

# Analyst Performance Metrics to Drive Real Improvement in Performance

Track individual analysts by providing transparent, real-time reflection using performance metrics from their effectiveness in capturing payment commitments to their ability to recover invalid deductions.

[Click on the tabs to view the related list of metrics](#)

Summary

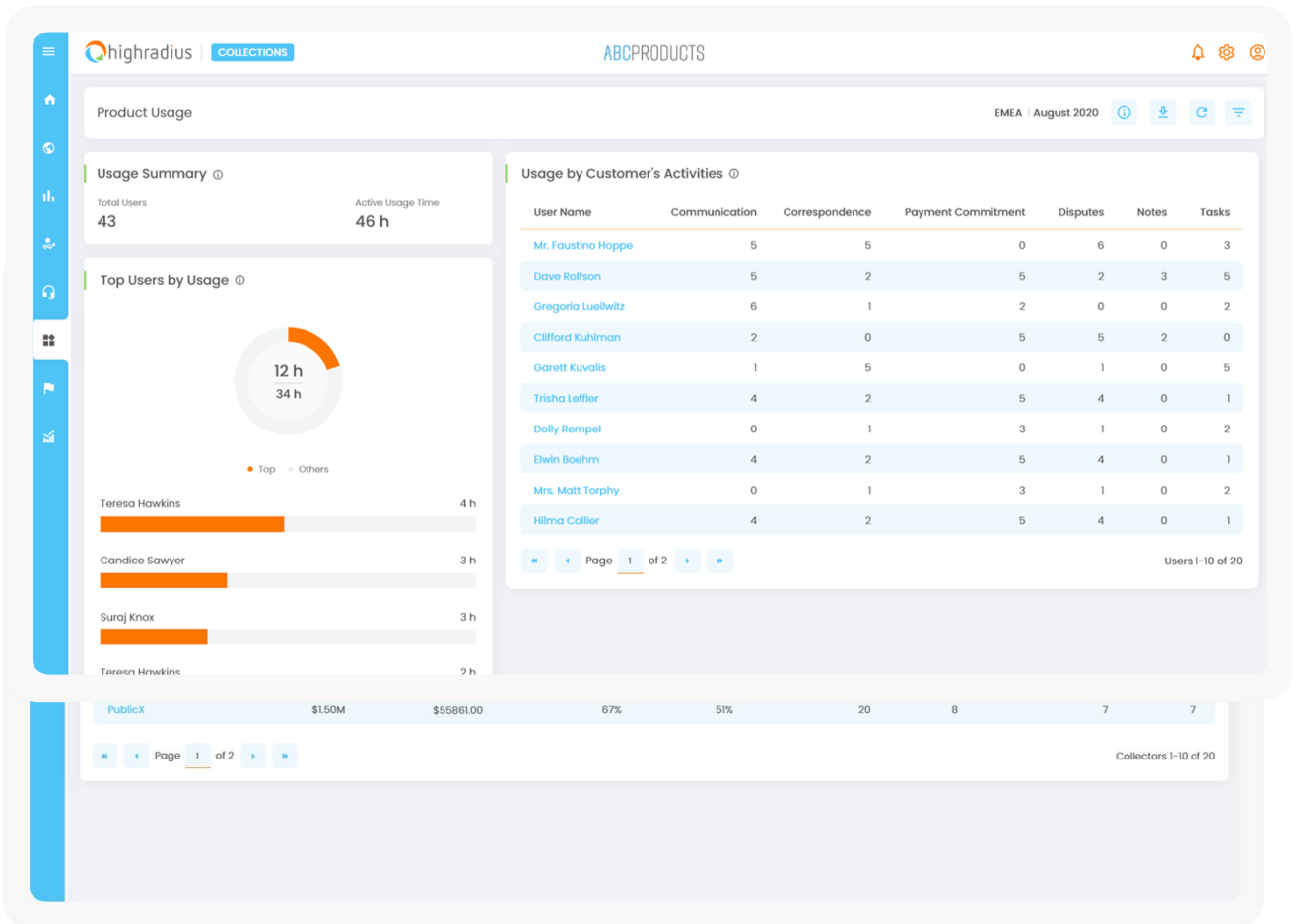
Cash App

Collections

Credit

Deductions

EIPP



Everyone looks great until you begin tracking results. Continuous, transparent performance measurement is a pillar of building a high-performance team. With dotONE Performance, you get a wide range of metrics to assess your analysts so you can foster a culture of high-performance process improvement.

