Optimizing RWFD Call Center Operations

Insights and Recommendations

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**2023JULB01349**

Contents

Introduction

The RWFD Call Center plays a critical role in delivering exceptional customer service, aiming to resolve customer queries efficiently and maintain a high level of satisfaction. As a vital touchpoint between the organization and its customers, the call center's performance directly impacts the company's reputation and customer loyalty.

However, recent performance metrics indicate that there are areas for improvement that could significantly enhance the quality of service provided. Key performance indicators, such as Service Level Agreement (SLA) compliance, Customer Satisfaction (CSAT) scores, call volume and duration, and customer sentiment, highlight several opportunities to optimize operations and better meet customer expectations.

This report analyzes the current performance of the RWFD Call Center, identifying the primary challenges impacting service delivery. It proposes actionable objectives and goals to improve key areas, such as increasing SLA compliance, enhancing customer satisfaction, optimizing call handling efficiency, and reducing negative sentiment. By addressing these challenges, the RWFD Call Center can elevate its service quality, drive customer loyalty, and reduce operational inefficiencies, ultimately contributing to long-term success for the organization.

Business Dashboard
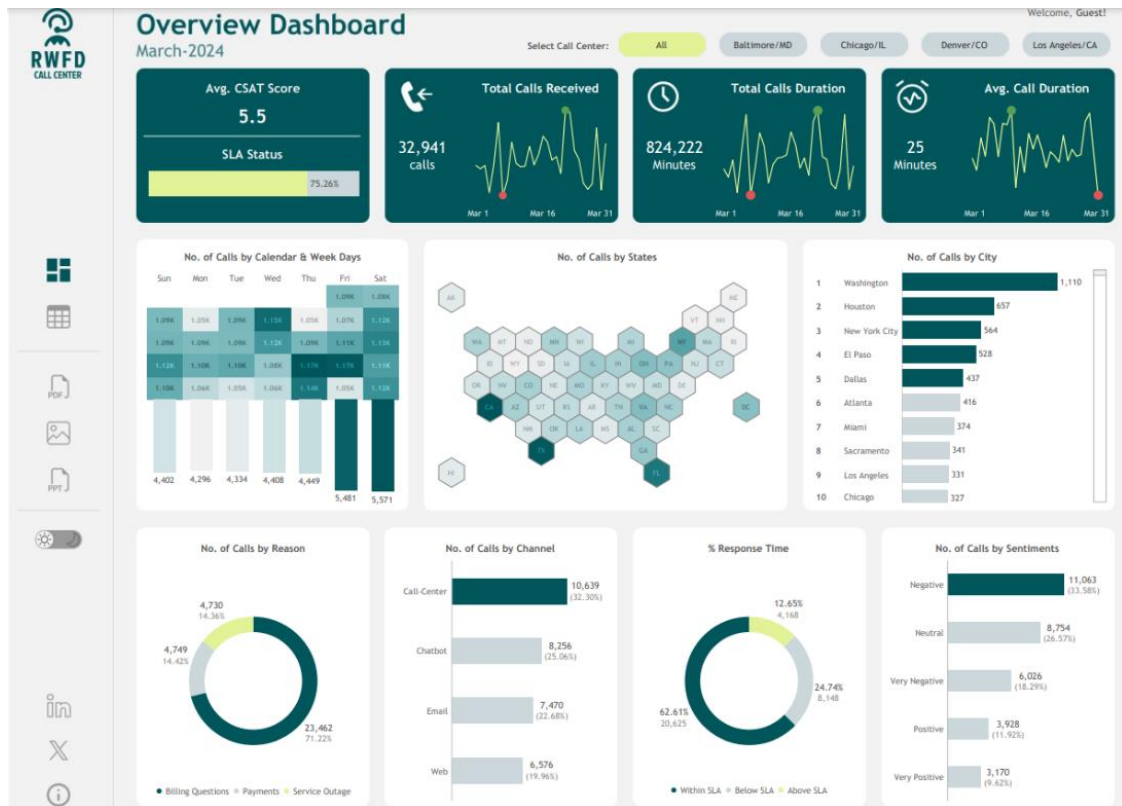
Business Problem

Defining the Business Need and Problem:

RWFD Call Center aims to provide exceptional customer service by ensuring timely resolution of queries, effective issue management, and maintaining a high level of customer satisfaction. However, based on the performance dashboard, there are key areas that need attention:

- **Inconsistent SLA Compliance**: The Service Level Agreement (SLA) status is at 75.26%, which means nearly 25% of calls are not being handled within the agreed timelines. This could lead to customer dissatisfaction and damage the reputation of the call center.

- **Average CSAT Score**: With a CSAT (Customer Satisfaction) score of 5.5, there is significant room for improvement. The current score indicates that customers are moderately satisfied, but improving it could lead to increased customer loyalty and reduced churn.

- **High Call Volume and Duration**: The call center has handled 32,941 calls with a total duration of 824,222 minutes, and the average call duration is 25 minutes. The lengthy call times may indicate inefficiencies in addressing customer issues and could contribute to higher operational costs.

- **Negative Customer Sentiment**: Around 33.58% of calls were categorized as "negative" sentiment. Addressing the root causes of customer dissatisfaction is crucial to improving overall service quality.

Objectives and Goals:

The primary objectives for RWFD Call Center include:

- **Improving SLA Compliance**: Increase the percentage of calls handled within SLA to at least 90%.

- **Enhancing Customer Satisfaction**: Raise the CSAT score from 5.5 to 7 or higher by reducing response times, improving issue resolution quality, and providing more personalized customer service.

