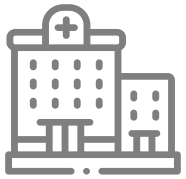


Employee performance report

Medical equipment company

Created the agent performance reporting in Tableau to measure productivity and efficiency KPIs of the employee's vis a vis the goals set by supervisors/managers

© 2024 Accordion CONFIDENTIAL

Medical equipment company needs to monitor the employee performance

EMPLOYEE PERFORMANCE REPORT

Picture this…

You're looking to establish a robust reporting using Tableau to promote productivity optimization, agent efficiency, and performance improvement. Currently, you are unable to monitor the productivity and performance of the call center agents after the implementation of remote working model since different data points like punch-in time, hours worked, calls handled, etc. are present in different ERP systems and there is no one platform to integrate the data.

You turn to Accordion.

We partner with your team to create the agent performance reporting in Tableau to measure productivity and efficiency KPIs of the employee's vis a vis the goals set by supervisors/managers, including:

1) Analyzing the employee performance data for various KPI metrics like handling calls, average talk time, average handle time, time spent on after call work, % of inbound calls that can convert into sales, no. of orders booked, etc.
2) Developing Tableau based dashboards to track the 'agent wise view' that provide metrics at relative performance level, 'Trend' view that showcases the trends of agent performance metrics over DoD, WoW or MoM.
3) Developing Tableau based 'Scorecard' dashboard that tracks agent's performance vis a vis the goals set for each metric.

Your value is enhanced.

The analysis helped you to set better goals with the employees, identify what areas need to be improved, and support employees to meet their performance goals. Tableau dashboards enabled to track agent level as well as team level KPIs giving a comparable view of the performance – this helped to identify the strengths and weaknesses in performance trends over the time, top performing and poor performing employees, team-wise performance, Top N agent-wise performance, etc. The performance report has also helped business areas to track performance at supervisor-level and agent-level for the productivity and performance outcomes.

KEY RESULT

- 4-5 person hours reduced in making the performance reports

VALUE LEVERS PULLED

- Sales Conversion Analysis
- KPI benchmarking
- Performance Metrics

© 2024 Accordion CONFIDENTIAL

Agent performance report for medical equipment company

Employee Performance Report

Situation

- Client team was unable to monitor the productivity and performance of its call center agents after the implementation of remote working model since different data points like punch-in time, hours worked, calls handled, etc. were present in different ERP systems and there was no one platform to integrate the data. They were looking for an automated Tableau report to monitor KPIs and trends for agent performance, average call handle time, agent time in queue, booked orders, and patient touches.
- Partnered with the client to establish performance reporting using Tableau to promote productivity optimization, agent efficiency, and performance improvement.

