Document for additional questions for the case study.

Gabriel Sant Anna de Franca, 14/11/2025

EXECUTIVE SUMMARY:

- Gain more clarity on Support team objectives and strategy, channel definitions, and agent details in order to improve data relevance, quality, proactive analysis, and more assertive data recommendations.
- Recommendations aim to improve efficiency, optimize channel, agent, and BPO performance, and reinforce a data-driven culture.
- Channel strategy focused on a self-service and digital-first approach, enabling customers to resolve simple issues on their own.
- Given the high cost of call resolutions, digital channels should be strengthened as the primary entry point for customers.
- Introduce a Performance Management Framework to ensure all operational teams remain aligned, with clear ownership, communication, and focus on the KPIs that drive the business.
    - Quarterly Planning and OKRs
    - Monthly Business Review
    - Weekly Operational Updates (by Skill / Language)

Based on the data provided, what questions would you ask the Support teams to clarify their strategy?

I would group the questions into three core areas: objectives and strategy, channel definition, and agent/BPO operations. The goal is to understand what drives planning and decision-making when teams organize themselves to resolve issues. Given the differences in resolution rates across BPOs and channels, I want to identify where strategic choices influence performance and use that to surface best practices.
Overall, these questions aim to improve data relevance, quality, proactive analysis, and more assertive data recommendations.

- **Objectives and strategy**
  Understanding goals, performance measurement, key KPIs, and data gaps will guide the data strategy and help prioritize relevant dashboards and metrics.
  - How do you measure performance? Which KPIs drive your decisions?
  - What are the primary goals for Support: cost optimization, merchant satisfaction, resolution rate, or a balanced scorecard?
  - Which processes exist to identify root causes and reduce recurring contacts?
  - Do you have the necessary data to act and make decisions? Are there known data gaps or glitches that affect decision-making?

- **Channel definition**
  A clear view of channel routing, costs, and business logic helps improve data interpretation, the quality of insights, and the accuracy of recommendations.
  - How are channel routes and the multi-channel strategy defined?
  - Which intents are expected to be handled by each channel?
  - Are there routing rules that redirect specific reasons or merchant segments to certain channels or agents?
  - Do you actively steer merchants toward a preferred channel?
  - Are there channel-specific contracts with different cost structures?
  - Are there channel constraints that force multiple touches for certain cases?

- **Agent and BPO operations:**
  Understanding operational nuances across internal teams and BPOs enables deeper analysis, more proactive recommendations, and more accurate evaluation of performance metrics.
  - What work is performed by BPOs versus in-house teams?
  - Are agents authorized and/or skilled to resolve the issues they receive?

- Are agents multi-skilled, multilingual, or specialized by channel?
- How do you decide which BPO and/or agent should handle a customer inquiry?
- How is BPO performance monitored and incentivized?
- Is the cost the same across agents and BPOs?
- What is the agent turnover rate, and how long does initial training last?

What recommendations would you make to improve the performance of the overall engine?

My recommendations focus on improving efficiency, optimizing channel and agent performance, and strengthening a data-driven culture.

