

Jalapeno How To - Use metrics (KPIs) with value streams



How are Metrics used in conjunction with Value Streams?

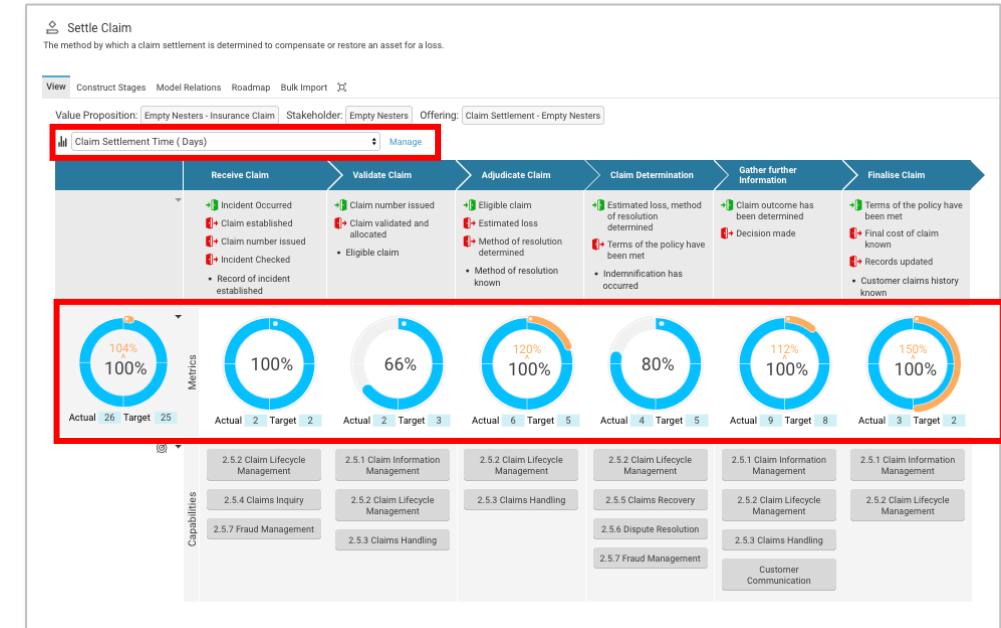
Jalapeno allows you to include metrics in the visualization of a value stream to indicate how well the enterprise is performing at each value stream stage.

The value stream visualization allows one or more metrics to be associated to a value stream. *Target* and *actual* values can be entered per metric, per value stream stage. You can select one of the associated metrics to be displayed on the value stream graphic. The *target* and *actual* values are presented in a gauge-type chart, aligned under the applicable value stream stages.

To better understand how to create value streams, view this [guide](#).

To better understand how to create metrics, view this [guide](#).

To better understand how to add capabilities contextual to a value stream stage, view this [guide](#).



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How do I associate a Metric with a Value Stream?

From the visualization of a selected value stream, you can associate an existing metric by using the **Manage** prompt displayed immediately above the value stream stage chevrons.

A pop-up Metrics dialog shows the currently associated metrics, and any entered values (*actual* and *target*).

You can associate metrics to the value stream by clicking the  button.

On clicking the 'Add' button, a list of filters is displayed to assist with the selection of a metric. The filters are the attributes and relations present for the meta-class METRIC in your model.

Select one or more filter values to display a filtered list of existing metrics.

Un-select the filter value(s) to display the full list of metrics.

Click on a metric label to select the metric.

The figure consists of three vertically stacked screenshots from the Jalapeno application, illustrating the steps to associate a metric with a value stream:

- Screenshot 1:** Shows the 'Acquire Coverage' value stream visualization. A cursor hovers over the 'Manage' button located above the 'Initiate Interest' stage chevron.
- Screenshot 2:** Shows the 'Metrics' dialog box. A cursor is clicking the 'add' button in the bottom right corner of the dialog. The dialog lists metrics such as 'Average cost per claim (Dollars)' with current values of 20 (Actual) and 40 (Target).
- Screenshot 3:** Shows the 'Metrics' dialog box with the 'Average cost per claim (Dollars)' metric selected. A red box highlights the metric details, including its description ('The total amount of claims paid out to policyholders by the insurance company as a % of total premium revenue') and its target value of 40. The dialog also shows other metrics like 'Percentage of Claims Completed Within 15 Days' and 'First Pass Resolve Rate'.

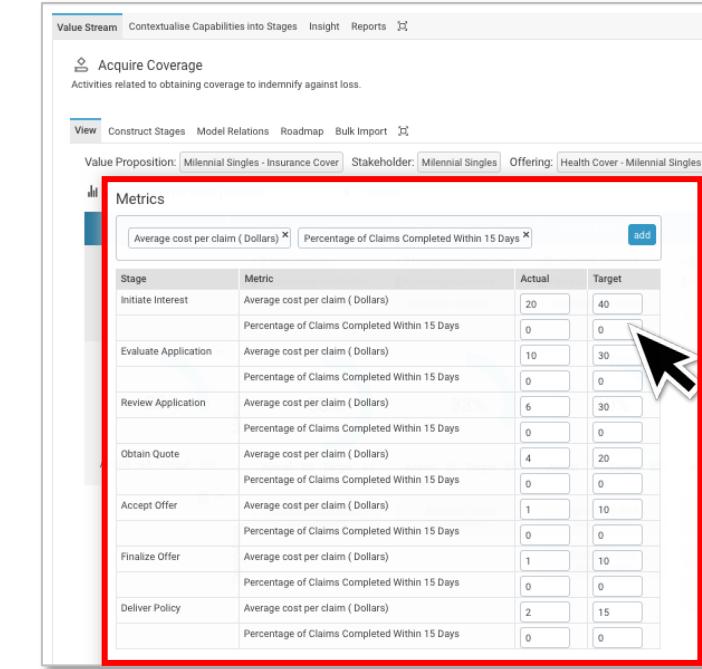
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How do I enter actual and target Metric values against Value Stream Stages?

