Black text: Stakeholder; Green text: Krish; Purple text: Fai

I. Questions about the Legal Issues Menu Summary Reports and CARs

Fai's Questions:

1. In Legal Issues Menu Summary Reports, Does N/A just mean that the client didn't select any of the menu options? If this is the case, is it correct to assume that the process is the same as "All Other Issues"? What is the difference between N/A and keeping the same category name, for instance
2. Are we missing a csv for the Intake section? Having just descriptions for Intake Reports won't be enough to be able to answer questions
3. In All Calls by Month, what do CorrelationID, Inbound & Outbound Trunk, etc. mean
4. Cannot open November 2024 folder in All Calls by Month

- Are there points in the menu where people seem confused, e.g., they go back and forth a lot between options
- In general, what is the usage rate of various options on the menu – what is high usage, low/no usage. —
    - calculate the count of Total Calls of each sub and overarching legal menu options — can create a barchart/pie chart, which could probably help with establish what is high vs low usage;
- Connection between abandonment rate and closed queue message, as well as any other points at which abandonment happens —
    - calculate the correlation between abandonment rates (Abandoned Call) and closed queue messages (Closed Queue Calls) OR
    - check count of Closed Menu in Contact Session ID groups w/o Agent Name (ie: Agent Name is N/A)
    - need to confirm whether Closed Menu in CAR == Closed Queue Calls in summary report, and whether Abandoned Call == N/A for Agent Name for all

  Potential definitions:

  • **Abandonment rate** = people who wait but hang up.
  • **Closed queue message** = people who are told right away that no one is available.
  Source: GenAI
- Connection between closed queue and clinics voicemail – how often are people choosing clinics when queue is closed
    - Compute the # of clinics voicemail in proportion to the total closed queue calls — can also see how that varies across categories

- Trends in call volume – times of day/days of week
    - Use the Activity Start column in CARs — this is different from the Legal Summary Report though??
- Can you figure out how callers are getting to the front desk when they are not given that as a menu option
    - Clarification: what indicates that it has gotten to the front desk? Is it if Agent != NA in CARs?
- Reduce number of selections callers must make to reach their endpoint without losing triage function or our ability to identify legal issues and sub-issues (although we are open to consolidating some sub-issues
    - Might be worth asking about how the roles in the consultation are given — if the same person can address a wide range of issues, could re-categorize based on that rather than reducing to specific categories
    - **Triage** is your process for figuring out what the legal issue is, how urgent it is, and who should handle it.

      So the goal is: simplify the menu **without losing the ability to route callers correctly** or assess their needs.

  Source: GenAI

- This is the other angle from the "total calls" reports to determine whether callers to our special intake lines are calling directly or being transferred via the menu. Examples: HIV line, Veterans, Criminal Records, Clinics
    - Don't understand what this point means
- Can we get a data visualization to understand numbers and types of calls and what happens to them? Ideally we would be able to compare historical data with future data to see if we are improving (will need metrics to determine what we mean by improvement)
    - % calls that get callbacks, % calls that are answered live, % calls that get closed queue message, % calls going to voicemail(s) transfer
    - Difference in service rates for suburban seniors vs. "regular"

      Do we have "rates" data? Maybe the number of instances there is an Agent name in CARs?
- What other suggestions do you have for what we should be asking about this data and what changes we should be looking to make?

II. Questions about the external intake lines (see Intake Phone Numbers for

Reporting spreadsheet)

What do we want to know?

- Call volumes for each of the intake lines
  - Calculate frequency of each number in All Calls data? – which column is used to refer to the corresponding intake line in All Calls or CARs (cannot seem to find an the Name in the other datasets (unless there's a missing Intake spreadsheet entirely)
- For numbers that have an internal transfer option, how many calls come in directly and how many come in via internal transfer (also percentages)
  - Same question as above – if this is resolved then shouldn't be an issue
  - Does X mean it has or doesn't have (since it's either X or blank in Internal Transfer Option)
- Times of day and days of week trends (e.g., are we getting a lot of after hours messages on these voicemail lines)
  - Similar to earlier — ask if it's separated bc they want with CARS vs All Calls

Why do we want to know?

- Are these numbers getting sufficient call volume to justify continuation? • Are people getting to these lines from external outreach/publicity or through our own phone menu options? – do we have the outreach tag?
- Are callers getting through (to voicemail) outside of normal business hours?
  - Determine the working hours and filter out the ones that are outside of working hours and count the instances of any voicemail lines (ie: Voicemail in UserType of All Calls)

III. Questions about All Calls Reports

These reports show every incoming and outgoing phone call for our entire agency. It's a "data dump" that is unusable for us in its current state, without data analysis and a way to pull helpful information from the clutter.

- Is there any insight we can gain from the data, such as peak call times, repeat callers, calls outside of business hours, call duration?
  - Determine the most frequent time ranges (Start time and Answer time) in All Calls and can create a visualization accordingly

- Can we create a report that eliminates all the extraneous information and focuses on incoming calls to the main number and to the various intake lines, excludes outbound calls and inbound calls to specific staff, consolidates the many steps for each caller into 1 call, and puts information into a visually friendly format. Can this be done in a way that works automatically in the future so we will have usable monthly reports?
    - Can create a python script that filters irrelevant columns for specific stakeholders, so that when they receive the report they just have to run it through the script. Alternatively, when the data is being stored, can create a new fct for different stakeholders that only collects relevant information for those users
- Other ideas?

Data summary report – missing values

Can we map calls between the call journey dataset and the call summary data?

Presentation for Wednesday (extra credit!) – would like to see on Tuesday if you are presenting

When presenting to Cynthia, I should have your presentation & code on Friday to check, particularly in the beginning of the course