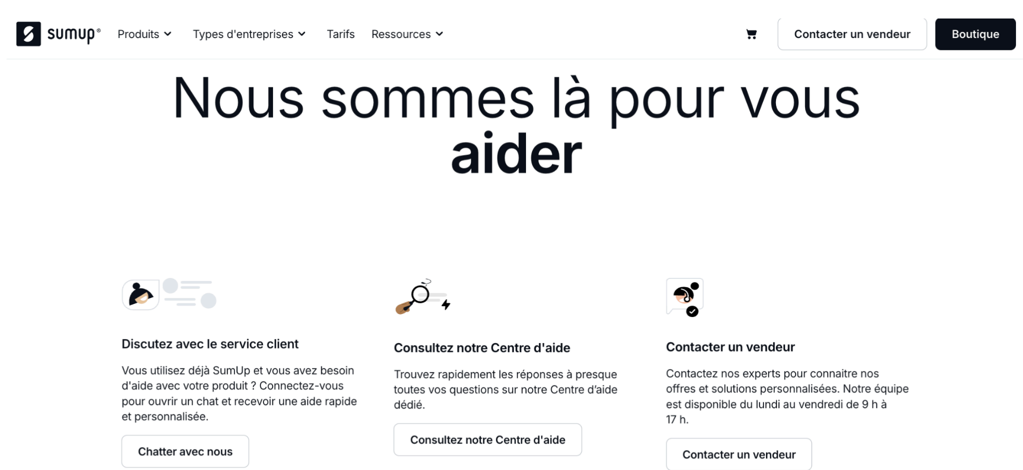
- **Improve efficiency**
  - Route inquiries based on channel resolution efficiency and cost.
  - Maintain constant feedback loops with Product and Operations to address the root causes of recurring issues.
  - Reduce multi-touch cases and shorten resolution windows.
  - Empower agents to resolve inquiries at the first touchpoint.
- **Optimize channel, agent, and BPO performance**
  - Improve quality and consistency across agents.
  - Establish clear decision-making authority levels.
  - Introduce calibration sessions between in-house teams and BPOs.
  - Define rules and prioritization for high-value merchants.
  - Invest in a comprehensive online Q&A / knowledge base to support self-service.
- **Create a data-driven culture:**
  - Use predictive analysis to act before the customer reaches Support.
  - Ensure high-quality data and well-defined KPIs for reliable decision-making.
  - Conduct structured business performance reviews.
  - Drive proactive data analysis and recommendations.
  - Develop an attribution model for multi-channel and multi-touchpoint interactions.

Based on the costs computed, what would you recommend to be the 2024 channel strategy, and where should Support teams invest more?

I recommend a channel strategy centered on a self-service and digital-first approach. Customers should be able to resolve simple issues independently. Given the high cost of call resolutions, digital channels should be reinforced as the primary entry point for customers.

Overall guideline:

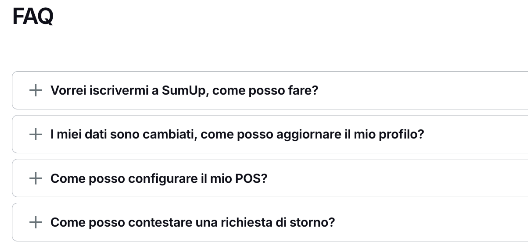
1. Invest in creating a comprehensive and reliable online Q&A / knowledge base to support self-service.
    - Ensure an intuitive structure:
        - Clear separation between new and existing customers.
        - The current entry page is not straightforward, customers may not know where to start.



    - Provide an efficient Search option to help customers quickly find issues and solutions within the Q&A page.
    - Create a Top 5 Questions section focused on high-volume issues that can be resolved through self-service.
    - Run A/B tests on different page designs to evaluate whether current FAQ topics and themes effectively reduce inquiries for issues customers can solve themselves.
        - Test country-level personalization to assess whether a localized FAQ improves resolution efficiency.