Once a metric is selected for use with the value stream, you are then able to enter *target* and *actual* values against the metric for each of the value stream stages. To do this, click in the applicable cell in the grid shown in the Metrics dialog, and enter the value.

Once values have been entered, click on the  button to save the changes.



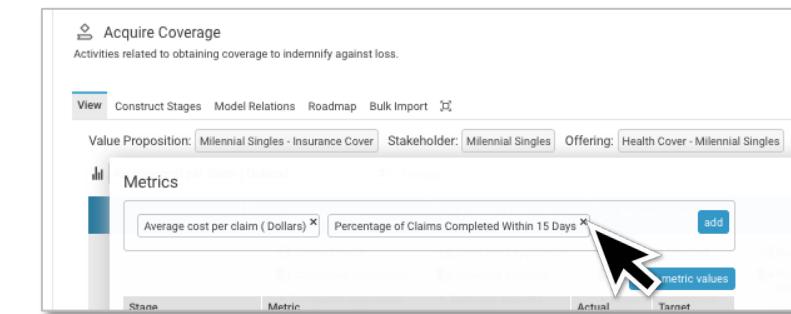
The screenshot shows the 'Metrics' section of the 'Value Stream' dialog. A red box highlights the data grid. A black arrow points to the bottom-right corner of the 'Target' column in the 'Evaluate Application' row.

Stage	Metric	Actual	Target
Initiate Interest	Average cost per claim (Dollars)	20	40
Evaluate Application	Average cost per claim (Dollars)	10	30
Review Application	Average cost per claim (Dollars)	6	30
Obtain Quote	Average cost per claim (Dollars)	4	20
Accept Offer	Average cost per claim (Dollars)	1	10
Finalize Offer	Average cost per claim (Dollars)	1	10
Deliver Policy	Average cost per claim (Dollars)	2	15

How do I remove (dis-associate) a metric from the value stream?

To remove a metric from usage with the value stream, in the Metrics dialog, click on the 'X' symbol shown on the metric item.

At the prompt, click 'OK' to confirm the action.



The screenshot shows the 'Metrics' section of the 'Value Stream' dialog. A black arrow points to the 'X' icon in the top right corner of the 'Percentage of Claims Completed Within 15 Days' row.

Stage	Metric	Actual	Target
Evaluate Application	Average cost per claim (Dollars)	10	30
Review Application	Average cost per claim (Dollars)	6	30
Obtain Quote	Average cost per claim (Dollars)	4	20
Accept Offer	Average cost per claim (Dollars)	1	10
Finalize Offer	Average cost per claim (Dollars)	1	10
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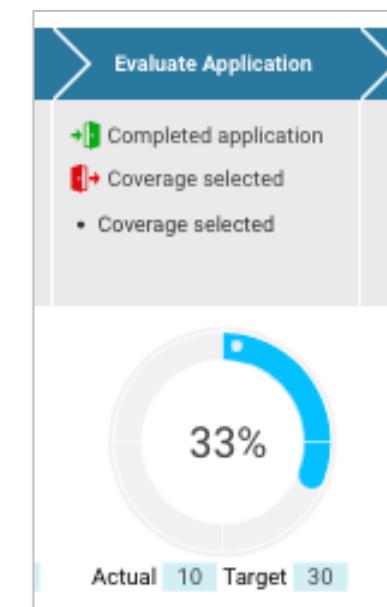
How do I change the displayed metric?

From the value stream visualization, you can change the displayed metric by using the metric selector located immediately above the value stream stages.

The screenshot shows the 'Settle Claim' value stream. Above the stages, a dropdown menu is open under the heading 'Value Proposition: Empty Nesters - Insurance Claim'. The menu lists several metrics, with 'Claim Settlement Time (Days)' checked. A black arrow points to the 'Manage' button at the bottom right of the dropdown.

How are Metric values presented on the Value Stream visualization?

Metric values are presented in gauge-type charts – each chart showing *target* and *actual* values for a value stream stage. The gauges show the *actual* value as a percentage of the *target* value.



Is it possible to hide, or minimize the gauges in the value stream visualization?

You can hide the gauges from view by collapsing the swim-lane in which they are located.

Collapse the swim-lane by clicking on the icon adjacent to the gauges.

The screenshot shows the 'Acquire Coverage' value stream. At the bottom of the stage list, there is a section labeled 'Metrics'. A red box highlights this section. The stage list includes 'Construct Stages', 'Model Relations', 'Roadmap', and 'Bulk Import'. Below the stage list, there are sections for 'Customer Interaction Management' and 'Account Management'.