized around several different dimensions, specifically:

- a relationship with people – mentoring and facilitation;
- leading change – innovation and brokering ideas and problem solving;
- managing service-excellence-related processes – monitoring and coordinating activities that clarify policies, projects and activities;
- producing results – producing and directing activities, priorities and the communication of service excellence vision, plans and priorities;
- forecasting and planning – resource planning and scheduling to meet customers' fluctuating service demands.

## 6.3 Metrics for measuring service excellence leadership and strategy

There are several applicable methods for measuring service excellence in leadership and strategy, including:

- balanced scorecard – a measure of leadership performance topics of customer orientation, financial perspectives, the accomplishment of objectives and goals and organizational advancement, consisting of a mixture of financial and non-financial measures.
- the Leadership Excellence Index – a quantitative research method examining the performance of leadership in sharing values, developing and communicating vision, defining the organizational mission and selecting and implementing strategies. This index focuses on organizational values, vision, mission, strategy and key issues.

When measuring leadership in service excellence, like any form of leadership measurement, leadership should be evaluated and measured on criteria that support overall service excellence.

# 7 Measuring service excellence culture and employee engagement

## 7.1 General

Employee engagement incorporates the involvement of staff to be empowered in the improvement of operations and ensuring that staff front-line experiences and recommendations are incorporated into the service excellence culture. It is central to the success of any service excellence programme and broader organization.

Organizations should measure service excellence culture and employee engagement to monitor if the organization is on the right track to create, stimulate and maintain shared values, beliefs and practices to create outstanding customer experiences.

Additionally, staff should have clear targets to determine personal and company performance, with these targets having clear relationships with front-line activities and overall corporate policy pertaining to the impact of service excellence on the mission statement, strategy, goals and objectives of a respective organization.

As discussed in 5.3, the OKR logic should be applied in the measurement of service excellence culture and employee engagement.

### 7.2 Metrics for measuring service excellence culture and employee engagement

A measurement system of service excellence culture and employee engagement should include:

- the extent staff or people achieve outstanding results that meet or exceed their expectations;
- absenteeism and employee turnover rates and overall target achievement of employees with performance assessments;
- measures of employee delight and engagement [e.g. The Intellectual, Social, Affective (ISA) Engagement Scale,<sup>[9]</sup> Utrecht Work Engagement Scale (UWES),<sup>[8]</sup> Employee NPS];
- internal corporate measures of the concordance between employee attitudes and corporate policies.

Tools such as the UWES measure work engagement and workaholism, burn-out, causes of work engagement, consequences of work engagement, and engagement and motivation. The ISA focuses on three domains: intellectual engagement (working hard, concentration, attention), social engagement (shared values, goals and attitudes of colleagues) and effective engagement (positivity, energy and enthusiasm pertaining to work).

## 8 Measuring outstanding customer experiences

### 8.1 General

The measurement of outstanding customer experiences should focus on understanding customer needs, expectations and desires, designing and renewing outstanding customer experiences and service innovation management. To achieve this, a robust data collection method is required ranging from archival data collection within a CRM system to additional data collection and research examining the voices and experiences of customers.

Data points represent when and where elicited emotional experiences are observed and monitored along customer journeys. Data points, for example, capture information about behaviours and responses of customers in customer journeys as well as those of service providers in the service delivery process.

Organizations should identify such data points that lead to customer delight. Data points enable customer feedback, service personalization, adoption, improvement and learning in service delivery processes and organizational management. To collect and provide sufficient data efficiently, organizations should plan to process data points for the entire customer journey and in the service delivery process.

As discussed in 5.3, the application of OKR logic should be applied in the measurement of outstanding customer experience.

### 8.2 Framework for measuring outstanding customer experiences

Effective measures of customer experiences should examine customer interactions and opinions and be aligned with the policies and strategies of an organization. For instance, one metric may be appropriate

for a specific customer journey or touch point but not for another, with some customer experiences having relationships with achieving organizational policies and strategies. Understanding the specific customer channel should aid in defining what are the appropriate measurement tools for this level of interaction and their contribution to service excellence achievement.

Whatever the measurement tools selected for a respective interaction, these measurements should be specific, relevant, measurable, ethical and reportable. [Table 1](#) examines the process of creating a system of measuring customer experience. It is essential that all questions are answered from the perspective of an organization’s service excellence strategies and policies to ensure that results yield actionable insights to achieve outstanding customer experience.