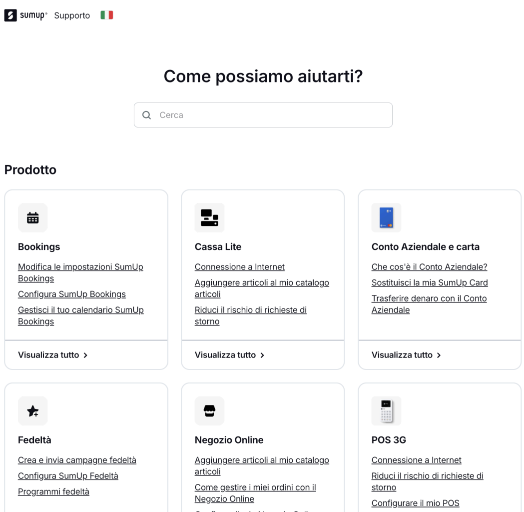
Comparison 1: FAQ top question list

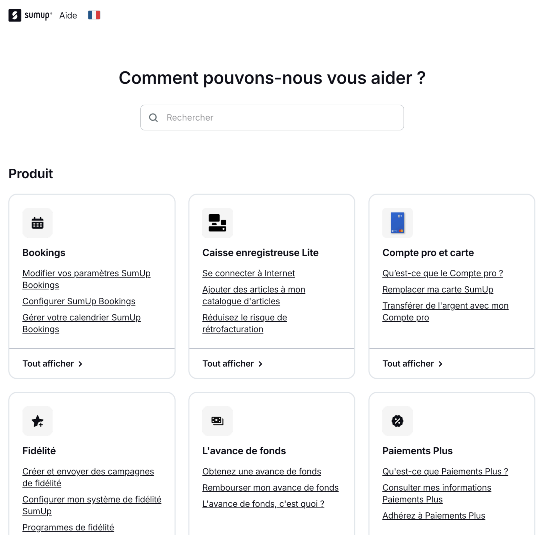
VS



(images above: France and Italy FAQ pages have the same topic order)

Comparison 2: Support pages





(images above: France and Italy Support pages have topics organized alphabetically)

2. Make chat the default entry channel for most non-urgent topics, given its higher resolution rate.
   - Use bots to triage and resolve straightforward issues.
   - Strengthen first-contact resolution to prevent repeat touchpoints.

3. Use phone support strategically. Reserve this channel for urgent, high-impact merchants and issues.
   - Outages and device problems
   - Urgent payment interruptions
   - Business-critical situations
   - High-value merchants

4. Use email/tickets for non-urgent, evidence-based cases.
    - Ideal for topics that require document or proof submission.
    - Invest in structured templates with clear steps for issue resolution.

5. Optimize support team efficiency.
    - Route inquiries according to team performance and availability.
    - Ensure customer distribution accounts for workload, skill sets, and channel experience.

Outline a conceptual performance management framework (we plan in quarterly cycles) that aims to ensure alignment between our operational teams, split by skills and language. Describe the ceremonies you would put in place, including the roles and responsibilities of yourself and other relevant teams and stakeholders.

The goal of this framework is to establish a process that keeps all operational teams aligned while ensuring clear ownership, communication, and focus on the KPIs that drive the business.

1. Quarterly Planning and OKRs
Objective: align on strategic topics: capacity, roadmap, and goals for the upcoming quarter across Support, Product, Data, and Engineering.
Description: Before each quarter, review historical volumes and known changes, define team capacity (BAU, long-term projects, deep dives, ad hoc), and agree on North Star KPIs with a simple driver tree by skill and language. Set quarterly OKRs.
My role: Prepare the Analytics roadmap, and propose, track, and measure the North Star KPIs
Participants: Director of Support, Regional Support Leads, Product, Data, and Engineering leads.

2. Monthly Business Review
Objective: Ensure we remain on track and quickly realign priorities when needed.
Description: Review performance by skill and language: volumes, North Star KPIs, OKR progress, and actuals vs. target. Confirm the monthly business plan: what initiatives continues, what pauses, and where capacity needs to shift.
My role: Own the MBR dashboard, propose actions based on data, and highlight risks and trade-offs.
Participants: Regional Support Leads, Skill Leads, Language Leads, BPO Managers, Product, and Data.

3. Weekly Operational updates (by Skill and Language)
Objective: Translate the framework into weekly execution and ensure local teams act on insights.
Description: Each week, Skill and Language Leads run short huddles with their teams. Review a scorecard with key day-to-day metrics and agree on concrete actions based on the indicators.
My role: Ensure the scorecard is up to date, provide standard views by skill and language, suggest focus areas, and track progress.
Participants: Skill Leads, Language Leads, and BPOs Leads. Additional stakeholders as needed.