## **Detailed Plan for Using the Customer Short List for Analytics Update**

### **1. Track When You Last Updated Analytics**

Keep a record of the last time you ran the analytics update job (for example, yesterday at 2am).

### **2. Identify Relevant Customers**

**A. Customers with CRM Changes:**

Review the CRM system for customers whose information (name, age, location, etc.) was changed or updated after your last analytics job.

**B. Customers with New Transactions:**

Check transaction logs for customers who had new interactions (calls, chats, etc.) after the last run.

### **3. Build the Short List**

Combine the list of customers from CRM changes and the list from new transactions.

Make sure each customer appears only once in this combined list (remove duplicates).

### **4. For Each Customer in the Short List:**

#### **a) Get the Latest Customer Profile**

Fetch the most recent customer details from CRM (in case of any profile updates).

#### **b) Get Transaction Data**

Gather all the customer’s new transactions since the last run (or, if needed for accurate metrics, fetch all their transactions for a specific period like the current month).

#### **c) Calculate Metrics**

**AHT (Average Handle Time):**

If you keep running totals, add up the new durations and update the total and count; otherwise, recalculate from scratch for the period you care about.

**FCR (First Call Resolution):**

Determine, among their new issues, which were resolved in the first interaction without repeats.

**Escalation Rate:**

Count how many of the new interactions needed to be escalated to a supervisor or higher tier.

#### **d) Update Analytics Table**

Write (insert or update) the analytics data for this customer into your Analytics Table.

#### **e) Log Results (Optional but Recommended)**

Keep track of which customers were processed, whether updates were successful, and any errors encountered (this is helpful for audits and troubleshooting).

### **5. After All Customers Are Processed**

Update your “last run time” marker to the time this job finished.

This ensures next time, you only pick up new or changed data.

### **6. (Optional Enhancements for Large Scale)**

**Parallel Processing:**

If your short list is large, you can split the list and process customers in parallel (using multiple threads or machines).

**Error Handling:**

If there’s a failure on one customer, record it but allow the rest to continue.

**Monitoring and Alerts:**

Set up alerts if the job fails or takes too long.

### **Summary Table of Steps**

|  |  |  |
| --- | --- | --- |
| **Step** | **What You Do** | **Why** |
| 1 | Track last update time | For incremental processing |
| 2 | Find changed customers (CRM + transactions) | To target only customers with changes |
| 3 | Build unique short list | Avoid double work |
| 4 | For each customer: get data, calculate, update | Perform focused analytics update |
| 5 | Update last run time | Prep for next cycle |
| 6 | (Optional) parallel, monitor, error-handle | Robustness and scalability |

**This plan ensures you always work only on customers with actual new activity or changes, making your analytics scalable and up-to-date without unnecessary workload.**