- **Optimizing Call Handling**: Reduce the average call duration without compromising service quality, aiming for a more efficient resolution process to handle a higher volume of calls.

- **Reducing Negative Sentiment**: Decrease the percentage of calls categorized as negative by identifying and resolving key pain points for customers, potentially through training and better support tools.

Data Requirement

Key Data Attributes Required to Address the Business Problem:

To effectively analyse and address the business problem, the following key data attributes are essential:

- **Call Data**:

  o **Total Calls Received**: A measure of the volume of calls the center handles over a specific period.

  o **Call Duration**: Insights into the time taken to handle each customer query. Analysing long-duration calls could reveal inefficiencies in the process.

  o **Time of Calls (Date and Weekday)**: Understanding call patterns by day of the week helps allocate resources effectively.

  o **Call Origin (State/City)**: Helps identify geographical trends in call volume, providing insights for region-specific issues or campaigns.

- **SLA Data**:
  - **SLA Compliance Status**: The percentage of calls handled within the agreed service level. Calls handled below SLA should be analyzed for reasons, whether it is due to longer wait times or insufficient resources.

- **Customer Sentiment Data**:
  - **Sentiment Scores**: Breakdown of customer sentiment into categories (e.g., very negative, negative, neutral, positive, very positive). This helps understand the overall customer experience.
  - **Sentiment by Reason for Call**: Understanding which issues or service areas drive negative sentiment.

- **Customer Satisfaction (CSAT) Score**:
  - This score reflects overall customer satisfaction and can be segmented by different factors (call type, channel, issue reason) to pinpoint areas of improvement.

- **Call Channel**:
  - **Call-Center, Chatbot, Email, Web**: Analyzing how each channel performs will provide insights into where improvements are needed. For example, if chatbots or email channels have longer resolution times, optimizing these channels could reduce load on the call center.

Metrics and Parameters to Consider:

- **Call Handling Metrics**:
  - **Average Call Duration**: A lower average duration without sacrificing quality indicates more efficient operations.
  - **First Contact Resolution (FCR)**: Percentage of calls resolved in the first interaction. This metric ties into call efficiency and customer satisfaction.

- **SLA and Response Time**:
  - **Percentage of Calls Within SLA**: Critical to ensure timely responses to customer queries.
  - **Response Time Metrics**: Measure how quickly calls and queries are addressed across channels (call-center, chatbot, etc.).

- **Customer Sentiment and Satisfaction**:
  - **CSAT Score**: A direct measure of customer satisfaction, this metric should be analyzed regularly to track improvement.

- **Sentiment Analysis**: Understanding customer emotions and responses can provide insights into service areas requiring immediate attention.

These data points and metrics will be crucial in identifying performance gaps, improving service efficiency, and driving better customer satisfaction outcomes.

Data Collection and Data Understanding

Source of Data:

The data used in the RWFD Call Center performance dashboard likely comes from various internal systems and external sources that track customer interactions, call logs, and satisfaction metrics. The primary data sources include:

- **Internal Call Center Systems**: This is the central source of data for the RWFD Call Center, capturing details about incoming calls, call durations, agent performance, and SLA compliance. The call management system logs every interaction and is crucial for tracking operational metrics.

- **Customer Relationship Management (CRM) System**: Data on customer profiles, sentiment analysis, and issue resolution details may come from a CRM system. It allows the call center to link customer interactions with broader customer service data.

- **Sentiment Analysis Tools**: These tools process call transcripts or interactions using natural language processing (NLP) techniques to evaluate customer sentiment. They may be integrated into the call center's systems or gathered from third-party sentiment analysis APIs.

- **External APIs**: RWFD may use external APIs to augment the internal data, particularly for benchmarking performance (such as industry standards for SLA or CSAT scores). These APIs could also provide insights into trends or patterns in customer service and sentiment analysis.

- **Surveys and Feedback Forms**: Post-call customer satisfaction surveys and feedback forms play a crucial role in understanding customer sentiment and experience. This data is usually gathered automatically at the end of a service interaction through follow-up messages or automated phone systems.

Characteristics of the Data:

The data collected for call center performance and customer satisfaction comes in various forms and has specific characteristics that impact its usage and analysis. These include:

- **Format**:

- **Structured Data**: The majority of the data collected is structured and stored in relational databases or data warehouses. This includes call logs, timestamps, agent performance metrics, and customer demographic data.

- **Unstructured Data**: Call transcripts, customer comments from surveys, and recorded voice data are examples of unstructured data. This data may need to be processed using advanced techniques such as text mining or sentiment analysis tools.

- **Volume**:

  - The call center handles a large volume of interactions, with 32,941 calls logged in March 2024 alone. Each call generates multiple data points including timestamps, agent details, call duration, customer sentiment, and follow-up actions. High-volume data requires scalable systems for storage and processing.

  - Additionally, survey responses and feedback forms can generate thousands of entries, adding to the volume of data collected monthly.

- **Variety**:

  - **Call Center Logs**: These logs provide detailed, timestamped records of each customer interaction, including call length, agent ID, customer ID, and issue type.

  - **Sentiment Scores**: The sentiment data from calls or post-interaction feedback is likely categorized into several tiers (e.g., very negative, negative, neutral, positive, very positive).

  - **CSAT Scores**: These scores come from post-call surveys where customers rate their satisfaction, often on a scale from 1 to 10.

  - **Geographical Data**: Data showing where calls are originating from (by state and city) provides insights into geographical trends in customer service demand.

  - **SLA Compliance**: SLA (Service Level Agreement) data tracks the percentage of calls that meet the required resolution time standards.

