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## SumUp

Strategy Paper - Operations Analytics Lead

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### Strategy for Support Teams

#### **Analytics: Key Metrics & Targets**

##### **Key Questions:**

1. **North Star:** What is the North Star metric that drives Support strategy?
2. **Targets:** What are the targets for the main metrics? How distant are they from the current baseline?
3. **Key leveraging factors:** what are the key contributors to the North Star?
4. **Swift in trend:** How quickly can you spot change in trend, peaks or drops?
5. **Churn evaluation:** can you detect patterns between Support touchpoints and loss of a customer?

##### **Recommendations:**

1. **Dashboard with main KPIs:** Create visibility on the status of the main metrics with a clear storyline between charts. Easy comparison between channels, country, agent companies and any other relevant breakdown.
2. **High Value Actions / Churn analysis:** run an analysis to understand which factors have a big impact on the North Star and which detect a risk to lose a Customer.
3. **Alarm Setting:** Send an automatic message when metrics go outside of the expected range. Allow this calculation to be time sensitive in order to plan for additional capacity.
4. **Data Education:** The entire Operation team knows clearly what they are optimising for, what are the goals and which metric can reflect the impact of their actions.

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## Resources allocation & prioritisation

### Key Questions:

1. **Agents' allocation:** How do we make sure that the Agents are always working on the most pressing issues and guarantee the best experience to the customer?
  - a. How are the resources allocated based on channel, country and reason group?
2. **Agile framework:** How flexible is this allocation?
3. **Increase in workload:** How do you react to unexpected increases in touchpoints?

### Recommendations:

1. **Prioritisation:** between all the factors that contribute to the positive outcome on the North Star. Monitor if there can be changes that could improve performances.
2. **Predictive models:** based on seasonality, feature releases and other key factors, plan for the best capacity needed.
3. **Onboarding & Flexibility:** onboard Agents to be able to reply to most pressing issues, allow flexibility between channels or regions to reply to unexpected urgencies flagged by the Alarm. Monitor if time of resolution decreases together with the share of unresolved tickets.

## Optimisation

### Key Questions:

1. **Channel selection:** How do you make sure that the Customer is choosing the best channel to address their inquiry?
2. **Information available:** How do you make sure that the Customer provides all the relevant info to be able to resolve the inquiry in the least time possible?

### Recommendations:

1. **Analysis and iterations:** Run periodic analysis on the inquiry's reason and channel selected. Monitor how many users decide not to open an inquiry after visiting the Support centre pages. Identify if there are areas of improvements and plan to A/B test changes.
2. **Chatbot:** test automatic replies supported by AI. Monitor how many customers won't open an inquiry via other channels.

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3. **Templates:** test if templates positive correlate with a lower time of resolution.

## Cost Overview

### Key Questions:

1. **Cost efficiency:** How do you evaluate cost efficiency per channel and agent company?
2. **Further Investment:** Which metrics do you use to evaluate further investments into Support?

### Recommendations:

1. **Cost Monitor:** evaluate with a fixed cadence the cost allocation for channel, region and company, compare against the target, spot improvements due to the tested initiatives.
2. **Performance Monitor:** have metrics and rules in place that would determine an increase in the Support capacity.

## BPO evaluation

### Key Questions:

1. **Outsourcing Strategy:** What is the Strategy behind outsourcing? Based on which factors is it decided?

### Recommendations:

1. **KPI monitor:** Introduce KPIs for BPO partners and conduct regular performance reviews also based on Customer Satisfaction. Understand if the BPO Agents available can respond to the demand via share of addressed tickets and resolution time.

## 2024 Channel Strategy (based on Cost)

### Recommendations:

1. Prioritise Email for non-urgent matters
2. Reduce the dependency on Calls
3. Explore alternative Support mean

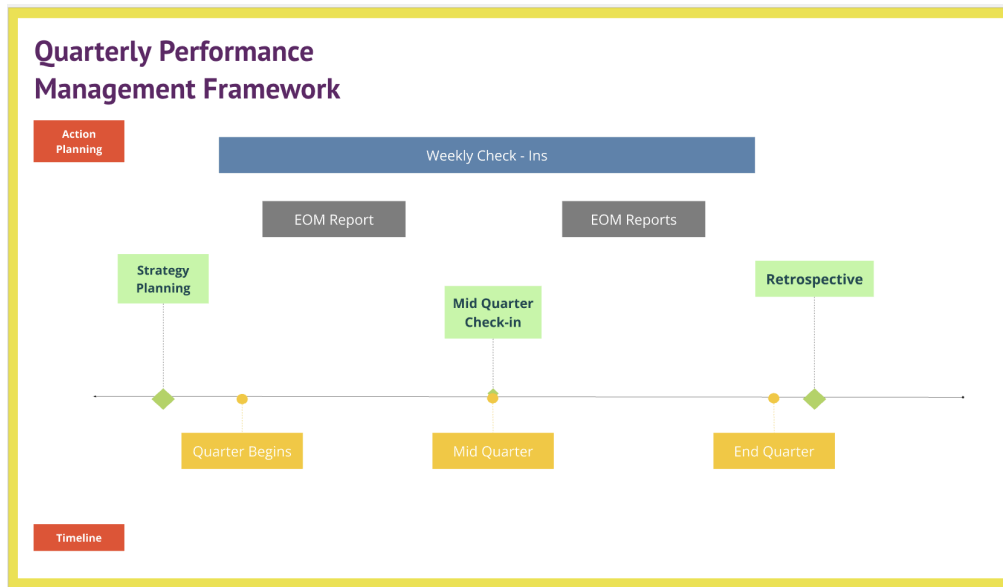
### Rationale:

