Stakeholder Notes

Project Title: Call Center Performance Dashboard
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Prepared For: Call Center Operations and Quality Assurance Team
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Background

The call center has recently experienced an increase in complaints regarding long hold times, inconsistent agent experiences, and unclear performance expectations. Supervisors report difficulty identifying trends in agent behavior due to a lack of centralized performance data.

This dashboard initiative was proposed to provide better visibility into agent performance indicators and support data-driven decisions for coaching and staffing improvements.

Key Stakeholder Goals

1. Improve First Call Resolution (FCR) by at least 15 percent within the next 90 days.
2. Reduce repeat call volume by identifying root causes and implementing targeted training.
3. Monitor the impact of coaching sessions on agent performance using data.
4. Align staffing and scheduling based on performance insights to improve outcomes.
5. Enhance Customer Satisfaction (CSAT) scores through strategic performance improvements.

Dashboard Insights Needed

- Call volume by agent and shift
- Average handling time trends
- CSAT score breakdown by agent
- Repeat call rate by issue type
- Coaching history and performance before and after coaching

Pain Points Identified

- Lack of centralized performance tracking for agents and teams
- Difficulty measuring effectiveness of coaching and training
- Inconsistent data across multiple Excel logs and coaching sheets
- Limited insight into the root causes of repeat calls

Timeline and Expectations

- Initial mock dashboard completed for testing and feedback
- Internal review to gather stakeholder feedback
- Final dashboard (Phase 1) to be published with weekly data updates
- Future enhancements (Phase 2) to include real-time data integration and alerts