Accordion Value Add

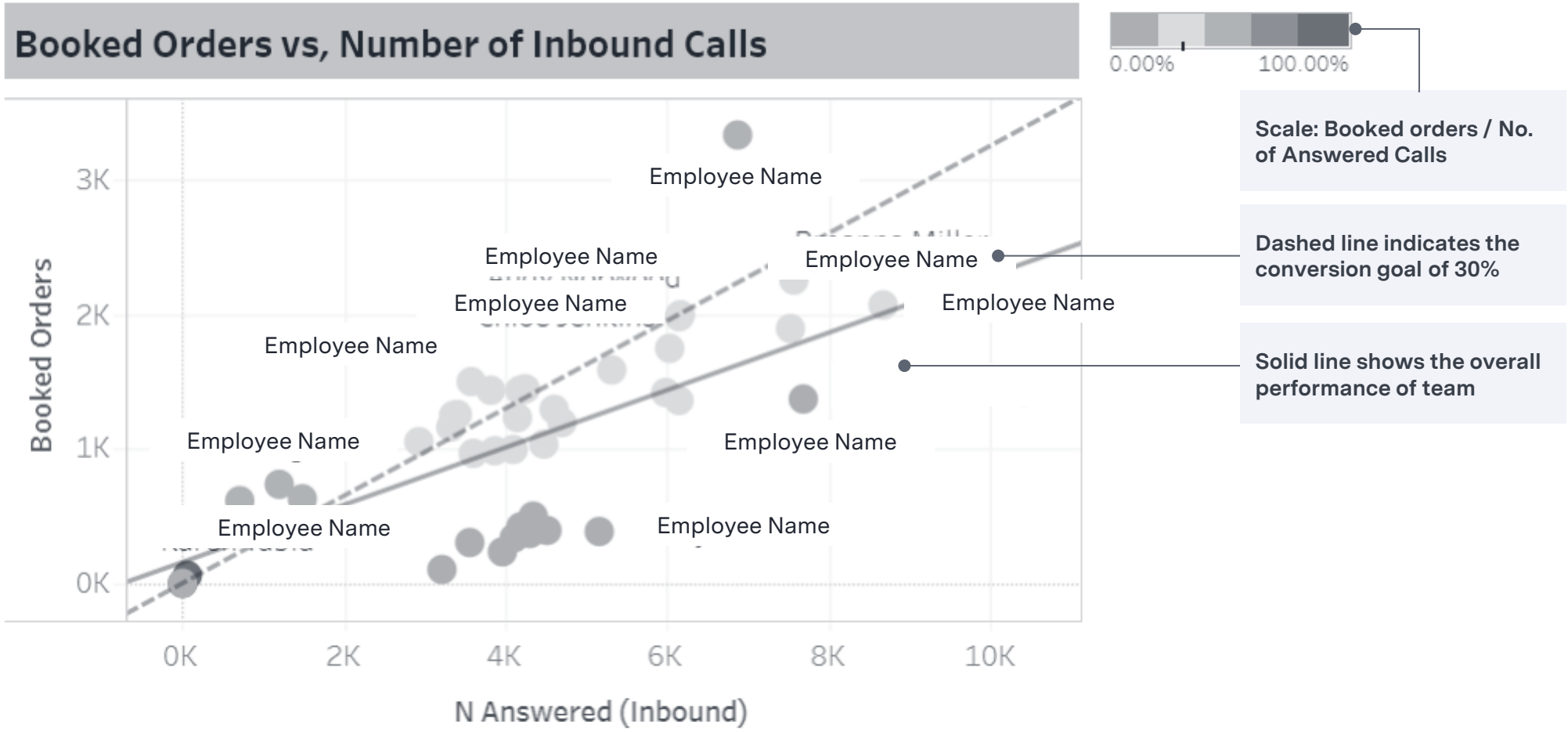
- Analyzed the employee performance data for various KPI metrics like handled calls, average talk time, average handle time, time spent on after call work, % of inbound calls that converted into sales, no. of orders booked, etc.
- Developed Tableau based dashboards to track the 'agent wise view' that tracks the metrics at relative performance level, 'Trend' view that tracks the trends of agent performance metrics over DoD, WoW or MoM.
- Developed Tableau based 'Scorecard' dashboard that tracks agent's performance vis a vis the goals set for each metric.

Impact

- The analyses helped the client to set better goals with the employees, identify what areas need to be improved, and support employees to meet their performance goals.
- Tableau dashboards enabled the client to track agent level as well as team level KPIs giving a comparable view of the performance – this helped client identify the strengths and weaknesses in performance trends over the time, top performing and poor performing employees, team-wise performance, Top N agent-wise performance, etc.
- Performance report helped client in all business areas to track performance at supervisor-level and agent-level for the productivity and performance outcomes

© 2024 Accordion CONFIDENTIAL

Agent-wise performance (1/2)