**Table 1 — Questions and answers on measuring outstanding customer experience**

Questions	Answers
What do you want to measure? What is your research question?	Customer delight, likelihood of recommendation, repurchase behaviour, etc.
Why do you want to measure this? How does this research question relate to your organizational priorities, mission and strategies?	All measurements should contribute to an ultimate outcome – decreased churn, increased revenue, increased customer satisfaction, delight, loyalty, recommendations.
What are the appropriate measures and outcomes for this research?	Once it has been determined what and why you want to measure an aspect of outstanding customer experience, you should determine the appropriate measurement and outcome metrics [customer satisfaction score (CSAT), NPS, churn, delight].  These measures should be actionable for staff so that results may be monitored to determine improvements.
What methodology to use?	Questionnaires, focus groups, key informant interviews, longitudinal, experimental design, archival data, multi-methodology, etc.
What analyses are appropriate to answer the research questions?	Quantitative (for use in statistical analysis, text analytics, etc.) vs. qualitative research (focus groups, key informant interviews, etc.)  Surveys (online or telephone) vs. experimental design vs. the use of archival data sources such as an organization’s CRM system.
How will you share these results?	Customer experiences can only improve when organizations have access to, understand and use research findings. It is imperative that results be distributed for use based on the teams responsible for the organizational priorities and strategies previously identified.

Once all questions have been answered, a method of measuring outstanding customer experience should be implemented referring to results that support overall service excellence.

An organization should identify what aspects of outstanding customer experience should be measured, aligned with its overall organizational policies, strategies and priorities.

[Table 2](#) outlines common customer experiences that contribute to higher levels of customer satisfaction and delight.

**Table 2 — What to measure**

General customer experiences	The satisfaction or delight that customers report of their customer experiences which is independent of any specific experience.
Customer journeys	The experiences of customers through various <a href="#">contact points</a> with a product, brand or organization.
Customer touchpoint	Any time a customer comes into contact with an organization – before, during or after becoming a customer.
Customer perception	The perceptions customers have of an organization, regardless of contact type or channel.

**8.3 Metrics for measuring outstanding customer experiences**

Depending on the customer experiences of interest, several measures exist to understand outstanding customer experiences on any given interaction or experience with an organization. [Table 3](#) outlines some of the most common measures, what the statements are and the focus of the customer experience. [Table 3](#) is only a reference of some available measures and is not an exhaustive list. Every organization should determine what available (or self-designed) measures are appropriate for their given business sector, customer type or organizational size.

**Table 3 — Example measures of outstanding customer experience**

Measure	Question	Type of Measurement	Focus
The NPS	On a scale of 0–10 how likely would it be for you to recommend [company name] to a friend or colleague?	The NPS is equal to the percentage of detractors (respondents that gave a 0–6) subtracted from the percentage of promoters (respondents that gave a 9–10).	Multi-channel, interaction.
Customer delight (CD)	The organization was able to delight me.	From “strongly disagree” to “strongly agree”	Service specific, tracking and relevant benchmarking.
CSI	Models of many CSIs include questions on factors of customer loyalty affected by customer satisfaction (e.g. intention for repurchase, price acceptance for repurchase, frequency of use and extensive use of the product or service).	An ordinal scale answer to quantify the relationships between the factors that influence the customer loyalty in the model.	Measures each relevant characteristic for customer satisfaction and total product or service, measuring the expectations of customers and their satisfaction.
Customer effort score (CES)	The organization made it easy for me to handle my issue.	From “strongly disagree” to “strongly agree”.	Interaction specific, tracking and relevant benchmarking.

Measures of outstanding customer experience are largely the outcome measure of interest when measuring service excellence performance results from a customer’s perspective, specifically the causal relationship between customer experience activities and improved customer delight.

Enhancing customer experience and service excellence improves outcome measures (e.g. customer delight, recommendation, decreased effort) and requires additional data collection and analysis to determine where customer experience activities should focus.

Some additional customer experience metrics should be considered along with standard measures:

- churn rates or intention;
- repeat purchase behaviour;
- additional product or service purchase behaviour;
- cost to service;
- data contained in an organizational CRM (customer complaint resolution, time to service);
- customer feedback or compliments data.

Some organizational data may already exist from previous research, academic literature, or within CRM tools. However, an organization may require additional data that may not be possible to collect internally or are not presently collected.

#### 8.4 Methods for collecting outstanding customer experiences metrics

The types and methods of data collection restricts the ability to answer specific research questions with multiple data types and collections required to answer research questions. For instance, if customer churn is of interest but focus groups are conducted, mathematical models will not be able to be produced. However, focus groups may provide valuable individual or group insights as to individual reasoning for churn. The following methods of data collection can be used to collect customer feedback on their experience:

- in-app questionnaires;
- e-mail;
- computer-assisted telephone interview (CATI);
- computer-assisted web interview (CAWI);
- online panel;
- key informant interviews;
- focus groups;
- literature reviews and external data sources, such as customer review websites;
- video (e.g. webcam footage, mobile task apps);
- archival data, such as a CRM.

An organization should identify what data already exist and what needs to be collected additionally. It can then decide how best to analyse the data (quantitative and/or qualitative).

Depending on the nature of the research question(s), certain data collection and analyses will be more appropriate or even possible, than others. It is imperative to understand how data are to be analysed when collecting or using data. Therefore, it is imperative to understand the pros and cons of applying certain analytic methods to certain data types and how those data are to be analysed.

