

Stakeholder Requirements Document:

Customer Service & Operations Analytics Framework

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Client/Sponsor: Director of Operations, Operations & Customer Experience Leadership Team

Business problem: The organization lacks a centralized, analytics-driven view of customer service performance and operational efficiency. Decision-makers currently rely on fragmented reports, delayed metrics, and isolated KPIs, making it difficult to:

- Identify service bottlenecks
- Track performance trends over time
- Prioritize operational improvements
- Make data-backed decisions at an executive level

Primary Question: How can customer service and operations performance be monitored continuously to enable faster, data-driven decisions?

Stakeholders:

Stakeholder	Role	Interest
Operations Manager	Director of Operations	Optimize service delivery and operational efficiency
Customer Support Lead	Head of Customer Experience	Improve customer satisfaction and resolution times
Business Analysts	BI / Analytics Team	Monitor KPIs, validate data quality
Executive Leadership	VP / Leadership Team	High-level performance tracking and strategic decisions

Stakeholder usage details: Stakeholders will use the BI solution to:

- Monitor key customer service KPIs (response time, resolution time, volume)
- Identify trends and anomalies in service performance
- Compare performance across regions, teams, or time periods
- Support operational planning and resource allocation

- Enable executive reviews with concise, visual summaries

The dashboard is expected to support:

- Daily monitoring for operations teams
- Weekly/monthly reviews for leadership
- Long-term trend analysis for strategic planning

Primary requirements: To be considered successful, the BI solution must:

- Provide a single source of truth for customer service and operations data
- Translate raw data into clearly defined KPIs
- Support interactive filtering and drill-downs
- Be accessible to both technical and non-technical users
- Deliver executive-ready visualizations
- Be scalable for long-term monitoring and future data expansion
- Ensure data accuracy, consistency, and reliability

Success Metrics: The project is considered successful when:

- Stakeholders can answer business questions without ad-hoc reports
- Decision-making time is reduced through readily available insights
- Performance trends and risks are visible early
- Leadership trusts and regularly uses the dashboard for reviews

Deliverables:

- Strategies Document
- Project Requirement Document(if needed)
- KPI Definitions & Metrics Framework
- Dashboard Mockups
- Analytical Data Model
- Executive Dashboard
- Final Executive Summary