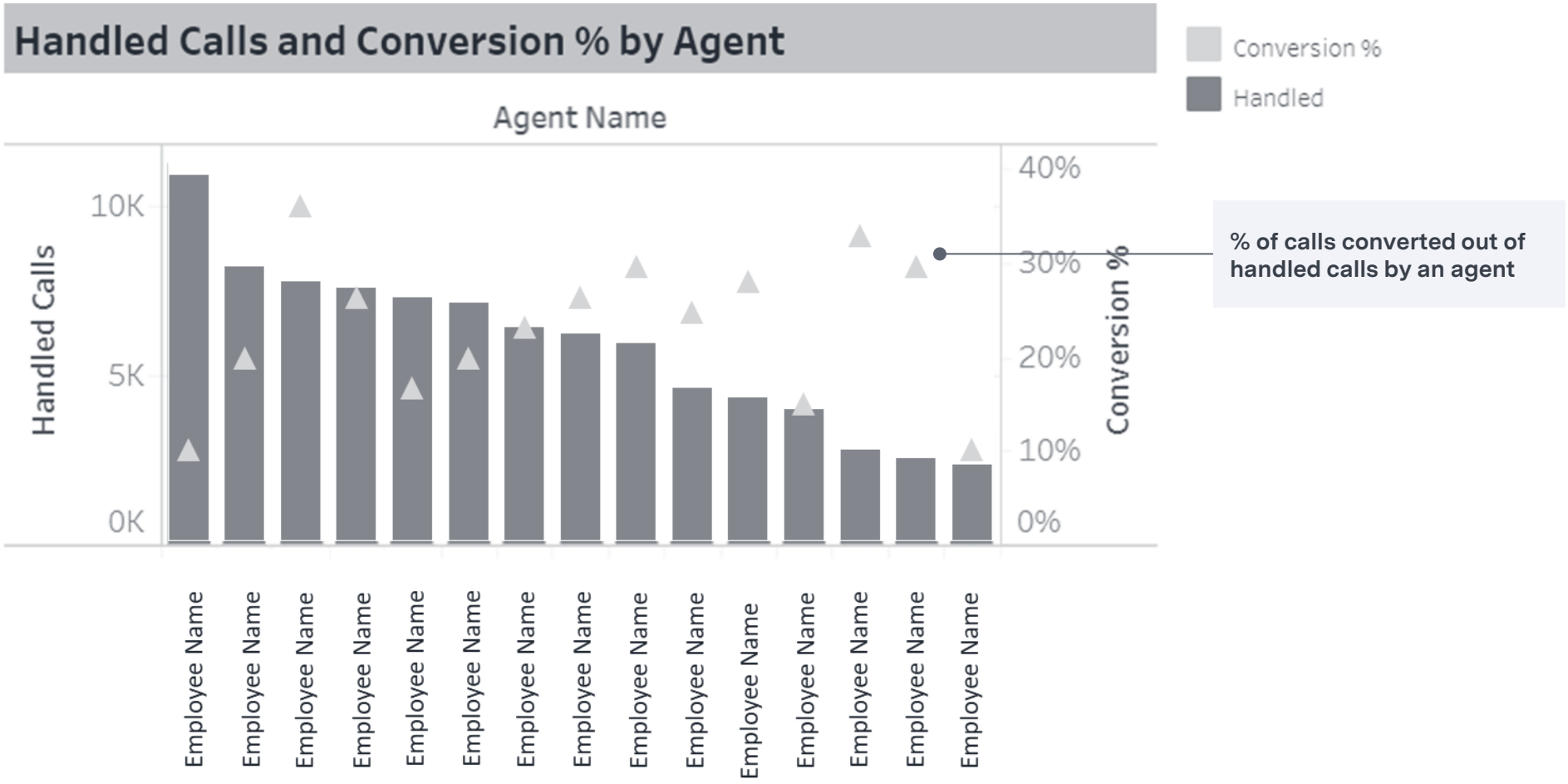
Scale: Booked orders / No. of Answered Calls

