**Final Project – Data Analysis Course – HUJI x WIX**

My major KPI’s are CSAT, NPS, and Offers, which will be measured at a ratio of 40/40/20 respectively. Ratio can change, depending on company policy, but I based this ratio on the notion that CSAT and NPS are relevant to the entire workforce, and are simpler scales than the offers. Offers KPI gets only the 20 part in the ratio, because it is relevant only to agents in the Phone or Chat channels, which are the smaller channels of the three, Email being the majority. Giving Offers a bigger part in the bonus model will neglect the majority of Email channel of service. Furthermore, lending the Offers KPI a considerable part in the bonus model acts as an incentive for agents to give additional offers (if it’s for them to decide), and use the channels which include the option to give an offer.

This bonus model will be divided into months and agents will be measured separately by their type and channel. **General CC agents are the majority, while Email comm channel is the most frequent.** However, when looking at the offers as a KPI, it is important to notice that there are no offers made by Email, meaning (in our case), that offers are only made by Chat or Phone.

I will also include a minimum threshold for the scores and offers, as a point from which agents can be considered for a bonus. This threshold will be based on an average of a count of interactions, scores, or offers per month.

1. **CSAT** – Calculated by dividing the number of 4-5 responses in the total number of responses per agent, then, multiply by 100 to get CSAT score as a percentage.
2. **NPS** – Calculated by subtracting the division of the number of Detractors (0-6 resp.) in total number of responses, from the division of the number of Promoters (9-10 resp.). This subtraction results in a percentage, which is the NPS score. There are also a group of Passives (7-8 resp.), which is not part of the calculation of the final score. Additionally, I’ve only included agents who received an “nps\_reason” (meaning, it’s not blank/null), based on the notion that those who received both numerical score and a written response fared better in general.
3. **Offers** – I’ve built a “Tree of Offers” which simplifies the process. To calculate an “Offer Score”, I’ve come up with a similar method for calculating the NPS score. I will collect success rate (offer implemented) and failure rate (no suggestion/offer declined or no implemented) relative to the total count of offer\_exist per agent. I will then calculate the Offer Score by subtracting the failure rate from the success rate. This method will not only add “points” to an agent, but also subtract points, which shall encourage an agent to make suggestions when offers exist. I’m not yet solid on the Offers calculation/grading model, it might neglect those with a lower count of offer\_exist due to its final translation into a percentage. **I can address this bias by setting a threshold of work\_period or interaction count, which will determine an agent’s entitlement to receive a bonus. Deciding the right threshold might be an average of work\_period or interaction count between agents of the same type.**
4. **Final Score** –
5. **Agent Types –** Based on a calculation of the relative frequencies of each “department” in the DB, I’ve found that General CC agents are the vast majority. To grant the bonus evenly between the departments, I’ve calculated the top 10% from each department, according to its relative size in the entire workforce.
6. **Languages** – Apart from General CC and Marketing agents, all agents serve customers in English only. Therefore, differentiating between service languages is relevant only when measuring General CC and Marketing agents.

**Possible KPI’s**

* The basic ones would be CSAT and NPS, the first is better for understanding the short-term picture and the latter for the long-term.
* Other KPIs can be set based on agents’ offers, and a general amount of offers which entitle a bonus. It’s worth mentioning that maybe some types of agents are not even giving offers, that’s just not their role, so they’re not supposed to be included in the KPI.
* **Based on the data, it seems that different kinds of agents should be measured differently, e.g. General CC agents probably handle more interactions and come into contact with a larger number of customers. Therefore, CSAT & NPS should be measured compared to agents of the same type and not to others.**