Project Report: CRM Operations Dashboard for Background Verification

# 1. Objective

The objective of this project is to create an interactive Tableau dashboard that helps monitor and analyze key metrics for Background Verification (BGV) operations. This includes tracking SLA compliance, turnaround times (TAT), agent performance, request statuses, and client feedback using simulated CRM data.

# 2. Dataset Description

The dataset simulates CRM request data with the following fields:  
- Request\_ID  
- Client\_Name  
- Request\_Date  
- Assigned\_Agent  
- Status (Completed, In Progress, Delayed, On Hold)  
- TAT\_Days (Turnaround Time)  
- SLA\_Breached (Yes/No based on TAT)  
- Verification\_Type (Employment, Education, Criminal Check, Address Check)  
- Region (North, South, East, West)  
- Feedback\_Score (1 to 5, only for Completed requests)

# 3. Dashboard Features

- KPI Scorecards for Total Requests, Completed Verifications, Average TAT, and SLA Breaches  
- Status Breakdown using Pie/Donut Chart  
- Line Chart showing TAT trends over time  
- Agent Performance tracked by number of Completed cases and Feedback Score  
- SLA Compliance by Client Name  
- Filters for Region, Verification Type, Agent, and Date Range

# 4. Business Use Cases

- Monitor SLA adherence and identify patterns in TAT delays  
- Recognize top-performing agents and areas needing training  
- Provide SLA insights per client to account managers  
- Optimize request allocation to improve verification efficiency

# 5. Tools Used

• Tableau  
• Microsoft Excel (CSV format)  
• Microsoft Word (for documentation)

# 6. Summary

This project demonstrates how BGV operations can leverage Tableau for visual insights into daily verification performance. By simulating real-time CRM data, it enables operational heads and analysts to improve SLA compliance and customer satisfaction.

## 📊 Steps to Build the Tableau Dashboard (Using BGV\_CRM\_Data.csv)

### 🔧 Step 1: Connect Your Data

* Open **Tableau Desktop or Tableau Public**
* Click **"Text File"**
* Select the downloaded file: BGV\_CRM\_Data.csv

### 🧱 Step 2: Create Worksheets

#### ****1. KPI Cards****

Drag and drop to create:

* Total Requests → COUNT(Request\_ID)
* Completed Requests → COUNTIF(Status = 'Completed')
* Average TAT → AVG(TAT\_Days)
* SLA Breaches → COUNTIF(SLA\_Breached = 'Yes')

#### ****2. Status Overview****

* Pie or donut chart
* Dimension: Status
* Measure: COUNT(Request\_ID)

#### ****3. TAT Trend****

* Line chart with:
  + Columns: Request\_Date (convert to "Month" or "Day")
  + Rows: AVG(TAT\_Days)

#### ****4. Agent Performance****

* Bar chart with:
  + Rows: Assigned\_Agent
  + Columns: COUNTD(Request\_ID)
  + Color: by AVG(Feedback\_Score)

#### ****5. SLA Breaches by Client****

* Bar chart with:
  + Rows: Client\_Name
  + Columns: COUNTIF(SLA\_Breached = 'Yes')

### 🧰 Step 3: Create Filters

Add filters to dashboard:

* Region
* Verification\_Type
* Request\_Date (range)
* Status

### 🧩 Step 4: Build Dashboard

* Click on "New Dashboard"
* Drag all worksheets
* Arrange layout: KPIs on top, charts below
* Add filters on the right side for interactivity

### 📝 Optional Enhancements

* Add tooltips to show full client request details