CUSTOMER SUPPORT Analitycs - DASHBOARD

Internal TOOL for a FinTech Company

A clean, simple and intuitive dashboard created to assist the Customer Support Department of a FinTech Company.

Based 100% on Google Sheets functionalities.

Includes instructions and guidelines for easy operability by non-analytics employees.

- **Stakeholders:** Customer Support Department, Marketing Department, Sales Department, Leadership.
- **Main purpose:** To support non-analytics employees with specific monthly reports.
- **What it consist of?** Metrics and Analytics based on data exported from the internal CRM (Customer Relationship Managemen)t tool.
- **Why is it being built?** To offer a quick snapshot of the overall topics handled by the Customer Support Department.
- **When will it be used:** Monthly or on request.
- **Resources used:** 100% built on Google Sheets functionalities, for easy access and usabilty.

Final Dashboard (Spapshot)

- That autocompletes, with no need of adjustments.

CUSTOMER SUPPORT Analitycs - Montly Report

SATISFACTION
Based on Conversation Ratings 😃 or 🤩

Sellers	94%
Buyers	74%
Overall*	87%

0% 25% 50% 75%
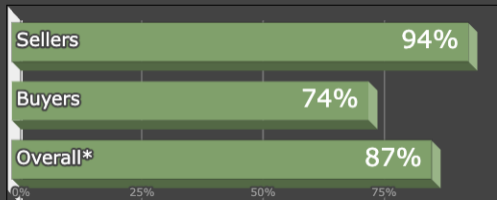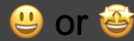
*Overall: includes other secondary contact categories

UTRUST Support CONTACTED by

- ● SELLERS
- ● BUYERS
- ● OTHERS*

46.4%
36.5%
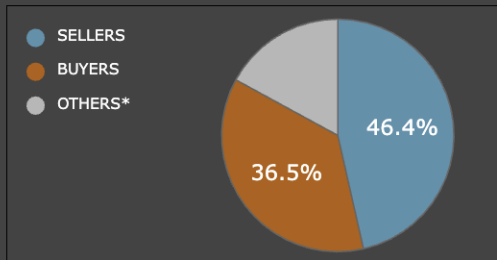
*Others: Bug Reports, Mrkt Proposals, HR etc. (excl. SPAM and Duplicates)

TOPICS RELATED to:

Account Updates   Refunds

| 69.1% | 30.9% |

0% 25% 50% 75%
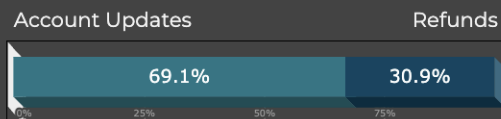
MAIN TOPICS for Contact   from SELLERS:

General Questions
Status Inquiries
"How To" Inquiries
Technical Issues
Account Updates
Feature Requests
Custom Reports
SignUp Issues

0 10 20 30 40 50

from BUYERS:

Payment Inquires
General Questi...
"How To" Inquiries
Technical Issues

0 10 20 30 40
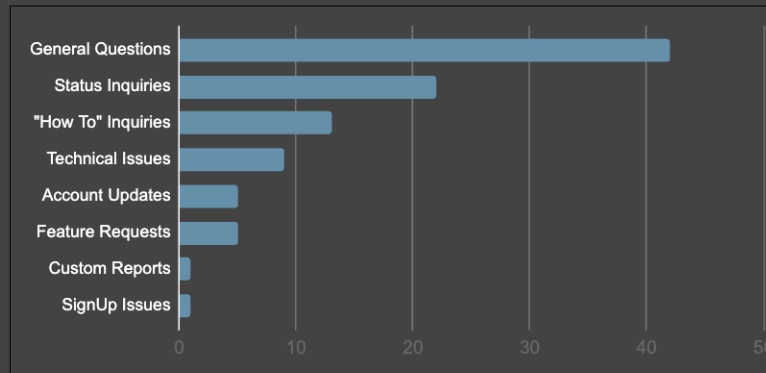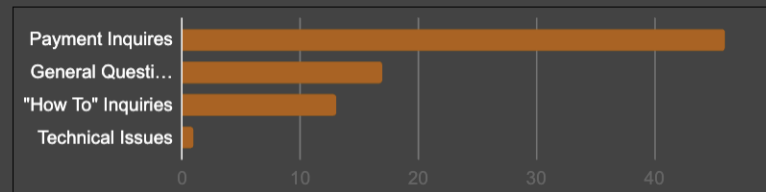
RESOLVED VIA SUPPORT CENTRE (ARTICLES / FAQ)

Self-Served (2056)   Asked for assistance (69)

| 96.8% | 3.2% |

0% 25% 50% 75%
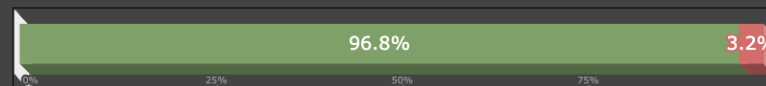
BackEnd structure and instructions for Customer Support Team (Spapshot)

- Intuitive WORK space for centralising the data
- With clear instructions to be followed by "non-analytical" team members

	A	B	C	D	E	F	G	H	I	J
1										For Raw DATA:
2	Satisfaction level based on				**Main Reason for Contact**					direct link to raw data
3	**Conversation Ratings**	😊 or 😆			**Sellers**	count	%			
4	Sellers	94%			General Questions	42	42.9%			For Raw TAGS:
5	Buyers	74%			Status Inquiries	22	22.4%			direct link to raw data
6	Overall*	86.80%			"How To" Inquiries	13	13.3%			
7	*Overall: includes other secondary contact categories				Technical Issues	9	9.2%		1	**STEPS:**
8					Account Updates	5	5.1%		2	Download Raw DATA from CRM and insert in First Tab
9					Feature Requests	5	5.1%		3	Check if any missing tags or Assigned Team/Member
10	**Contacted by:**	%	Nr		Custom Reports	1	1.0%		4	If needed, go back to each ticket, update with Tag and/or Assigned Team (member)
11	SELLERS	46.4%	98		SignUp Issues	1	1.0%		5	If any updates were made at the previous step, **export the Raw Data again and overwrite the first Tab**
12	BUYERS	36.5%	77				0.0%		6	AFTER the tags are revised, export Raw TAGS and add into the tab
13	OTHERS*	17.1%	36			98	100		7	Separate main tags into Levels (use **Split Text to Columns** from **Data** Menu)
14			211						8	Collect data for all the metrics needed in the report (Pivot Table reccomended)
15	*Others: Bug Reports, Marketing Proposals, HR etc. (excl. SPAM and Duplicates)				**Buyers**	count	%		9	Type the corresponding data into the yellow cells in this tab - EVERYTHING ELSE WILL AUTOCOMPLETE
16					Payment Inquires	46	59.7%		10	The DASHBOARD (last tab) will be automatically updated
17					General Questions	17	22.1%			
18	**Topics related to:**	%	count		"How To" Inquiries	13	16.9%			
19	Account Updates	69.1%	67		Technical Issues	1	1.3%			
20	Refunds	30.9%	30			77	100.0			
21			97							
22					**Resolved with Support Centre (Articles/FAQ)**		count			
23					Self-Served	96.8%	2,056			
24					Asked for assistance	3.2%	69			
25							2,125			
26										
27										
28										
29										
30										
31										
32										

Raw DATA | Raw TAGS | Tags Work | **Analytics WORK** | DASHBOARD