DASHBOARD DOCUMENTATION

Call Centre Dashboard

Prepared by Temidayo Sunday Alade, Data Analyst

Power BI Desktop · DAX

33K	25.02	75.26%	4
calls in October 2020	minutes per call, on average	answered within the service level	contact channels

> A practice dashboard built on a training dataset. It is not client data. Figures are quoted as they appear on the report.

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01 THE STORY BEHIND THE REPORT

> *Imagine you run a customer service centre. On a quiet Monday nobody complains. On the day of a billing error the phones do not stop, and customers wait.*
>
> *A call centre manager needs to see, in one place, how many calls came in, how long they took, how customers felt and whether the promised response time was met.*

A call centre wants to know the volume and length of its calls, why people call, by which channel and from where, how they feel afterwards, and how often the company met its response-time promise.

02 WORDS USED IN THIS DOCUMENT

Word	What it means
KPI	Key performance indicator: one number that says how the business is doing, such as total sales or churn rate.
SLA	Service level agreement: the time limit a company promises to answer within.
Slicer	A filter the reader can click, such as a year, a region or a product.
Channel	How the customer made contact: call centre, chatbot, email or web.
Sentiment	How the customer felt about the contact, from Very Negative to Very Positive.
Within, below or above SLA	Whether the response was inside the promised time, or not.

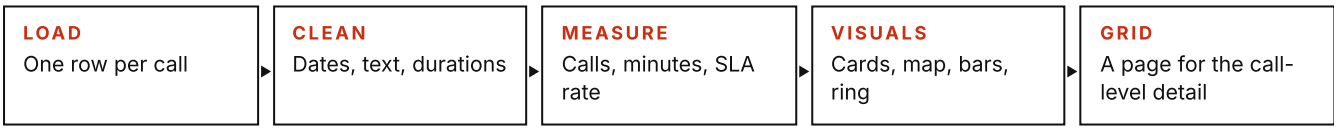
03 WHAT THIS REPORT IS

Item	Detail
Author	Temidayo Sunday Alade
Tool	Power BI Desktop
Period	1 to 31 October 2020
Pages	A summary page and a detail grid
Filters	Date range, state and city
Coverage	United States states; call centres in Los Angeles, Baltimore, Chicago and Denver

04 THE QUESTIONS THE REPORT ANSWERS

Question	Where it is answered
How many calls, for how long?	Cards: calls, hours, minutes, average duration
Are we meeting the response promise?	Response time card and the grid column
Which days are busy?	Total calls per day of the week
Where do calls come from?	Map and calls by state
Why do customers call?	Calls by reason
How do customers reach us?	Calls by channel
How do they feel?	Calls by sentiment
Which call centre is busiest?	Calls by call-centre city

05 HOW IT WAS BUILT



1. Load the call records: a call ID, customer, channel, state and city, reason, response time status, call duration in minutes and date.
2. Prepare the date and the day of the week, and make sure the response time status holds just three values: Within SLA, Below SLA and Above SLA.
3. Write the measures: count of calls, total call minutes, total hours, average minutes per call and the share of calls answered within the service level.
4. Build the summary page with cards on top, then day, map, reason, channel, sentiment and city below, and a date, state and city filter down the side.
5. Add a grid page that lists every call with its channel, state, reason, response status and minutes, with a total at the foot.

06 HOW THE NUMBERS ARE WORKED OUT

THE FIVE CARDS

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total hours       =  total minutes ÷ 60
average duration  =  total minutes ÷ number of calls
response time %   =  calls within SLA ÷ all calls
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Card	Working	Result
Total minutes	Sum of all call minutes	824,222
Total hours	824,222 ÷ 60	13,737 (13.74K)
Average duration	824,222 ÷ about 32,900 calls	25.02 minutes
Calls by reason	23K + 5K + 5K	33K
Calls by sentiment	11.1K + 8.8K + 6.0K + 3.9K + 3.2K	33.0K

> **An everyday example.** A call that runs 25 minutes is about average. If every one of the 33K calls ran the average 25 minutes, the centre would spend about 13,700 hours on the phone in the month, which is about 18 agents working non-stop through every hour of the 31 days.

07 WHAT IT FOUND

Billing dominates. About 23K of the 33K calls, around 70 per cent, are billing questions, and payments and service outages account for only 5K each. One reason is driving most of the workload, so a fix to the billing process or its communication would remove most of the volume.

Sentiment leans negative. Negative (11.1K) and Very Negative (6.0K) together make 17.1K calls, more than half of the total, while Positive and Very Positive together make only 7.1K. A large billing workload and unhappy customers go together.

Friday and Thursday are the busiest days at 5.6K and 5.5K, against about 4.3K to 4.4K for the other days.

Los Angeles takes 14K calls and Baltimore 11K, while Chicago takes 5K and Denver 3K, so the load is heavily uneven across the four centres.

The response time card reads 75.26 per cent, which the report presents as the share of calls handled within the service level. About one call in four misses it.

08 WHAT I WOULD RECOMMEND

- Find and fix the cause of billing questions, for example a clearer bill, an automatic message when a bill changes and a self-service answer on the chatbot and web.
- Move some of Los Angeles and Baltimore's load to Chicago and Denver, or staff the two busy centres to match.
- Add cover on Thursdays and Fridays.
- Track the share of calls above the service level by reason and centre, to find where the missed promises come from.

09 NOTES ON THE FIGURES AND LIMITATIONS

Every figure in this document is taken from the report page it describes. These notes say how to read the figures that need care, and what the data cannot show.

- **Service level.** Each call is marked Within, Below or Above SLA. I read the response time card, 75.26 per cent, as the share marked Within.
- **One month.** October 2020 is a single month, so the weekly pattern may not hold across the year.

10 OUTPUTS

A 2-page Power BI report (PDF export): the summary dashboard and the call-level grid.

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