

# Stakeholder Requirements Document: Google Fiber

## First Contact

**BI Professional:** Kolton Gross

**Client/Sponsor:** Emma Santiago, Hiring Manager

**Business problem:** The project team needs to understand how often customers call back in after first contact, as this will help leaders understand whether the team is able to answer questions the first time. Leaders want to explore trends in repeat calls to identify why customers are calling more than once, and see how they can improve the customer experience. As such, a dashboard to reveal insights about repeat callers is needed.

**Primary Question:** How often are customers repeatedly contacting the customer service team?

### **Stakeholders:**

- Emma Santiago, Hiring Manager
- Keith Portone, Project Manager
- Minna Rah, Lead BI Analyst
- Ian Ortega, BI Analyst
- Sylvie Essa, BI Analyst

**Stakeholder usage details:** Leaders will use the dashboard to see whether their teams are able to answer questions the first time, understand why customers are calling multiple times, and see how to improve the customer experience.

**Primary requirements:** (What requirements must be met by this BI tool in order for this project to be successful?)

- A chart or table measuring repeat calls by their first contact date
- A chart or table exploring repeat calls by market and problem type
- Charts showcasing repeat calls by week, month, and quarter
- Provide insights into which customer issues seem to generate more repeat calls
- Explore repeat caller trends in the three different market cities
- Design charts so that stakeholders can view trends by week, month, quarter, and year.

# Project Requirements Document: Google Fiber First Contact

**BI Analyst:** Kolton Gross

**Client/Sponsor:** Emma Santiago, Hiring Manager

**Purpose:** The Call Center team is wanting to understand more about how often customers phone customer support again after the first contact, as this will allow leaders to understand whether their teams are able to answer customer questions the first time. Leaders want to explore trends in repeat calls to identify why customers are having to call more than once, as well as see how to improve the overall customer experience.

**Key dependencies:** (Detail the major elements of this project. Include the team, primary contacts, and expected deliverables.)

The datasets are fictionalized versions of actual data that this team works with, and as such is already anonymized and approved. However, I will need to ensure all stakeholders are able to view all datasets so they are able to follow the steps taken.

## Project Team Members:

- Ian Ortega, BI Analyst
- Sylvie Essa, BI Analyst

**Primary Contacts:** Emma Santiago, Keith Portone

**Stakeholder requirements:** (List the established stakeholder requirements, based on the Stakeholder Requirements Document. Prioritize the requirements as: R - required, D - desired, or N - nice to have.)

R - A chart or table measuring repeat calls by their first contact date

R - A chart or table exploring repeat calls by market and problem type

D - Charts showcasing repeat calls by week, month, and quarter

R - Include a chart that stakeholders can use to view trends by week, month, quarter, and year

D - Provide insights into the types of customer issues that seem to generate more repeat calls

R - Explore repeat caller trends in the three different market cities

**Success criteria:** (Clarify what success looks like for this project. Include explicit statements about how to measure success. Use SMART criteria.)

**Specific:** Insights must identify how often customers are calling back after first contact.

Dashboard should demonstrate which user issues generate more repeat calls

**Measurable:** Evaluate each call using number of calls, number of repeat, call type, market city, and date. For example, do certain call types result in more calls? Do certain market cities have a larger number of repeat callers?

**Action-Oriented:** Prove how often teams are able to successfully resolve calls at first contact to give insight into customer satisfaction.

**Relevant:** All metrics should support creating a better customer experience

**Time-Bound:** Analyze repeat calls throughout the weeks, months, and quarters over at least one year.

**User journeys:** (Document the current user experience and the ideal future experience.)

Google Fiber is trying to see how successfully their teams are able to answer questions during their first contact. This dashboard will provide leaders with insight regarding repeat caller volumes in different markets, and help them understand how to create a better customer experience.

**Assumptions:** (Explicitly and clearly state any assumptions you are making.)

Customers are calling back multiple times for some issues.