Data Variety and Relevance:

- **Quantitative Data**:

  - Call volumes, SLA compliance rates, CSAT scores, and call durations are key performance metrics that are quantitative in nature. These data points are crucial for identifying trends and measuring performance against targets.

- **Qualitative Data**:

  - Customer sentiment and feedback from surveys provide qualitative insights into customer experience and satisfaction. These data points may be more challenging to analyze but are essential for understanding the root causes of customer dissatisfaction.

Understanding the various sources and characteristics of the data is critical to addressing the business problem effectively. By leveraging both structured and unstructured data, RWFD Call Center can gain a comprehensive view of its performance and make informed decisions to improve operational efficiency, customer satisfaction, and sentiment.

Data Validation (Bias/Transparency/Reliability)

Checking for Biases in Data:

Bias in data can distort the insights and lead to ineffective decision-making. For RWFD Call Center's performance analysis, it is essential to carefully check for different types of biases that could impact the accuracy and fairness of the findings:

1. **Demographic Bias**:

   - **Definition**: Demographic bias occurs when the data disproportionately represents certain customer segments based on age, gender, location, or income, leading to skewed analysis.

   - **Example**: If the majority of calls come from certain cities or states (e.g., Washington and Houston as shown in the dashboard), the analysis might overly focus on the needs and experiences of customers in these areas, while neglecting smaller regions like Montana or Wyoming. This can result in recommendations that don't fully address the needs of the entire customer base.

   - **Mitigation**: Ensuring data collection includes a balanced representation of all geographic regions and demographic groups is important. Stratified sampling could help ensure that smaller but significant segments are also represented in the analysis.

2. **Temporal Bias**:

   - **Definition**: Temporal bias refers to inconsistencies in data due to the time period during which it was collected. Seasonality and specific events can impact customer behavior.

   - **Example**: March might see higher call volumes due to tax season or holiday periods, skewing the performance metrics like total call duration or average call handling time. Comparing this month with non-seasonal

months without accounting for seasonality could lead to inaccurate conclusions.

- o **Mitigation**: Temporal patterns should be identified, and comparisons should be normalized for seasonality. Additionally, looking at data across multiple months can provide a more reliable picture of overall performance.

3. **Sampling Bias**:

- o **Definition**: Sampling bias occurs when the data collected does not represent the full population of interest.

- o **Example**: If customer feedback surveys are only sent to a small subset of customers who completed calls or were helped by specific agents, the resulting CSAT score or sentiment analysis might not reflect the entire call center's performance.

- o **Mitigation**: Randomized sampling and ensuring all customer interactions are considered in survey feedback could help reduce this bias. The sampling frame should be inclusive of all customer interactions, not just those with extreme outcomes (e.g., very satisfied or very dissatisfied customers).

Assessing Data Reliability:

Reliable data is critical to ensure that the findings and recommendations from the analysis are accurate and actionable. Here are key factors to assess the reliability of the data:

1. **Accuracy**:

- o **Definition**: Data accuracy refers to the correctness and completeness of the data collected.

- o **Example**: Call durations, SLA times, and CSAT scores need to be logged accurately without missing entries or duplicate records. Missing or erroneous data points can lead to incorrect calculations of performance metrics.

- o **Mitigation**: Regular data audits and validation processes should be conducted to ensure that the data is accurate and complete. For example, checking if call start and end times are properly recorded or if any anomalies (e.g., negative call durations) exist.

2. **Consistency**:

- o **Definition**: Data consistency involves ensuring that data collected across different channels and time periods follows a standardized format and measurement methodology.

- **Example**: If different call centers (e.g., Chicago, Baltimore) log data in different formats or with different performance benchmarks, it becomes difficult to compare performance across centers.

- **Mitigation**: Implementing uniform data collection standards across all call centers ensures consistency. A centralized data warehouse that integrates data from different sources into a consistent format is important for reliable analysis.

3. **Completeness**:

    - **Definition**: Completeness refers to having all necessary data points for comprehensive analysis.

    - **Example**: If sentiment data is missing for a large number of calls or feedback surveys are incomplete, it could skew the analysis of customer satisfaction and call outcomes.

    - **Mitigation**: Ensuring that the data collection processes are thorough and complete, particularly for key metrics like call duration, customer satisfaction, and SLA compliance, will increase the reliability of the insights derived.

4. **Timeliness**:

    - **Definition**: Data timeliness refers to the up-to-date nature of the data. Outdated data may not accurately reflect current performance.

    - **Example**: Analyzing data from several months ago may not account for recent changes in call volume or new initiatives aimed at improving customer satisfaction.

    - **Mitigation**: Real-time data feeds or frequent updates should be used to ensure that the analysis reflects the most current performance trends and operational realities.

Transparency of Data:

Transparency in data collection, analysis, and reporting ensures that the insights drawn from the data are credible and can be verified by all stakeholders.

1. **Data Collection Transparency**:

    - **Definition**: Transparency in how the data is collected ensures stakeholders understand the source, method, and limitations of the data.

    - **Example**: If sentiment data is being gathered through NLP techniques on call transcripts, it's important to disclose how sentiment is being measured and any limitations of the sentiment scoring method.

- o **Mitigation**: Providing clear documentation on data sources, collection methods, and the algorithms used for sentiment analysis or SLA compliance metrics fosters trust in the data.

2. **Algorithm Transparency**:

   - o **Definition**: If advanced algorithms are used (e.g., for sentiment analysis or predictive modeling), transparency in how they work is essential.

   - o **Example**: Sentiment scores calculated through machine learning models should be transparent to ensure that these models are not introducing bias or inaccuracies in understanding customer feedback.

   - o **Mitigation**: Any AI or machine learning models should have documented methodologies, and stakeholders should be aware of how these models were trained and what data was used to create them.