#### 8.5 Analyses for measuring outstanding customer experiences

Qualitative research data provides organizations with an understanding of individual customers based on their views and perceptions, permitting a rich source of relatively unstructured information, and is helpful in exploring new areas previously unresearched or requiring additional exploratory research. This includes key informant interviews, focus groups, photos and journals, to derive information to inform customer experience measurement.

Quantitative research data allows for broader generalizations and concrete measures. If an organization is interested in understanding what customer experiences contribute to a higher NPS or CD score, regression modelling (e.g. linear, logistic regression) is required, while other regression models enable an understanding in predicting churn (Cox proportional hazard modelling or survival analysis). [Table 4](#) outlines different general methods of qualitative and quantitative research data analysis.

**Table 4 — Methods of data analysis**

Qualitative research data analysis	Quantitative research data analysis
Content analysis	Inferential statistics (taking a sample and attempting to generalize these results to the population).
Narrative analysis	Descriptive statistics (examines data to identify patterns and describes overall characteristics based on those customers in the sample).
Discourse analysis	
Framework analysis	

This exemplifies the essential nature of defining customer experience outcome measures and how those data are represented, as asking “are you delighted with (X customer experience), yes or no?” should be analysed and interpreted differently than “to what extent were you delighted with (X customer experience) on a scale of one to seven?”

Research findings and results cannot exist in a vacuum and should be used to inform service excellence performance and customer experience strategies.

## 9 Measuring operational service excellence performance

### 9.1 General

The measurement of operational service excellence performance focuses on effective and efficient customer experience processes, organizational structures, policies, plans, objectives and processes, targeting the ultimate goals and objectives of a service excellence programme and organization. Additionally, organizational leadership incorporates these policies across an organization while supporting and rewarding staff in the achievement of these policies.

Therefore, an organization should establish a set of criteria to determine overall operational or business excellence performance pertaining to operational service excellence performance, focusing on objectives that enable the quantification of performance.

As discussed in [5.3](#), the application of OKR logic should be applied in the measurement of service excellence performance.

### 9.2 Framework for measuring operational service excellence performance

The following outlines the three core requirements for an operational excellence measurement framework:

- 1) The creation of an organizational assessment model of operational service excellence performance, consisting of discrete measurement criteria such as human resource, management and leadership strategies.
- 2) Incorporation of measurements allowing organizational agility focusing on key performance indicators including human and financial resources, customers and all stakeholders.

These measurements should include representation of all relevant staff and stakeholders in the development of these measures.

- 3) Models of association between operational service excellence activities and expected effectiveness or impacts.

As per these requirements, three core inquiries should be made:

- What gaps exist between ideal performance and the financial resources available or organizational commitment to closing those gaps?
- What are the priorities of an organization that can direct operational service excellence improvement interventions?
- What is the organizational maturity of an organization in each area of measurement interest?

### 9.3 Metrics for measuring operational service excellence performance

While metrics of measuring operational service excellence performance need to be tailored to an organization's specific requirements, general guidelines of these metrics and their use should be considered. These guidelines refer to the following areas:

- Measurement and use of human and financial resource management: Human and financial resource management may be measured based on overall planning, management of those resources, with objectives of improving performance of these operations and staff skills in executing these operations.
- Measurement and use of strategy: Flowing from improved innovation, strategy metrics require reviews of stakeholder engagement, policy development and communication, ensuring that strategy and overall innovation incorporates continual enhancement of customers, organizations and stakeholder engagement.
- Measurement and use of customer results: Specific customer results are integral in the measurement of operational service excellence performance, requiring measures that customers experience and perceive improvements of operational service excellence performance. These can be measured and benchmarked against those measures outlined in [Clause 9](#). It is important to note that these measures should include external comparisons to that of competition and the overall market regarding customer engagement activities.
- Measurement and use of external benchmarks: With some degree of overlap with other measures, it is nonetheless important to ensure that the operational service excellence performance measures of a company not be viewed in isolation and be referenced with competition. Additionally, the broader market, both domestically and internationally, should be examined. External benchmarks allow an organization to understand what is possible and what is best or worst in class among its peers. Lastly, international comparisons in different markets are essential in providing an additional reference for measuring activities and interventions pertaining to operational service excellence performance overall.
- Using internal data such as unified communications, contact centre technology and related data sources permitting measurement.

Measurement tools may include one or several of the above, but caution should be exercised and not limited to these tools. The decision of the proper measurement tools should be based on the operational outcomes discussed in [9.2](#) and should be tailored to the specific requirements of an organization.

Metrics required for the measurement of operational service excellence performance include the existence of core documentation, similar to those outlined in [Clause 6](#), and include the creation and use of mission, vision, goal, values and culture statements of an organization and the abilities of leadership to execute these statements.

It is essential that the measures and frameworks outlined in [Clause 9](#) are well documented, transparent and easily understood by all stakeholders and especially those within an organization. Additionally, the outcomes or results of measurements pertaining to organizational service excellence performance should be clearly articulated and recommendations for improvement be monitored and evaluated to

determine that operational service excellence performance continues to improve by ensuring staff and stakeholders at the appropriate level have the information required to achieve these improvements.

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