The data lists five problem types:

- Type\_1 is account management
- Type\_2 is technician troubleshooting
- Type\_3 is scheduling

- Type\_4 is construction
- Type\_5 is internet and wifi

Additionally, the dataset also records repeat calls over seven day periods. The initial contact date is listed as contacts\_n. The other call columns are then contacts\_n\_number of days since first call. For example, contacts\_n\_6 indicates six days since first contact.

Customers may call back for a different issue than the first contact issue, however for the purpose of this dashboard, we are assuming that their repeat calls are regarding the same issue.

#### **Compliance and privacy:**

Data has already been anonymized, just need to ensure that stakeholders are able to access all datasets needed.

#### **Accessibility:**

There must be large font and text-to-speech alternatives available.

#### **Roll-out plan:**

Need more information, not provided with a time frame. (exemplar states that it was requested to have it completed in six weeks, that is listed nowhere.)

# Strategy Document: Google Fiber First Contact

## Sign-off matrix:

Name	Team / Role	Date

**Proposer:** Emma Santiago, Hiring Manager

**Status:** **[Draft]** > Under review > Implemented | Not implemented (Highlight current status)

**Primary dataset:** market\_1, market\_2, market\_3

**Secondary dataset:**

## User Profiles

Emma Santiago, Hiring Manager

Keith Portone, Project Manager

Minna Rah, Lead BI Analyst

Ian Ortega, BI Analyst

Sylvie Essa, BI Analyst

## Dashboard Functionality

Dashboard Feature	Your Request
Reference dashboard (Should this dashboard be modeled on an existing dashboard? If so, provide a link and describe the similarity.)	N/A
Access (How should access to the dashboard be limited? Who needs to have access?)	All user profiles should be granted read-only access
Scope (What data should be included or excluded in this dashboard?)	<ul style="list-style-type: none"><li>• Number of calls</li><li>• Number of repeat calls after first contact</li><li>• Call type</li><li>• Market city</li><li>• Date</li></ul>

Date filters and granularity (Should the dashboard include date filters? If so, what time frame should be displayed by default? Should the dashboard include a “granularity” drop-down? If so, what granularity should be selected by default?)	Date filters should include Week, Month, Quarter, and Year  Granularity should allow any chart with detail metrics to click on a metric to view specific information
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## Metrics and Charts

Create a table for each chart that you’d like to include in the dashboard. If you’d like to break the dashboard under different headers, feel free to list those here as well.

### Chart 1

Chart Feature	Your Request
Chart title	<b>Market Calls by Type</b>
Chart type (What type of chart needs to be created?)	Pie Chart
Dimension(s) (What dimensions does this chart need to include?)	Call Type Market Date
Metric(s) (What metrics are relevant to this chart?)	Contact

### Chart 2

Chart Feature	Your Request
Chart title	<b>Repeat Calls by Week, Month, and Quarter</b>
Chart type (What type of chart needs to be created?)	Bar
Dimension(s) (What dimensions does this chart need to include?)	Date Repeat Call Counts
Metric(s)	Date

(What metrics are relevant to this chart?)	
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### Chart 3

Chart Feature	Your Request
Chart title	<b>Problem Type Frequency</b>
Chart type (What type of chart needs to be created?)	Pie
Dimension(s) (What dimensions does this chart need to include?)	Call Type Contact
Metric(s) (What metrics are relevant to this chart?)	Contact