Bias Mitigation Strategies:

- **Diverse Representation**: Ensuring that data reflects all segments of the customer base, including geographic regions, demographics, and different customer profiles.

- **Audit Trails**: Keeping a detailed log of how data is collected, cleaned, and processed to ensure that stakeholders can trace back any errors or discrepancies.

- **Regular Data Audits**: Periodic checks on the data sources and collection processes to identify any systemic biases or inaccuracies and take corrective action.

- **Benchmarking and Validation**: Cross-checking data against external benchmarks or industry standards can help ensure that data points such as SLA compliance or CSAT scores are realistic and valid.

By rigorously addressing potential biases and ensuring data reliability and transparency, RWFD Call Center can ensure that the insights generated from the dashboard are actionable, accurate, and reflect true performance. This helps build trust with stakeholders and ensures that performance improvement efforts are based on sound data-driven insights.

Data Cleaning (Exploratory Data Analysis - EDA)

Preprocessing Techniques:

Data cleaning is a crucial step in preparing the data for analysis to ensure that the insights derived are accurate, reliable, and free from distortions. Before applying any

analytical models, data should be preprocessed to handle inconsistencies, errors, and missing information.

1. **Handling Missing Values:**

   o **Definition**: Missing values are common in datasets, and they occur when certain data points are not recorded or lost.

   o **Example**: In the RWFD Call Center dashboard, there may be missing values in the sentiment analysis column for some calls if sentiment wasn't captured. Similarly, call duration or customer feedback might be absent for certain interactions.

   o **Techniques to Handle**:

      ▪ **Imputation**: If the percentage of missing data is small, techniques like mean, median, or mode imputation can be applied. For example, if some calls are missing their average call duration, the mean or median duration of other calls could be used to fill the gap.

      ▪ **Deletion**: If entire rows or columns are mostly missing, it might be better to remove these records, especially if imputation could introduce significant errors. However, this method should be used with caution, particularly if valuable information is lost.

      ▪ **Predictive Imputation**: In some cases, machine learning models can predict the missing values based on other available features. For instance, call length might be predicted based on the type of issue and the region the call originated from.

2. **Handling Outliers:**

   o **Definition**: Outliers are data points that significantly deviate from the rest of the dataset and may represent errors or unique cases.

   o **Example**: Extremely long or short call durations could be considered outliers. For instance, a call lasting 2 hours could indicate an unusual issue, while a 10-second call may be incomplete or cut off. Outliers can skew averages, such as inflating the average call handling time.

   o **Techniques to Handle**:

      ▪ **Trimming or Capping**: Outliers can be trimmed (removed) or capped (limited to a certain value) to prevent them from distorting results. For example, calls longer than 90 minutes could be capped at 90 minutes in analysis.

      ▪ **Transformation**: Logarithmic or other mathematical transformations can reduce the impact of outliers on the

analysis. This is especially useful if the outliers are legitimate but need to be normalized for better analysis.

- **Investigation**: Sometimes, outliers provide valuable insights and should not be discarded. For example, unusually long calls may represent serious customer service problems that need to be addressed separately.

3. **Normalization and Standardization**:

   o **Definition**: Normalization (scaling data between 0 and 1) or standardization (scaling data to have a mean of 0 and a standard deviation of 1) is applied when data features have different scales or units.

   o **Example**: In the RWFD Call Center, features like call duration (measured in minutes) and customer satisfaction (measured on a scale of 1-10) have different scales. Without normalization, larger-scaled features (e.g., call duration) may disproportionately affect the analysis.

   o **Techniques to Handle**:

      - **Min-Max Scaling**: All numeric features can be scaled to a common range (e.g., between 0 and 1) to ensure fair comparison. This is important in clustering or machine learning models where feature magnitude can affect the outcome.

      - **Z-score Standardization**: When working with normally distributed data, Z-score standardization can make data more comparable by centering it around zero and scaling it based on the data's standard deviation.

4. **Encoding Categorical Data**:

   o **Definition**: Categorical variables (like call reasons or channels) need to be converted into numeric form for most analytical techniques.

   o **Example**: In the RWFD Call Center, reasons for calls (Billing Questions, Payments, Service Outage) and call channels (Call-Center, Chatbot, Web) are categorical variables.

   o **Techniques to Handle**:

      - **One-Hot Encoding**: This involves creating a binary column for each category. For instance, "Call-Center" would be represented as [1, 0, 0] and "Chatbot" as [0, 1, 0] when encoding the channels.

      - **Label Encoding**: This method assigns a unique integer to each category (e.g., Billing = 1, Payments = 2, Service Outage = 3).

Label encoding is useful when there is an inherent order in the categories.

5. **Data Aggregation**:

   - **Definition**: Aggregating data involves summarizing or combining data points to make analysis more manageable and meaningful.

   - **Example**: Aggregating call durations and customer satisfaction scores by day, region, or issue type can provide high-level insights into trends and problem areas. For instance, aggregating data by the most frequent call reasons can reveal which issues are causing the most calls, helping prioritize resources.

Exploratory Data Analysis (EDA):

EDA helps in understanding the underlying structure of the data, identifying patterns, trends, and potential problems. It involves both descriptive statistics and visual techniques to discover useful information for further analysis.

1. **Identifying Trends in Call Volume**:

   - **Analysis**: By examining call volumes across different days of the week, we can identify peak days (e.g., Fridays and Saturdays with over 1,000 calls each). This indicates a higher workload on these days and can be used to optimize staffing levels and resource allocation.

   - **Visualization**: A bar chart showing daily call volume can visually highlight the trend, indicating the need for increased staffing during high-volume periods.

