

Performance Scorecard – Business Insights

1. KPI Cards (Top row)

- **CSAT:** 0.55 (Goal 0.85 → Status: Not Met)
 - **Quality:** 0.79 (Goal 0.90 → Status: Not Met)
 - **AHT:** 225.04 (Goal 150 → Status: Not Met)
- ➡ These highlight at a glance whether performance is on or below target.
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2. Goal vs Status (Left Panel)

- Table shows each KPI alongside its **target value** and **status (Met/Not Met)**.
- ➡ Provides quick comparison of performance vs business expectations.
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3. CSAT, Quality, AHT Achieved vs Remaining (Bar Charts)

- Each chart splits progress into **achieved vs remaining** towards the goal.
- ➡ Makes it clear how much improvement is still required.
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4. Team Scorecard (Middle Panel)

- Table with teammate names, CSAT Status, AHT Status, Quality Status, and **Overall Score (M)**.
 - Sorted to highlight **Bottom 5 Performers with Reason**.
- ➡ Identifies individual gaps for targeted training or intervention.
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5. Quartile Analysis

- **Pie Chart (Q1–Q4 Overall Scores):** Shows how teammates are spread across performance quartiles.
- **Quartile Distribution (Table Chart):** Count of teammates in Q1 (lowest 25%) → Q4 (top 25%).

➡ Segments performance distribution across the team, useful for fairness and benchmarking.

6. Goals & Weights (Right Panel)

- CSAT Goal: 85% (40% weight)
- AHT Goal: 150 (40% weight)
- Quality Goal: 90% (20% weight)

Conclusion

The performance scorecard highlights key business insights:

- **Customer Satisfaction (CSAT)** is below the goal of 85% → indicating customer experience gaps.
- **Average Handling Time (AHT)** exceeds the target of 150 → signaling inefficiencies in process or training.
- **Quality** meets the 90% goal → showing that work accuracy and compliance are strong.
- **Quartile distribution** reveals that most teammates are concentrated in Q2 and Q3 → suggesting mid-level performance with room for upward movement.
- **Bottom 5 performers** consistently fail across all KPIs → pulling overall averages down.

Overall, the team is **performing moderately**, but KPI gaps (especially CSAT & AHT) are preventing goal achievement.

Suggestions for Improvement

1. Customer Satisfaction (CSAT):

- Implement **customer feedback loops** (e.g., post-interaction surveys, follow-up calls).

- Provide **soft-skill and empathy training** for teammates with consistently low CSAT.
- Introduce **real-time CSAT monitoring dashboards** for faster corrective action.

2. Average Handling Time (AHT):

- Review workflows and **eliminate redundant steps** in the process.
- Conduct **targeted coaching** for high-AHT performers.
- Use automation/AI tools (chatbots, macros) to reduce handling time without impacting quality.

3. Quality:

- Maintain current practices, but **introduce peer reviews or mentoring** to ensure consistency.
- Leverage top performers in Q4 as **role models** for knowledge sharing.

4. Performance Management:

- Set **personalized improvement plans** for bottom 5 performers.
- Use **quartile analysis** regularly (monthly/quarterly) to track shifts in teammate performance.
- Align incentives/bonuses with **KPI achievements** to motivate better results.

Final Business Analyst Insight : -

The scorecard is effective in surfacing performance gaps. With focused interventions on CSAT and AHT, the business can move more teammates into higher quartiles, raise overall performance, and achieve sustainable customer satisfaction and efficiency improvements.