Appendix B – Draft IM Metrics

1. Governance and Security

Targets for:	12 Months	24 Months	36 Months
A. Information / data / knowledge assets identified and assigned owners	• List of known digital assets e.g. IT Applications circulated by IT is validated / reduced / expanded and prioritised by depts	• All physical assets of each dept are identified, listed and prioritised by the dept	• All assets for each dept are revisited by the dept and lists / priorities updated
B. Assets comprehensively audited for information security risks	• 20% of known assets audited for information security risks and mitigation plans proposed	• Mitigation plans for first 20% agreed • Further 20% audited (40% cumulative) and mitigation plans proposed	• 100% (cumulative) audited and mitigation plans agreed • Key assets re-audited if needed
C. Staff employed for 12+ months are aware of information security good practice	• 50% of qualifying staff have completed annual information security awareness training	• 100% of qualifying staff have completed annual information security awareness training	• 100% of qualifying staff have repeated annual information security awareness training
D. Sharing protocols in place for those information / data / knowledge assets to be shared	• Sharing protocols agreed and put into practice for 25% of qualifying assets	• Sharing protocols agreed and put into practice for 50% of qualifying assets	• Sharing protocols agreed and put into practice for 100% of qualifying assets

2. Storage and Retention

Targets for:	12 Months	24 Months	36 Months
A. File system shares replaced by SharePoint / Team Sites	• All new files created in SharePoint / Team Sites	• All old files being accessed from file system moved to SharePoint / Team Sites	• All old files not used from file system deleted or archived
B. Staff understand and use protective marking of documents and files	• 25% of staff understand and use protective marking	• 50% of staff understand and use protective marking	• 100% of staff understand and use protective marking
C. Staff understand and apply retention scheme to records and information	• 25% of staff understand and apply retention scheme	• 50% of staff understand and apply retention scheme	• 100% of staff understand and apply retention scheme
D. Storage costs are reduced for digital and physical documents, files and records	• 10% reduction in digital storage • 5% reduction in physical storage costs	• 20% reduction in digital storage costs • 10% reduction in physical storage costs	• 30% reduction in digital storage costs • 20% reduction in physical storage costs

3. Data Use

Targets for:	12 Months	24 Months	36 Months
A. Use of property and customer data assets identified and reviewed	• 5 most critical business apps using these assets are identified, reviewed for quality, recency and commonality of definition for Customer and Property	• 10 most critical business apps using these assets are identified, reviewed	• 20 most critical business apps using these assets are identified, reviewed
B. Property and customer data mastered and automatically shared	• 5 most critical business apps share mastered data – data cleaned and held in a reporting database linked together	• 10 most critical business apps share mastered data	• 20 most critical business apps share mastered data
C. CRM system reuses data to prefill forms and support contact centre interactions	• 25% of forms pre-filled • 25% of calls/webchats supported by access to customer history	• 50% of forms pre-filled • 50% of calls/webchats supported by access to customer history	• 100% of forms pre-filled • 100% of calls/webchats supported by access to customer history
D. Key data models built from pooled and cross-referenced data assets	• 5 models created with meaningful insight e.g. Preventative analysis for Fraud	• 10 models created	• 20 models created

4. Information Analysis and Presentation

Targets for:	12 Months	24 Months	36 Months
A. Demonstration of evidence-based decision-making for policies and Member recommendations	• 25% of policies and Member recommendations use information to support decision-making	• 50% of policies and Member recommendations use information to support decision-making	• 100% of policies and Member recommendations use information to support decision-making
B. Dashboards and self-service reporting are in widespread and regular use by staff and customers	• 20 dashboard prototypes piloted • 20 self-service report prototypes piloted	• Every department has a departmental dashboard and some key self-service reports	• Every team has a team dashboard and some key self-service reports
C. Information analysis tools and the skills to use them are available to relevant staff	• Basic and advanced tools and training requirements identified for all relevant staff • Tools deployed for Power Bi Users	• Key staff trained in basic and advanced tools • Self-service training on basic tools available to all relevant staff	• All relevant staff have made some use of a tool • Use of at least one tool is a performance measure for relevant staff
D. Information presentation tools and the skills to use them are available to managers	• Basic and advanced tools and training requirements- e.g. Power BI developers identified for all relevant staff • Tools deployed	• Key managers trained in basic and advanced tools • Self-service training on basic tools available to all managers	• All managers have made some use of a tool • Use of at least one tool is a performance measure for managers

5. Knowledge Development

Targets for:	12 Months	24 Months	36 Months
A. Action-learning sets assigned to deal with cross-functional problems/challenges	• 5 sets assigned by SUMMIT or the fundamental review	• 10 sets assigned by SUMMIT or the fundamental review	• 20 sets assigned by SUMMIT or the fundamental review
B. Intranet used by staff as the knowledge base about internal services	• 10% increase in staff usage volume compared to baseline	• 20% increase in staff usage volume compared to baseline	• 50% increase in staff usage volume compared to baseline
C. Networks of experts across Corporation, partners and customers support development and maintenance of bodies of knowledge	• 5 key bodies of knowledge identified for which networks of experts are established	• 5 previously established networks are shown to be functioning well • Further 5 bodies of knowledge identified, and networks established (10 cumulatively)	• 20 (cumulatively) bodies of knowledge identified, with their networks established and functioning well
D. Expert systems deployed for functions / specialisms with wide relevance	• Prototype expert system built for one function / specialism	• Expert systems built for 5 (cumulatively) functions / specialisms	• Expert systems built for 10 (cumulatively) functions / specialisms