2. **Patterns in Call Duration**:

   - **Analysis**: EDA can reveal patterns in call duration across different regions, reasons, or channels. For example, billing-related queries may have longer average durations than service outages, indicating more complex issues.

   - **Visualization**: A box plot or histogram can be used to show the distribution of call durations, allowing us to quickly spot outliers or regions where average call durations are consistently high.

3. **Sentiment Analysis Insights**:

   - **Analysis**: The dashboard shows customer sentiment (Positive, Neutral, Negative) for calls. EDA can be used to explore which call reasons or channels have higher negative sentiment. For instance, sentiment analysis can reveal if chatbot interactions lead to more dissatisfaction compared to live agents.

- **Visualization**: A pie chart or bar chart can be used to visualize the proportion of positive, neutral, and negative sentiments, while cross-tabulating this with call reasons or regions can provide deeper insights into the root causes of customer dissatisfaction.

4. **Channel Performance**:

   - **Analysis**: EDA can be used to compare the effectiveness of different channels (e.g., Call-Center, Chatbot, Email) in terms of handling call volume and response time. This can help identify if certain channels are underperforming or are responsible for higher customer dissatisfaction.

   - **Visualization**: A stacked bar chart could be used to show the percentage of calls handled by each channel, combined with average response time and customer satisfaction scores for each channel.

5. **Customer Satisfaction Trends**:

   - **Analysis**: Analyzing the customer satisfaction (CSAT) score over time can reveal whether improvements or declines in service have occurred. EDA might uncover correlations between specific call reasons or times of day and low satisfaction scores, suggesting areas for improvement.

   - **Visualization**: A time series plot can show how CSAT scores have changed over time, highlighting periods of improvement or decline, which can be correlated with operational changes.

6. **Service Level Agreement (SLA) Compliance**:

   - **Analysis**: The dashboard shows SLA compliance (75.26%), but EDA can dig deeper to find specific reasons or times where SLAs are missed. This helps understand whether the problem is widespread or limited to specific call centers or types of calls.

   - **Visualization**: A scatter plot of response times vs. call reasons, color-coded by SLA compliance (e.g., within SLA, below SLA, above SLA), can provide insights into which issues or regions consistently miss SLAs.

Benefits of EDA:

- **Pattern Recognition**: EDA helps discover patterns such as peak call times or channels that generate higher customer dissatisfaction, allowing for proactive measures.

- **Outlier Detection**: Detecting anomalies or outliers, such as extremely long or short call durations, helps focus on areas needing further investigation.

- **Data-Driven Insights**: EDA provides initial insights that drive further analysis and decision-making, such as identifying high-impact areas for customer service improvement.

By using EDA and data cleaning techniques, RWFD Call Center can ensure that the data is ready for deeper analysis and actionable insights, leading to more effective resource allocation, improved customer satisfaction, and optimized call center performance.

Graphs (Univariate, Bivariate, Multivariate)

Graphs and visualizations are essential tools for analyzing data, enabling a better understanding of patterns, relationships, and distributions within the dataset. In this section, the focus is on the different types of graphical representations used to interpret the RWFD Call Center performance data. These are categorized into univariate, bivariate, and multivariate analyses, each providing insights at various levels of complexity.

Univariate Analysis:

Definition: Univariate analysis involves analyzing a single variable at a time. The goal is to understand the distribution, central tendency (mean, median), spread (variance, standard deviation), and outliers of the data.

1. **Distribution and Frequency Analysis**:

    o **Purpose**: This helps in understanding how data points are distributed across different values for a single variable. The aim is to detect common values, rare occurrences, and potential outliers.

    o **Example**: For the RWFD Call Center, a univariate analysis of the variable **call duration** can reveal the distribution of call lengths. It can help in identifying the most common call durations (e.g., 5 to 10 minutes) and detect outliers, such as very short or very long calls.

    o **Visualization Tools**:

        ▪ **Histogram**: A histogram of call duration shows the frequency of calls within different time intervals. For example, the graph might show that most calls last between 5 and 10 minutes, with fewer calls extending beyond 30 minutes.

        ▪ **Box Plot**: A box plot can be used to summarize call durations by showing the median, quartiles, and potential outliers. This gives a visual sense of how spread out the call durations are and whether there are any extreme values.

- **Customer Satisfaction (CSAT) Scores**: Analyzing the distribution of CSAT scores through a bar chart or frequency distribution table can show whether most customers rate their experience as positive, neutral, or negative. This could also reveal skewness in satisfaction trends (e.g., more neutral or negative feedback).

Bivariate Analysis:

Definition: Bivariate analysis examines the relationship between two variables, enabling the detection of correlations or associations between them.

1. **Correlation Analysis**:

   - **Purpose**: Correlation analysis helps to understand whether two variables move in relation to each other. Positive correlation means that as one variable increases, the other does too. Negative correlation means that as one variable increases, the other decreases.

   - **Example**: A bivariate analysis between **call duration** and **customer satisfaction** can reveal whether longer calls tend to result in higher or lower satisfaction scores. For instance, longer calls might correlate with lower satisfaction if they indicate unresolved or complex issues.

   - **Visualization Tools**:

      - **Scatter Plot**: A scatter plot can visually show the relationship between call duration and CSAT scores. Each point represents a single call, with its x-axis value as the duration and its y-axis value as the satisfaction score. The trend line can indicate the strength and direction of the relationship.

      - **Correlation Coefficient**: Numerical correlation coefficients (e.g., Pearson's correlation) can quantify the strength of the relationship between variables. For example, if the correlation between call duration and CSAT is -0.5, it suggests a moderate negative relationship, meaning longer calls might be linked to lower satisfaction.