## Leaderboard for Collections Team Performance

1. Set your cash collection goals per collector
2. Amount of Cash Collected per User
3. Percentage of Goal Achieved per Collector (Planned vs Actual)
4. Percentage Past Due per Collector
5. Insights and Recommendations of what your best collectors are doing

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Automation	ERP Posted Header Hit Rate
Automation	ERP Posted Item Hit Rate
Automation	Header Level Hit Rate
Automation	Item Level Hit Rate
Automation	Pre EH vs Post EH Hit Rate - Header Level
Automation	Pre EH vs Post EH Hit Rate - Item Level
Automation	Simulated vs Posted Hit Rate
Automation	System Automation Rate - Header Level
ERP Posting Analysis	Payment Volume by ERP Posted Status
ERP Posting Analysis	Missing MICR and Payer Name Mappings
Productivity	User Productivity Based on Time Spent
Top Customers	Line Item Volume
Top Customers	Line Items Per Reason Code.
Top Customers	Payment Value
Top Customers	Payment Volume
Volume	Line Item Volume by Item Type
Volume	Line Item Volume by Reason Code
Volume	Payment Value by Status
Volume	Payment Value by Status-Pre EH
Volume	Payment Volume by Customer Identification Method
Volume	Payment Volume by ERP Posted Status
Volume	Payment Volume by Linked Remit Source
Volume	Payment Volume by Status - Post EH

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(1/2)

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View Next  
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Dashboards	AR Metrics
Dashboards	Activity Analysis of all Collectors
Dashboards	Customer Aging Analysis by Local Currency-as of Date reporting
Dashboards	P2P (Promise to Pay) Receivable forecasting
Dashboards	Planned v/s Actual calls
A/R Metrics	Average Days Late
A/R Metrics	Average Days to Pay
A/R Metrics	Collection Effectiveness Index
A/R Metrics	Days Sales Outstanding based on Annual Sales
A/R Metrics	Days Sales Outstanding based on Monthly Sales
A/R Trends	Monthly A/R Balance
A/R Trends	Past Due Amount
A/R Trends	Total Amount vs Current Amount
Track Collections Activity	Activity Trend
Track Collections Activity	Activity Trend - By Collector
Track Collections Activity	Amount Collected by Collector
Track Collections Activity	Amount Collected by Collector
Track Collections Activity	Auto Correspondence Trend and Time Savings
Track Collections Activity	Payment Committed vs Payment Collected
Customer Analysis	Top Customers by Average Days Due
Customer Analysis	Top Customers by Average Days Late
Customer Analysis	Top Customers by Average Days to Pay
Customer Analysis	Top Customers by Past Due A/R
Customer Analysis	Top Customers by Total Open A/R
Customer Analysis	Top Delinquent Customers