### Chart 4

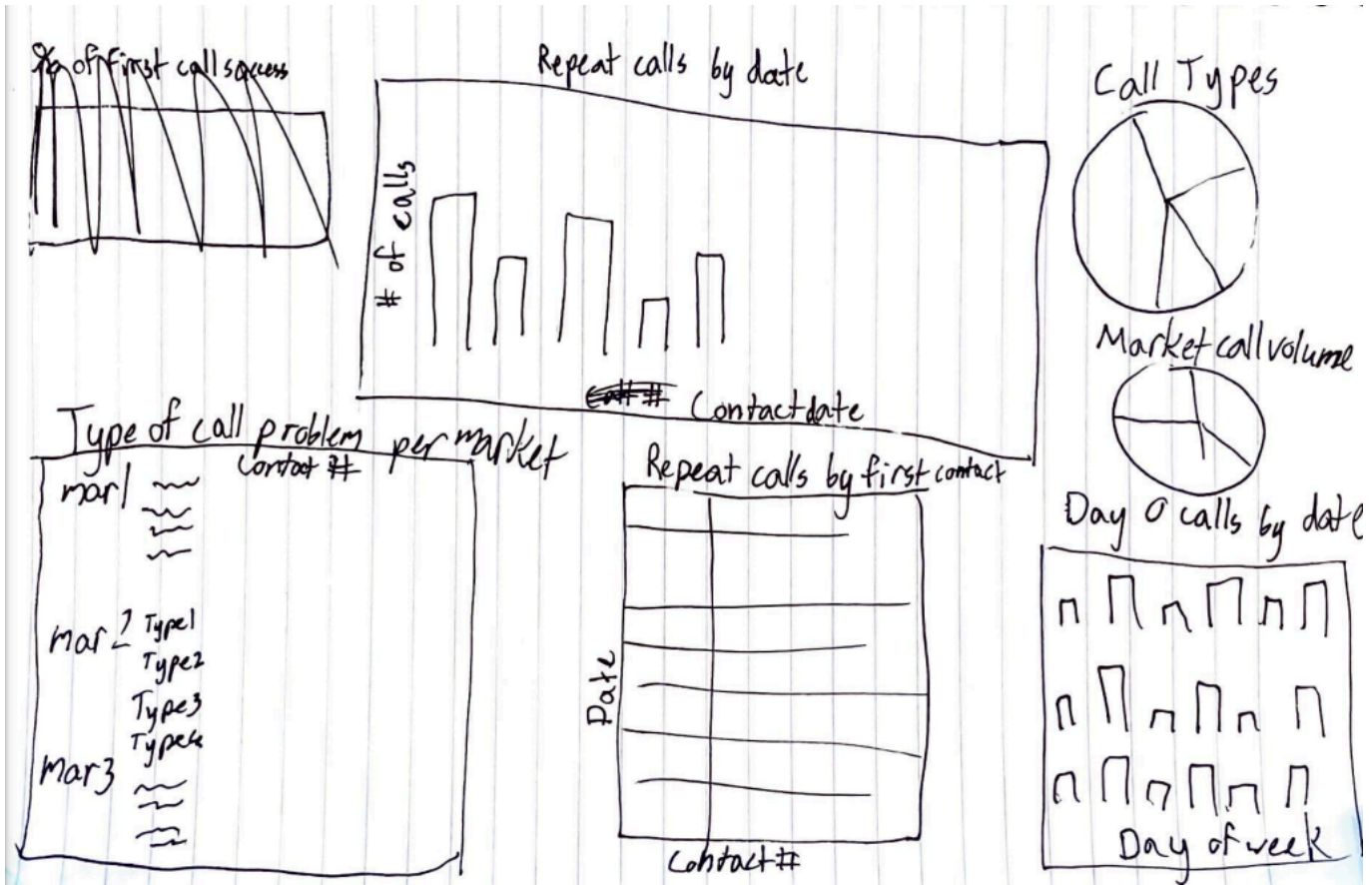
Chart Feature	Your Request
Chart title	<b>Repeat Calls by Date</b>
Chart type (What type of chart needs to be created?)	Line
Dimension(s) (What dimensions does this chart need to include?)	Repeat Calls Date
Metric(s) (What metrics are relevant to this chart?)	Number of Calls Number of Repeat Calls Date

### Chart 5

Chart Feature	Your Request
Chart title	<b>Market and Problem Type of First Repeat Calls</b>

Chart type (What type of chart needs to be created?)	Bar
Dimension(s) (What dimensions does this chart need to include?)	Contact_n_1 Call Type Market
Metric(s) (What metrics are relevant to this chart?)	Contact

Dashboard mockup







# First Contact Trends



Kolton Gross



# Agenda

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- Project Overview and Goals (5 mins)
- Data and Analysis (10 mins)
- Recommendations (3 minutes)
- Actionable Steps (3 minutes)
- Questions (5 minutes)