2. **Cause and Effect Relationships**:

   - **Example**: Another bivariate analysis could involve **call reason** and **sentiment**. The analysis could show how different types of issues (e.g., billing questions, service outages) are linked to positive, neutral, or negative customer sentiment.

   - **Visualization Tools**:

      - **Bar Plot**: A bar plot can compare the average sentiment score for different call reasons. For instance, calls about service

outages might have a higher percentage of negative sentiments compared to billing inquiries.

- **Stacked Bar Chart**: This chart can be used to display the proportion of positive, neutral, and negative sentiments for each call reason, providing a clear picture of how sentiment varies by issue type.

Multivariate Analysis:

Definition: Multivariate analysis examines three or more variables simultaneously. This type of analysis provides deeper insights into the data's structure, helping identify complex relationships and interactions among variables.

1. **Multivariate Heatmaps**:

   o **Purpose**: Heatmaps provide a visual representation of the correlation between multiple variables at once, making it easy to identify patterns and relationships across a range of factors.

   o **Example**: In the RWFD Call Center dataset, a **heatmap** can be used to explore correlations between multiple variables, such as **call duration, customer satisfaction, sentiment, and time of day**. For example, the heatmap might show that longer calls during certain time periods correlate with lower customer satisfaction, and certain time windows are linked to more negative sentiment.

   o **Visualization Tools**:

       - **Correlation Heatmap**: A heatmap of correlation coefficients between variables, with colors representing the strength of correlation (e.g., darker shades for stronger correlations), can reveal whether multiple variables are interconnected. For instance, it might show that longer calls and negative sentiments are more common in the afternoon.

2. **Principal Component Analysis (PCA)**:

   o **Purpose**: PCA reduces the dimensionality of large datasets, enabling the identification of key factors that explain most of the variance in the data. This is particularly useful when dealing with many variables, as it simplifies the data while retaining important information.

   o **Example**: Applying PCA to the RWFD Call Center data could help identify the most influential factors contributing to **customer dissatisfaction**. For instance, it might reveal that call duration, call reason, and agent experience are the top three drivers of negative sentiment.

- **Visualization Tools**:
  - **PCA Biplot**: A PCA biplot can be used to show how the various variables (e.g., call duration, satisfaction, sentiment, etc.) contribute to the overall variance. This helps focus the analysis on the most important variables for further investigation.

3. **Multivariate Regression Models**:
   - **Purpose**: Regression analysis helps in understanding how multiple independent variables impact a dependent variable. For example, a multivariate regression could model how **call duration, time of day, and agent experience** impact **customer satisfaction**.
   - **Example**: In the RWFD Call Center, a multivariate regression model can predict customer satisfaction based on factors like call duration, time of day, call reason, and agent experience.
   - **Visualization Tools**:
     - **3D Scatter Plot**: A 3D scatter plot can visualize the relationship between three continuous variables, such as call duration, agent experience, and CSAT. It allows for an exploration of interactions between these variables and their collective impact on customer satisfaction.

4. **Cluster Analysis**:
   - **Purpose**: Cluster analysis groups similar data points together based on their characteristics. This can be useful for customer segmentation or identifying common patterns in call center performance.
   - **Example**: In the RWFD Call Center data, clustering could identify distinct groups of calls based on their characteristics (e.g., short-duration, high-satisfaction calls versus long-duration, low-satisfaction calls). This allows the call center to tailor strategies for different call types.
   - **Visualization Tools**:
     - **Dendrograms and Cluster Plots**: These visualizations help display the results of clustering, showing the grouping of similar calls based on factors like duration, reason, and customer satisfaction.

Benefits of Graphical Analysis:

- **Univariate Analysis**: Provides insights into the distribution and structure of individual variables, helping detect skewness, outliers, and common trends.

- **Bivariate Analysis**: Helps uncover relationships between two variables, identifying correlations and cause-effect relationships that drive business outcomes.

- **Multivariate Analysis**: Allows for more complex insights by examining interactions between multiple variables, enabling more comprehensive and accurate decision-making.

By leveraging univariate, bivariate, and multivariate visualizations, RWFD Call Center can better understand customer behavior, call performance, and operational efficiency, leading to improved service strategies and resource allocation.

Dashboard

A well-designed dashboard is crucial for making data-driven decisions quickly and effectively. Dashboards consolidate various data points into a single, easy-to-understand visual interface that enables decision-makers to identify trends, track progress, and measure performance. For the RWFD Call Center performance report, the dashboard integrates critical metrics that provide a holistic view of the call center's operations, allowing for both real-time monitoring and long-term performance assessment.

Dashboard Design and Insights:

1. **Purpose of the Dashboard**:

   o The RWFD Call Center dashboard is designed to offer an intuitive interface where managers and stakeholders can view key metrics related to call center performance at a glance. It allows for quick, informed decisions based on up-to-date data, improving the overall efficiency of the call center.

   o The dashboard's main goal is to provide real-time insights into operational metrics like customer satisfaction, call volume, and agent performance, highlighting areas where improvements can be made.

2. **Key Design Elements**:

   o **Clear Layout**: The design of the dashboard is user-centric, featuring clear sections that divide various types of data (e.g., agent performance, call statistics, customer feedback). This enables users to focus on specific areas without feeling overwhelmed.

   o **Data Visualizations**: Different types of charts (e.g., bar graphs, pie charts, line graphs, scatter plots) are used to represent various metrics in a visually appealing and easily interpretable way.