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Reports to Drill Down	Activity Grid
Reports to Drill Down	Analyst Performance (Activity analysis - Grid)
Reports to Drill Down	Analyst Performance Grid
Reports to Drill Down	Customer Performance Activity Analysis Grid
Reports to Drill Down	Customer Performance Home Grid
Reports to Drill Down	Past Due Percent Grid
Reports to Drill Down	Product Usage-Activity Analysis
Forecasting	Receivables Forecasting (AI)
Forecasting	Receivables Forecasting (AI)
Forecasting	Receivables Forecasting (AI)-Grid
Forecasting	Receivables Forecasting (WADL)
Forecasting	Accuracy of Payment Date Predictions - tracking
Forecasting	Percentage Accuracy of Payment Date Predictions - tracking
Local Currency Analysis	Open Amount By Customer Segment
Local Currency Analysis	Open Amount by Aging Buckets
Local Currency Analysis	Past Due Amount By Customer Segment
Local Currency Analysis	Top Customers by Past Due A/R
Local Currency Analysis	Top Customers by Total Open A/R
Local Currency Analysis	Top Delinquent Customers
Open A/R Analysis	Open Amount By Aging Buckets
Open A/R Analysis	Open Amount By Company Code
Open A/R Analysis	Open Amount By Customer Segment
Open A/R Analysis	Past Due Amount By Company Code
Open A/R Analysis	Past Due Amount By Customer Segment

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Credit Application

Reports Retrieved by Agency

Credit Application

Application submission trend

Credit Application

Submitted vs Abandoned Applications

Credit Workflows

Customer Reviews by Review Type

Credit Workflows

Upcoming Customer Reviews By Months

Credit Workflows

Workflows by Status

Customer Analysis

Customer classification based on risk classes

Customer Analysis

Customers by Blocked Orders

Customer Analysis

Customers by Credit limit

Customer Analysis

Customers by Percent Utilization

Documents Analysis

Certificates Due To Expire In Days Bucket

Documents Analysis

Expired Vs Unexpired Documents

Efficiency Analysis

Applications processed by Credit Analyst

Efficiency Analysis

Number of Reviews Processed by Credit analyst

Portfolio Analysis

Concentration Risk Analysis

Portfolio Analysis

Credit limit by Risk Class

Portfolio Analysis

Credit limit by strategy

Portfolio Analysis

Major Swing in Credit Limit

Portfolio Analysis

Number of Customers by the approved Credit Limit

Portfolio Analysis

User Approved Vs Auto Approved Credit Limits

Trend Analysis

Customer Historical Trend Analysis

Trend Analysis

Customer Historical Trend Analysis

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Customer Analysis	Average Days to Resolve
Customer Analysis	Deduction Value - Last 12 Months
Customer Analysis	Deduction Volume - Last 12 Months
Customer Analysis	Open Deduction Value
Customer Analysis	Open Deduction Volume
Deductions Trend	Average Days to Resolve / Monthly
Deductions Trend	No of Customers vs No of Deductions
Deductions Trend	Total deductions vs predicted deductions
Deductions Trend	Total deductions vs predicted deductions
Deductions Trend	Value Trend
Deductions Trend	Volume Trend
Operations Analysis	Average Days to Resolve by Owner
Operations Analysis	Open Deduction Aging
Operations Analysis	Open Deduction by Company code
Operations Analysis	Open Deductions by Owner
Operations Analysis	Open Deductions by Processor
Operations Analysis	Processors based on Deduction Value
Operations Analysis	Processors based on Deduction Volume
Deductions Root Cause Analysis	Average Days to Resolve by Reason Code
Deductions Root Cause Analysis	Deductions Received by Reason Code
Deductions Root Cause Analysis	Open Deductions by Reason Code

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Dashboards	Adoption Analysis
Dashboards	Payment Analysis
Dashboards	Presentment Analysis
Adoption Analysis	Customer Users Logging Trend
Adoption Analysis	Invoices Delivered
Dispute Analysis	Customer Dispute Creation Volume Trend
Dispute Analysis	Customer Dispute by Reason Codes Volume Trend
Payments Analysis	Customers with highest Payment Transaction Amount in the selected Time Period
Payments Analysis	Number of Failed Credit Card Transactions by Time Period
Payments Analysis	Payment Value Trend by Payment Method
Payments Analysis	Payment Volume Trend by Payment Method
Payments Analysis	Payments by Supplier Users vs Buyer Users (Monthly)
Presentment analysis	Customer Invoice Retrieval Volume Trend
Presentment analysis	Customer Statement Retrieval Volume Trend



Achieve best-in-class Order to Cash KPIs  
and build a high-performance culture

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