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- **Cost efficiency:**
    - Email is the cheapest channel and allows multiple touchpoints to be handled at the same time.
    - Call has the biggest cost investment.
    - Chat has similar cost investment as Call but multiple chats can be handled at the same time.
  - **Time sensitive issues:** ensure that the waiting time for Call is below the accepted target for urgent matters (currently 30sec in average).
  - **Resolution time trade-off:** Despite the overall longer resolution time compared to Chat and Call, Email has resolution time within 4 days of 90%.
  - **Possibility of Redirection:** If the issue has not been tackled or resolved within a target time, it can be redirected to other channels together with a summary of the problem.
  - **Further Capacity Plan:** Plan for further capacity for Agents to tackle emails is still cheaper than tackle touchpoints via Call or Chat.

#### Possible next actions:

- **Different Inquiry flow:** A/B test and release a new flow that would prioritise Email in the first place and Chat secondly as preferred channels for low-urgency reason groups' touchpoints.
- **Template:** Email would allow a primary touchpoint with a template to have the relevant information readily available. Test if this reduces the resolution time.
- **Optimise Self-Service Support:** analyse how many users find the relevant info by reading through the Documentation already available. Test improvements to the Web pages to optimize for Contacts decrease after browsing an info page. Recognize inquires patterns and plan for additional Documentation on the Web side.
- **New Support tests:** Test if AI-driven support channels ensure the same level of customer satisfaction and reduce overall Support costs. Use chatbots to handle standard, low-complexity inquiries and free up agents for urgent matters.

## Quarterly Performance Management Framework



The Management Framework includes:

1. **Planning** at the beginning of the Quarter
2. **Monitor** and Performance check-ins on a regular basis
3. **Performance reviews** and adjustments (if needed)
4. **Retro** at the end of the quarter.

### 1. Quarter Kickoff Meeting

- a. **Goal:** Define the Strategy and agree on specific goals and targets to be achieved at the end of the Quarter.
  - i. **VP of Operations & Director of Support** shares the Strategy
  - ii. **Team Leads** are onboarded and raise any concerns
  - iii. **Head of Data Operations** helps define the targets and main KPIs.
- b. **Who:** VP of Operations, Data Analyst Lead, Team Leads.
- c. **Outcome:** each team and region are provided with the KPIs, the roadmap of initiatives and the resource allocation
  - i. **Team Leads** inform the teams and get everyone per function onboarded
  - ii. **Operational Team Leads** plan roadmaps and execute based on strategy.
  - iii. **Data** makes sure that the performance monitor is in place for the Quarter.

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## 2. End of the week: Weekly sync

- a. **Goal:** raise any blockers / issues to accomplish strategy and quick check-in on performances
- b. **Who:** Team Leads.
- c. **Outcome:** Resolve short term blockers. Leadership is updated on the latest performances.
- d. **Implementation:** Initiatives contributors share the progress and / or critical warnings.
  - i. **Data** Implement a template with KPIs vs Targets
  - ii. **Operational Leads** confirm if performances and initiatives implementation are on track or they need support

## 3. End of the month: Monthly Review

- a. **Goal:** everyone is up to date with the latest monthly performances. Celebrate achievements and raise underperforming domains.
- b. **Who:** Team Leads, BPO Representatives. + VP of Operations & Director of Support for Month 2 check-in.
- c. **Outcome:** adjustments are planned based on where there is more critical need
- d. **Implementation:**
  - i. **Operational leads** shares updates on the roadmap
  - ii. **Data** provides all the relevant numbers and recommendations on how to achieve goals
- e. **Bonus: Strategy Review** (at the end of Month 2)
  - i. **VP of Operations & Director of Support** confirms Strategy and targets based on the performances of the prev. 2 months

## 4. End of the quarter: Review & Retrospective (Team Meeting)

- a. **Goal:** understand the achievements of the quarter and if we managed to deliver what planned
- b. **Who:** VP of Operations, Director of Support, Team Leads
- c. **Outcome:** everyone is aware of the performances of the prev quarter. Useful insights are provided to plan for the next quarter's strategy.
- d. **Implementation:**

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- i. **VP of Operations & Director of Support** present the end of quarter outcomes
  - ii. **Data** provides the data around the overall performances and the ones on the main initiatives implemented during the quarter. Gives recommendations for the next quarter.
  - iii. **Operational Leads:** raise what worked well, what to change, what to drop.
  - iv. **Team Leads:** raise what to Start / Stop / Continue doing next quarter.