- **Interactive Filters**: Users can interact with the dashboard through filters like time periods (daily, weekly, monthly), call types (inbound, outbound), and customer segments. This allows for tailored analysis depending on the specific focus of the user, such as analyzing data for a particular department or time of day.

- **Color Coding**: Performance trends (positive and negative) are highlighted through color-coded visualizations. For example, green might represent high customer satisfaction, while red indicates a dip in service quality, making it easier to spot areas needing attention.

3. **Insights from the Dashboard**:

- **Customer Satisfaction (CSAT) Scores**: One of the central insights provided by the dashboard is the **average CSAT score** for each period. Managers can monitor whether overall customer sentiment is improving or declining. For example, a dip in CSAT scores could signal recurring issues with agent performance or call handling times.

- **Agent Performance**: The dashboard breaks down metrics for each agent, such as **calls handled**, **average call duration**, and **customer feedback**. This allows supervisors to identify top-performing agents and those who may need additional training. A heatmap or bar chart might be used to compare agent performance metrics.

- **Call Volume and Traffic Patterns**: The **call volume** section of the dashboard tracks how many calls are handled per hour, day, or week. This metric is essential for workforce planning and ensuring that adequate resources are allocated during peak call times. A line graph showing call traffic patterns across the day or week can reveal high-traffic periods that require more staffing or better automation.

- **Call Resolution Time**: Another critical insight is the **average call resolution time**—the amount of time it takes for an agent to resolve a customer's issue. A consistently high resolution time might indicate that agents need better training or more resources, whereas shorter times generally correlate with increased customer satisfaction.

- **First Call Resolution (FCR)**: The percentage of calls that are resolved on the first attempt (without the need for follow-up) is a key performance indicator (KPI). The dashboard highlights this metric through a gauge chart or pie chart. Higher FCR rates are generally associated with more efficient call handling and improved customer satisfaction.

- **Sentiment Analysis**: Customer sentiment data (e.g., positive, neutral, negative) from call transcripts or surveys is displayed on the

dashboard. A word cloud or bar graph might show which keywords are most frequently associated with positive or negative sentiment, providing actionable insights into what drives customer dissatisfaction or satisfaction.

- **Service-Level Agreement (SLA) Compliance**: The dashboard tracks whether the call center is meeting its predefined **SLA targets**, such as answering 80% of calls within 30 seconds. Compliance with SLAs is critical to maintaining operational efficiency and customer satisfaction.

- **Abandonment Rates**: The **call abandonment rate**, or the percentage of customers who hang up before their call is answered, is another crucial KPI. If this rate is high, it might indicate a need for better call distribution or reduced wait times.

Key Performance Indicators (KPIs) and Metrics Highlighted:

1. **Call Center Efficiency**:

   - **Average Handle Time (AHT)**: The time taken to handle each call from start to finish. A lower AHT indicates that calls are being resolved quickly, while a higher AHT may suggest inefficiencies in the call process.

   - **Average Speed of Answer (ASA)**: The time it takes for an agent to answer a call after it's been routed to them. A low ASA indicates better performance, as customers don't have to wait too long.

   - **Service Level**: The percentage of calls answered within a specified time frame (e.g., 80% of calls answered in 30 seconds). This metric is often tracked through SLA agreements and is vital for maintaining high service standards.

2. **Customer Experience Metrics**:

   - **First Call Resolution (FCR)**: The percentage of customer inquiries or issues resolved on the first call. High FCR rates are often associated with greater customer satisfaction and lower operational costs since fewer repeat calls are needed.

   - **Customer Satisfaction (CSAT)**: A direct measure of customer happiness, usually gathered through post-call surveys or feedback mechanisms. This metric is crucial for identifying pain points in the customer journey and ensuring the call center meets customer expectations.

   - **Net Promoter Score (NPS)**: A loyalty metric that gauges how likely customers are to recommend the service to others. It provides insights into overall customer sentiment and long-term customer relationships.

3. **Call Volume Metrics**:

   o **Total Calls Handled**: The total number of calls managed by the call center over a specific period. This metric helps in analyzing workload and resource allocation.

   o **Abandonment Rate**: The percentage of calls where customers hang up before speaking to an agent. A high abandonment rate may indicate long wait times or ineffective call routing strategies.

4. **Agent Performance Metrics**:

   o **Occupancy Rate**: The percentage of time that agents are actively handling calls versus being idle. A balanced occupancy rate ensures agents are neither overworked nor underutilized.

   o **Agent Utilization**: This metric measures how effectively agents are being used relative to their total available work hours. A higher utilization rate means that agents are handling a large portion of their available calls, improving productivity.

   o **Agent Satisfaction Scores**: This can be measured through surveys or self-reported feedback, giving insight into how happy agents are with their work environment and resources.

The RWFD Call Center dashboard is an essential tool for tracking both operational efficiency and customer satisfaction. By monitoring KPIs like CSAT, FCR, AHT, and call volume, managers can identify trends and areas for improvement. The dashboard provides real-time visibility into how the call center is performing, ensuring that service levels are maintained and customer issues are resolved promptly and efficiently. Its ability to provide tailored insights based on filters makes it versatile and capable of supporting both short-term tactical decisions and long-term strategic planning.

8. Storytelling (Business Impact)

In this section, the aim is to transform the insights derived from the data and dashboard into a narrative that clearly communicates the business impact, aligning with the organization's objectives. Storytelling with data provides stakeholders with a clear understanding of how the findings affect business performance and what actions need to be taken to drive improvements.

Key Findings and Their Implications:

1. **Customer Satisfaction Decline and Root Causes**:

   o **Finding**: Based on the dashboard, there has been a noticeable dip in **Customer Satisfaction (CSAT)** scores over the last quarter, particularly during peak hours when call volumes are high. The **First**

Call Resolution (FCR) rate has also dropped, indicating that more customers are requiring multiple interactions to resolve their issues.

