CUSTOMER SUPPORT Analitycs - DASHBOARD

Internal TOOL for a FinTech Company

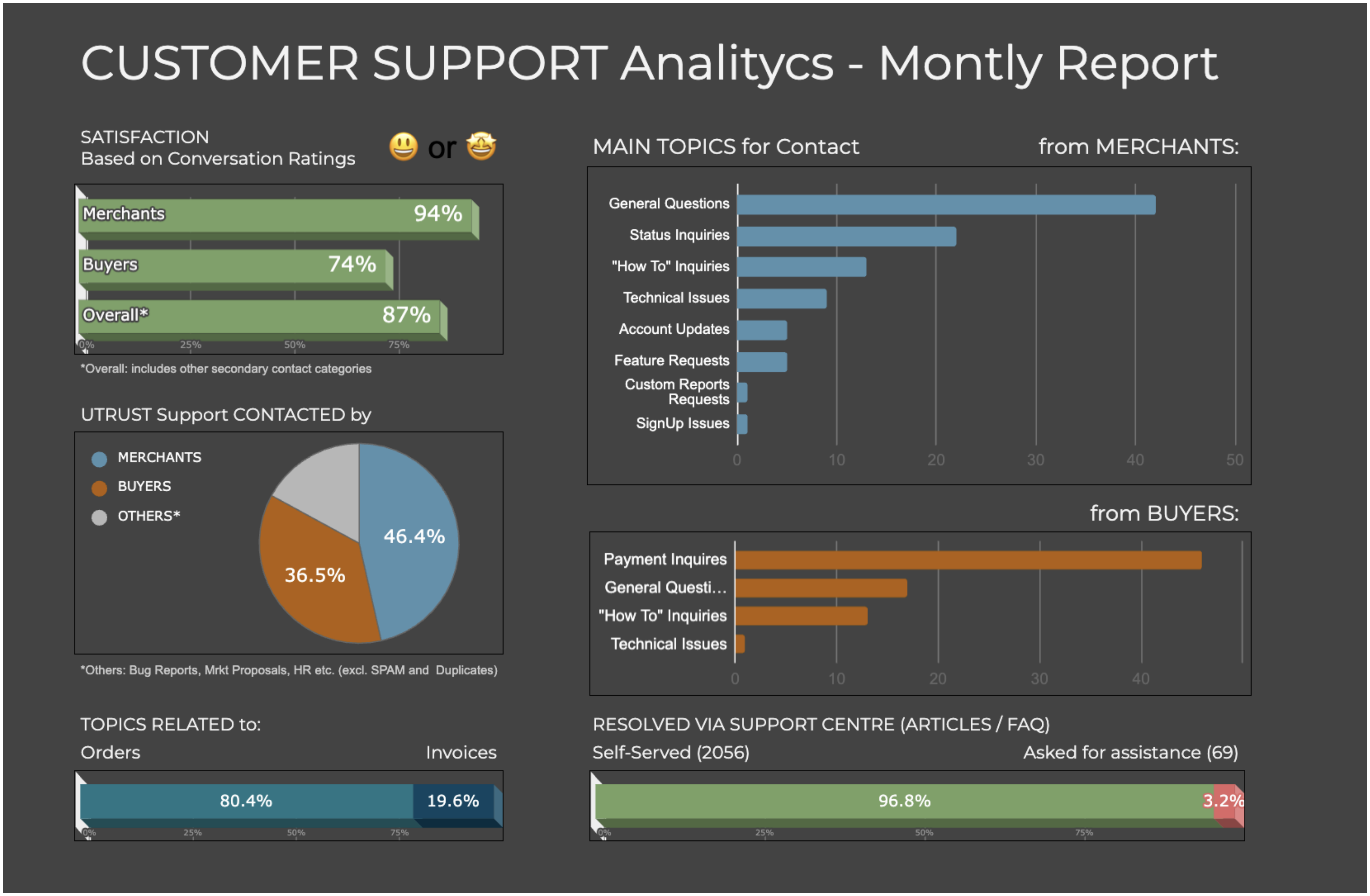
A clean, simple and intuitive dashboard created to assist the Customer Support Department of a FinTech Company.

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)



BackEnd structure and instructions for Customer Support Team (Spapshot)

Satisfaction level based on

Conversation Ratings	😃 or 🤩
Merchants	94%
Buyers	74%
Overall*	86.80%

*Overall: includes other secondary contact categories

Contacted by:	%	Nr
MERCHANTS	46.4%	98
BUYERS	36.5%	77
OTHERS*	17.1%	36
		211

*Others: Bug Reports, Marketing Proposals, HR etc. (excl. SPAM and Duplicates)

Topics related to:	%	count
Orders	80.4%	45
Invoices	19.6%	11
		56

Main Reason for Contact

Merchants	count	%
General Questions	42	42.9%
Status Inquiries	22	22.4%
"How To" Inquiries	13	13.3%
Technical Issues	9	9.2%
Account Updates	5	5.1%
Feature Requests	5	5.1%
Custom Reports Requests	1	1.0%
SignUp Issues	1	1.0%
		0.0%
	98	100

Buyers	count	%
Payment Inquires	46	59.7%
General Questions	17	22.1%
"How To" Inquiries	13	16.9%
Technical Issues	1	1.3%
	77	100.0

Resolved with Support Centre (Articles/FAQ)		count
Self-Served	96.8%	2,056
Asked for assistance	3.2%	69
		2,125

For Raw DATA:

direct link to raw data

For Raw TAGS:

direct link to raw data

1 **STEPS:**
2 Download Raw DATA from CRM and insert in First Tab
3 Check if any missing tags or Assigned Team/Member
4 If needed, go back to each ticket, update with Tag and/or Assigned Team (member)
5 If any updates were made at the previous step, **export the Raw Data again and overwrite the first Tab**
6 AFTER the tags are revised, export Raw TAGS and add into the tab
7 Separate main tags into Levels (use **Split Text to Colummns** from **Data** Menu)
8 Collect data for all the metrics needed in the report (Pivot Table reccomended)
9 Type the corresponding data into the yellow cells in this tab - EVERYTHING ELSE WILL AUTOCOMPLETE
10 The DASHBOARD (last tab) will be automatically updated

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