# Project Goals

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- Understand how often customers call again after first contact
- Provide Insights into which issues generate the most repeats

# The Data

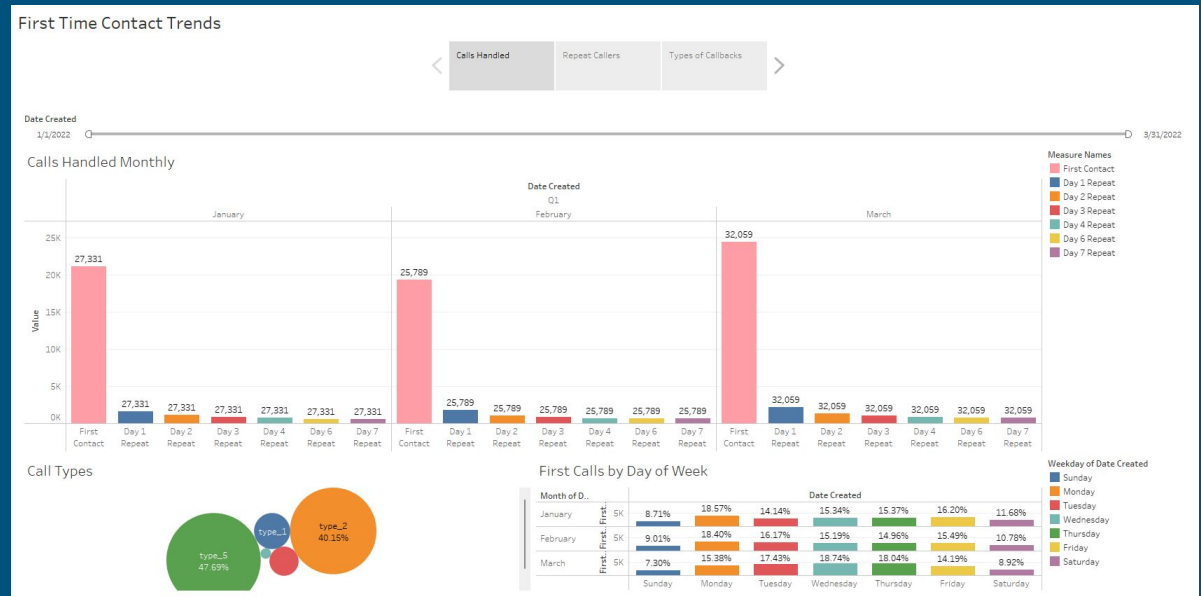
- Pre anonymized
- Covers three markets
- Working within Tableau

Fields			
Type	Field Name	Physical Table	Rem...
	Date Created	bquxjob_7f6f205a_191c...	date_...
#	First Contact	bquxjob_7f6f205a_191c...	conta...
#	Day 1 Repeat	bquxjob_7f6f205a_191c...	conta...
#	Day 2 Repeat	bquxjob_7f6f205a_191c...	conta...
#	Day 3 Repeat	bquxjob_7f6f205a_191c...	conta...
#	Day 4 Repeat	bquxjob_7f6f205a_191c...	conta...
#	Day 5 Repeat	bquxjob_7f6f205a_191c...	conta...
#	Day 6 Repeat	bquxjob_7f6f205a_191c...	conta...
#	Day 7 Repeat	bquxjob_7f6f205a_191c...	conta...
Abc	Call Type	bquxjob_7f6f205a_191c...	new_t...
Abc	Market	bquxjob_7f6f205a_191c...	new_...
=#	Total Calls	Calculation	Calcul...