- o **Implications**: Declining CSAT and FCR scores suggest that customers are not receiving the quality of service they expect. This could lead to increased churn rates and negative word of mouth, potentially impacting the company's reputation and customer retention efforts. If not addressed, this dissatisfaction could reduce repeat customers, harming long-term profitability.

2. **Increased Call Abandonment Rates**:

- o **Finding**: The **call abandonment rate** is higher than industry benchmarks, especially during specific times of the day when call volumes spike. Customers are abandoning calls after waiting in the queue for extended periods.

- o **Implications**: High abandonment rates mean the call center is not effectively managing customer expectations or workloads. Long wait times frustrate customers, leading to lost business opportunities and lower customer loyalty. This is particularly concerning because customers may turn to competitors for faster service, resulting in revenue loss.

3. **Agent Performance Disparities**:

- o **Finding**: The dashboard highlights performance disparities among agents, with some consistently handling calls more efficiently and achieving higher customer satisfaction than others. Certain agents have significantly higher **Average Handle Times (AHT)** and lower **CSAT** scores.

- o **Implications**: Inconsistent agent performance affects overall service quality. Agents with lower performance are not meeting customer expectations, increasing the workload on higher-performing agents and possibly leading to burnout. Additionally, customers serviced by lower-performing agents are more likely to have negative experiences, further impacting customer satisfaction.

4. **Workforce Management Issues**:

- o **Finding**: There is an evident mismatch between staffing levels and call volume patterns. Peak times have insufficient agents to handle the increased call traffic, while during off-peak periods, agents are underutilized.

- o **Implications**: Poor workforce management directly affects both operational costs and service quality. Understaffing during peak times

leads to long wait times and increased abandonment rates, while overstaffing during quieter periods results in unnecessary labor costs. This inefficiency can strain the company's budget and reduce overall profitability.

Recommendations and Action Plans for Stakeholders:

1. **Improve Call Center Efficiency**:

   o **Action Plan**: Optimize staffing levels based on historical call traffic patterns. Implement a dynamic workforce management system that adjusts agent schedules in real-time, ensuring the call center is fully staffed during peak hours and leaner during off-peak periods.

   o **Expected Impact**: Better matching of staffing levels to demand will reduce customer wait times and abandonment rates, improving overall customer satisfaction. This change will also reduce labor costs during periods of low demand, increasing operational efficiency.

2. **Enhance Agent Training and Support**:

   o **Action Plan**: Implement targeted training programs for underperforming agents, focusing on areas such as call handling, problem-solving, and communication skills. Pair lower-performing agents with high performers for mentoring, and introduce real-time feedback mechanisms to help agents improve quickly.

   o **Expected Impact**: Improving agent performance will lead to more consistent service quality across the call center, boosting CSAT scores and FCR rates. Customers will experience fewer issues, reducing the need for repeat calls and increasing overall satisfaction.

3. **Reduce Call Abandonment Rates**:

   o **Action Plan**: Invest in automated solutions such as **Interactive Voice Response (IVR)** systems or chatbots to handle simple inquiries, thus reducing the load on human agents. Additionally, introduce a call-back option for customers who do not want to wait in the queue.

   o **Expected Impact**: These initiatives will reduce the call abandonment rate by allowing customers to either solve their issues through self-service or receive a call back at a more convenient time. As a result, customer frustration will decrease, leading to higher retention and satisfaction.

4. **Monitor and Improve FCR and CSAT Scores**:

   o **Action Plan**: Regularly monitor **First Call Resolution (FCR)** and **Customer Satisfaction (CSAT)** metrics using the dashboard.

Introduce incentive programs for agents who achieve high FCR and CSAT scores, and create improvement plans for agents falling behind.

- o **Expected Impact**: A focus on improving FCR will ensure that more customer issues are resolved on the first contact, leading to higher CSAT scores. Incentivizing agents will motivate them to consistently deliver high-quality service, further boosting customer satisfaction and loyalty.

5. **Incorporate Customer Feedback into Operations**:

- o **Action Plan**: Actively analyze customer feedback from call transcripts and surveys to identify recurring pain points. Develop a customer experience team to focus on resolving these issues and implementing solutions that directly address customer concerns.

- o **Expected Impact**: Proactively addressing customer feedback will reduce negative experiences and increase customer satisfaction. It will also allow the call center to adapt to evolving customer needs, improving its long-term reputation and reducing churn rates.

6. **Leverage Technology for Performance Monitoring**:

- o **Action Plan**: Use advanced analytics tools to track agent performance in real-time, identifying patterns and areas for improvement. Implement AI-driven solutions to predict future call volumes and optimize staffing needs accordingly.

- o **Expected Impact**: Real-time performance monitoring will allow for more proactive interventions when agents struggle, preventing potential customer dissatisfaction. AI-driven solutions will improve forecasting accuracy, ensuring the call center remains agile and well-prepared for fluctuating demand.

By transforming raw data into actionable insights, this section presents the narrative of how the RWFD Call Center can optimize its operations to improve customer satisfaction and service efficiency. The key findings from the dashboard—such as declines in customer satisfaction, high call abandonment rates, and workforce management inefficiencies—offer clear opportunities for improvement. The recommended action plans provide a roadmap for addressing these issues, ensuring that the call center remains competitive, customer-focused, and cost-efficient.

Through effective storytelling, stakeholders can see the tangible business impact of these recommendations, enabling them to make informed decisions that enhance both short-term performance and long-term sustainability.