Dashed line indicates the conversion goal of 30%

Solid line shows the overall performance of team

© 2024 Accordion CONFIDENTIAL

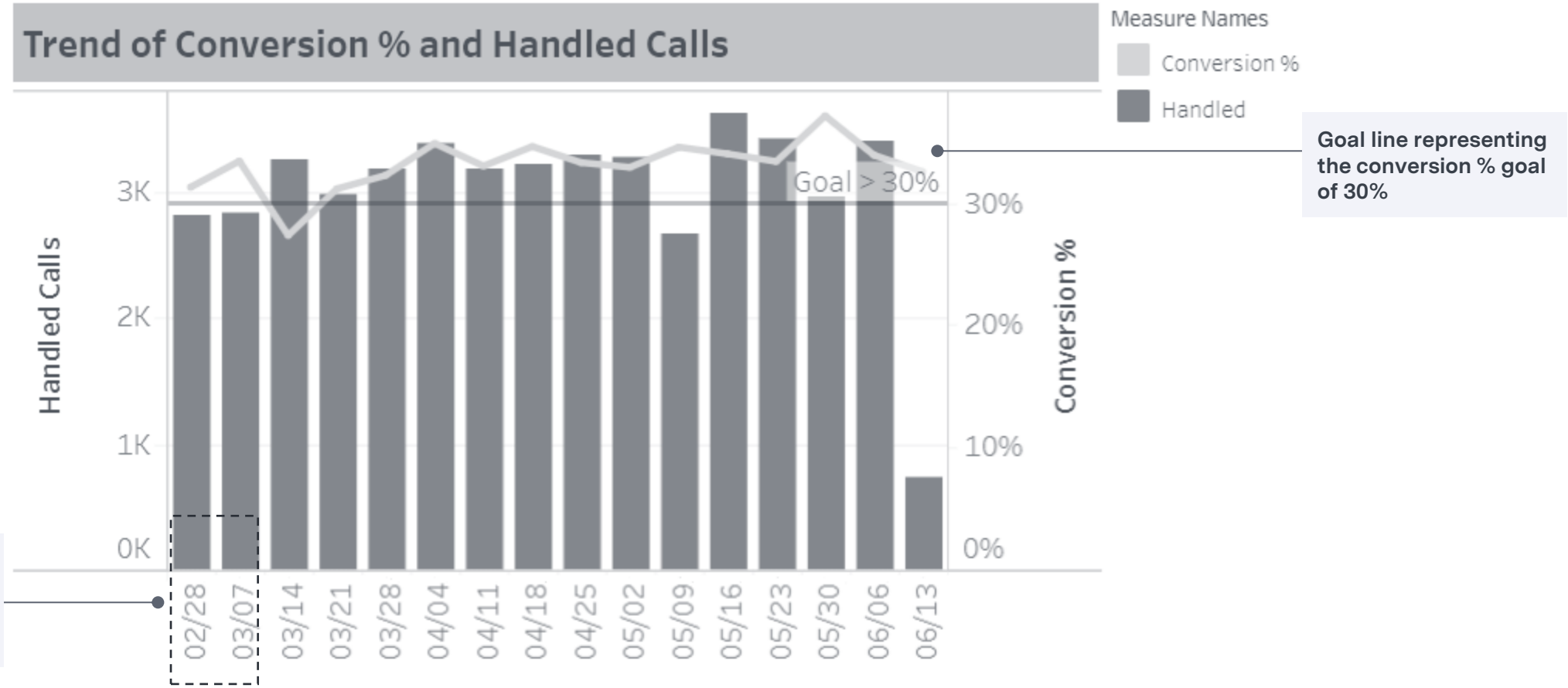
Agent-wise performance (2/2)



% of calls converted out of handled calls by an agent

© 2024 Accordion CONFIDENTIAL

Performance trend view



Goal line representing the conversion % goal of 30%

X axis representing WoW, this can be changed to DoD or MoM

© 2024 Accordion CONFIDENTIAL