Metrics - Beta

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Overview

Metrics help organizations track key performance indicators (KPIs) and measure progress on improvement efforts, especially progress tied to **Business Outcomes**.

Metrics give you a structured way to define goals, collect measurements over time, and see at a glance which parts of the organization are on track.

Purpose: Measure progress on improvement by tracking KPIs across business units.

Metrics Screens

Organization view

- Navigation: In the organization sidebar, click Plan → Metrics

Business unit view

- Navigation: Open a business unit → ENVISION → Metrics

Key Concepts

Target and threshold

Each metric has a goal configuration:

Field	Description
Target	The value you are aiming to hit or maintain
Threshold	The boundary for acceptable performance
More or less than?	Whether a higher or lower value is better (**Greater than** or **Less than**)
Unit of Measurement	How the value is expressed (e.g. %, $, days)

Status

Each business unit's current measurement is classified into one of four statuses:

Status	Meaning
Met Target	Current measurement is at or exceeding the target
In Range	Current measurement is within the acceptable range (meets threshold but not target)
Out of Range	Current measurement is outside the acceptable range
No Data	No measurement has been recorded yet

Measurement frequency

Metrics are configured with a data entry frequency: **Weekly**, **Bi-Weekly**, **Monthly**, or **Quarterly**. If a business unit has not entered data within the expected interval, it is marked **Overdue**.

Scope

When creating a metric, you choose which level in the company it applies to:
- Organization
- System
- Team

After saving, you assign the metric to specific business units. Organization-level metrics may be auto-assigned; Team- and System-level metrics prompt you to select business units.

Manual vs. automated metrics

- **Manual metrics** – Data is entered by users in Navigator.
- **Automatic metrics (Jira / Azure DevOps (ADO))** – Data is synced automatically for a set of predefined metrics. Metric name, description, and values come from the integration; users can adjust **target/threshold** only. See this article, Automated Metrics Setup for Integrated Systems for information on configuring automated metrics.

If an integration with Jira or ADO is not configured, an alert message lets users know:**"No Jira or ADO integration"** with guidance to ask your company admin about integrations. You can still add metrics manually using **Add Metric**. Only **Company Admins** and **Assessment Admins** can add metrics.

Metrics - Organization View

A list of the existing metrics and data from across the organization summarized by level. Each metric provides business unit-level details when clicked. To see the data breakdown for a specific business unit, click into it from the list.

Page Components

1. Add Metric

Opens the metric creation flow (see **Adding a Metric** below).

2. Legend

Explains the four status colors used throughout Metrics:
- Met Target
- In Range
- Out of Range
- No Data

3. Summary cards

Each configured metric appears as a card showing:

- Metric name and level (e.g. "Lead Time (System Level)")
- Status breakdown across assigned business units (how many are met target, in range, out of range, or have no data)
- Linked **Business Outcomes**
- Alerts if business units need data (e.g. "3 business units need data")

Click a card to open the metric detail page.

4. Integration preview (when applicable)

If your company does not have a Jira or ADO integration configured, preview cards may show available automated metrics.

Business Unit Metric Detail Page

Sections

Current Measurement

Shows the most recent value, status badge, and trend information. Overdue metrics have an alert to indicate that.

Measurement trend chart

A chart of measurement values over time.

Data measurements table

Lists all recorded measurements:

Column	Description
Date	When the measurement was recorded
Value ({unit})	The measured value
Note	Optional note attached to the data point

Use **Add Data Point** to record a new measurement (manual metrics). Existing data points can be edited or deleted (manual metrics only). For automatically collected metrics, notes can be edited but values are synced from an external system and cannot be edited.

Adding a Metric

1. On the Metrics page, click **Add Metric**. Please note that you cannot add automated metrics, those need to be set up by a Company Admin through your integration with Jira or ADO.

2. In the **Add a Metric** modal, browse recommended metric templates. If Business Outcomes have been prioritized, they are shown at the top to help guide your choice.
    a. Filter templates by business outcome or search term.
    b. Click **Next** to configure a selected template, or **Create Your Own** to define a custom metric.
3. On the **Review Metric Template** or **Create Your Own Metric** screen, configure:
    a. Title and Description
    b. Frequency – How often should data be entered?
    c. Scope – the level (organization, system, or team)
    d. Goals – More or less than, Target, and Threshold settings
    e. Business Outcomes – Which outcomes this metric measures or is associated with
4. Click **Save Metric**.
5. If prompted, open the **Scope** modal to **Assign Business Units** – select which business units this metric should apply to. The business units will be filtered to the level specified under Scope. Click **Assign Business Units** when complete.

Manual metrics display this note during setup: *"This metric is manual, meaning you will manually enter its data into Navigator. Automated metrics are supported for our Jira and ADO integrations."*

Editing a Metric

From the metric detail page:

- **Manual metrics:** Click **Edit Metric** to update name, description, frequency, scope, goal, and business outcomes.
- **Automated metrics:** Click **Edit Target/Threshold** to adjust goal values only. Name, description, and synced data cannot be changed.
- **Assign Business Units:** Click to add or remove business unit assignments (manual metrics only - automated metrics are enabled at the business unit level by company administrators).