

# **Interactive Call Centre Agent Performance Dashboard (Excel)**

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## 1. Executive Summary

This project delivers an interactive Excel dashboard that analyzes and ranks call-centre agents (R01–R05) using key metrics — calls handled, call duration, purchase amount, and customer satisfaction. The dashboard and supporting PivotTables provide fast, data-driven insights to improve staffing, incentives, and agent coaching, enabling operations teams to make evidence-based decisions.

## 2. Business Objective

- Measure and compare agent performance across calls, revenue, duration, and satisfaction.
- Provide an interactive tool for operations managers to review, compare, and rank agents.
- Identify opportunities to optimize staffing, incentives, and training to increase revenue and customer satisfaction.

## 3. Dataset Overview

- Single Excel workbook containing call-level transaction records.
- Key fields: Call Number, Customer ID, Date of Call, Representative (R01–R05), Duration, Purchase Amount, Satisfaction Rating (1–5), Fiscal Year, Day of Week, Duration Bucket, Rounded Rating, Gender, Age, City.
- The workbook contains raw data, PivotTables (analytical summaries), and the interactive dashboard (slicers and visuals).

## 4. Methodology

### Data Preparation

- Cleaned and standardized raw call records (removed duplicates, normalized date/time and numeric fields)

### Pivot Analysis

- Built PivotTables for agent-level counts and sums, monthly trends, day-of-week distributions, rating histograms, and city/gender breakdowns

### Dashboard Design

- Constructed an interactive dashboard using Pivot-driven charts, KPI cards, slicers (Representative), conditional formatting, and dynamic images for quick interpretation.

## 5. Dashboard Description

- **Representative slicer (R01–R05):** Selecting a rep filters all KPIs, charts, and tables.

- **KPI cards:** Total Calls, Total Purchase Amount, Total Duration, Average Rating, Happy Callers.
- **Agent ranking:** Visual rank (1–5) based on combined performance metrics (calls, revenue, duration).
- **Trends & distributions:** Monthly call trend, day-of-week activity, rating distribution histogram.
- **Demographics:** Gender vs city stacked comparisons and customer-level purchase table with heatmap formatting.



Figure 1: Interactive Excel Dashboard (Representative-level filtering and KPIs)

## 6. Key Insights

- Agent performance is uneven: a small subset of reps drives a disproportionate share of calls and purchase amounts.
- Top-ranked agents consistently show higher call volumes and revenue contributions.
- Distinct monthly and weekday peaks indicate opportunities to realign staffing to demand.
- Most customer satisfaction ratings cluster between 3 and 5, with a minority of low-rated interactions requiring coaching.
- City-level analysis reveals regional differences in purchase behavior and satisfaction.

## **7. Business Impact**

- Enables rapid weekly performance reviews and data-driven incentive decisions.
- Improves operational planning by aligning staffing to observed demand peaks.
- Helps prioritize coaching for agents with lower satisfaction despite high output.
- Reduces manual reporting time by replacing spreadsheet aggregation with an interactive tool.

## **8. Recommendations**

- Use the dashboard for weekly agent scorecards and monthly incentive planning.
- Reallocate staff to high-demand days/months indicated by the Call Trend.
- Investigate agents with high revenue but low satisfaction for targeted coaching.
- Maintain regular data refresh and add time-based slicers (Month/Year) for deeper trend analysis.

## **9. Conclusion**

The Interactive Call Centre Agent Performance Dashboard provides a compact, actionable way to monitor agent effectiveness, support operational decisions, and drive improvements in both revenue and customer satisfaction; it is readily shareable as PDF snapshots for stakeholder reporting and can be extended with automated refresh and additional performance weighting.