# Calls Handled

- Type 2 & 5

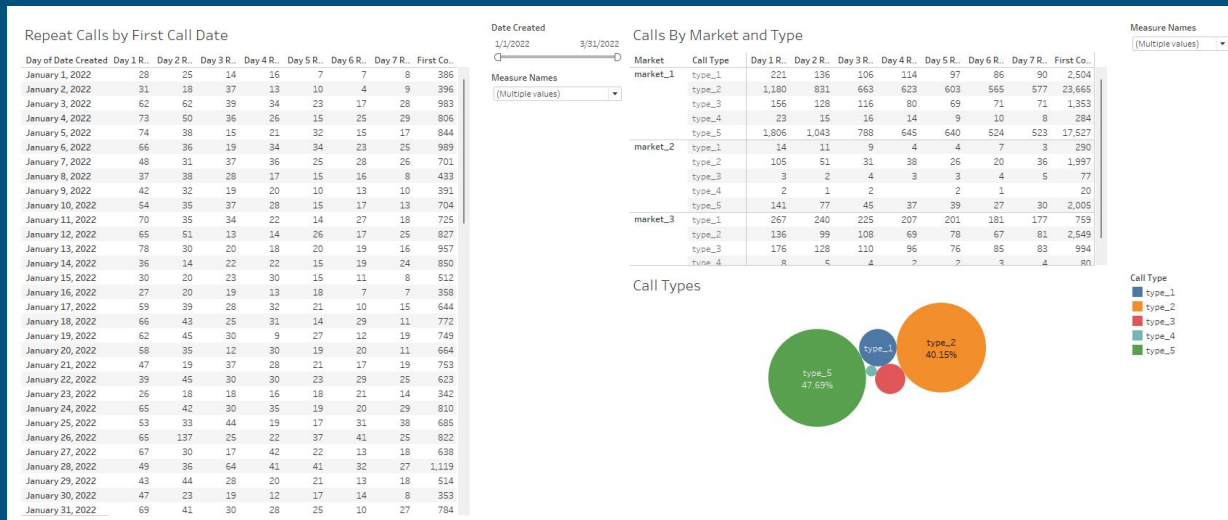
- Busy Days



# Repeat Callers

- Market 1 volume

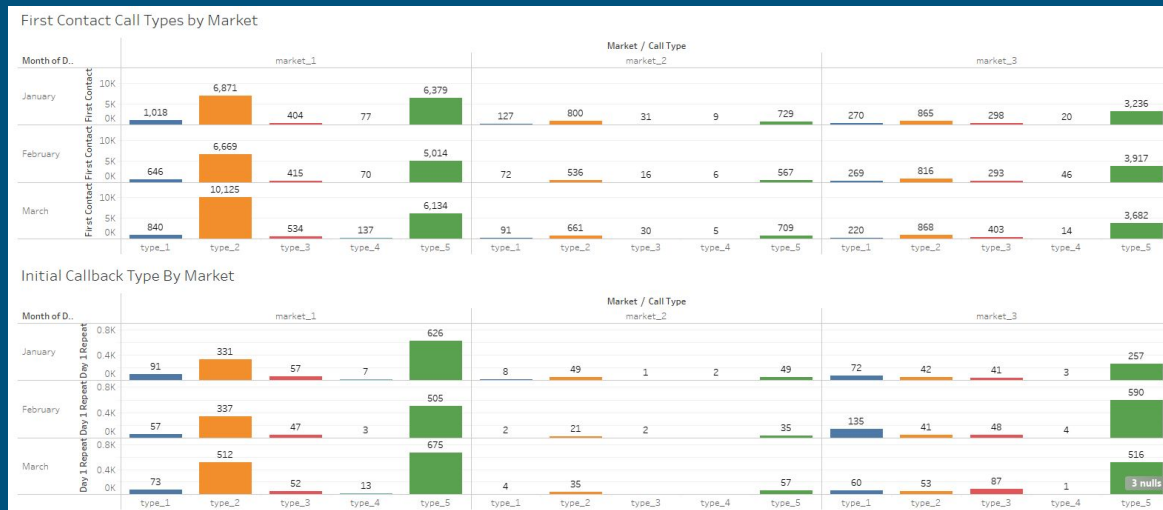
- Type 1 at Market 3



# Trends

- Type 3

- Type 5



# Recommendations

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- Deep dive into 5
- Look into Type 1 issues



# Questions?

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Anything questions?

