

# Customer Experience Case Study

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# Outline

1. Data Overview and Assumption
2. Operational health of processing team
3. Current end customer experience
4. Red flag in agent performance and efficiency
5. Suggestion on product change

## Data Overview and Assumption

- No Null. ~294k cases (70% type 3, 7% type 2), 342 actors.
- Unique Case Id = Unique Processing ID -> Assume no reopened case
- HANDLING\_TIME\_END > HANDLING\_TIME\_START. Ignore this row (assume data quality issue)
- Case is closed if final state is: 'APPROVED', 'CLOSED', 'REJECTED' or 'NO\_REVIEW\_NEEDED'
- When OPS\_DECISION != FINAL\_STATE -> inconsistent

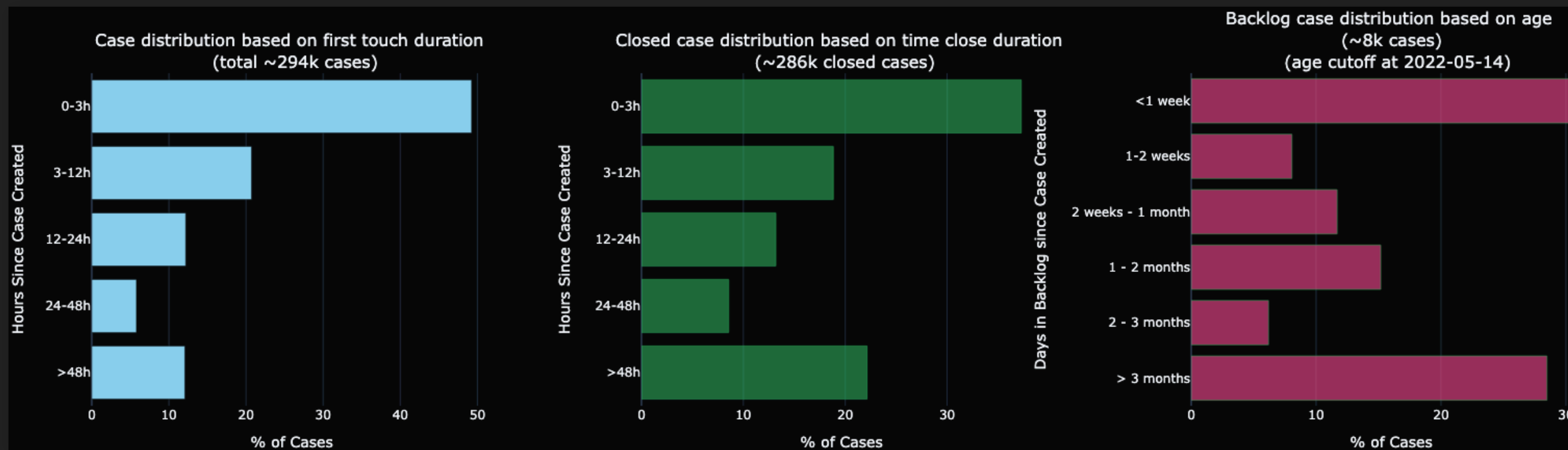
# Operational Health of Processing Team



## Operational Health of Processing Team

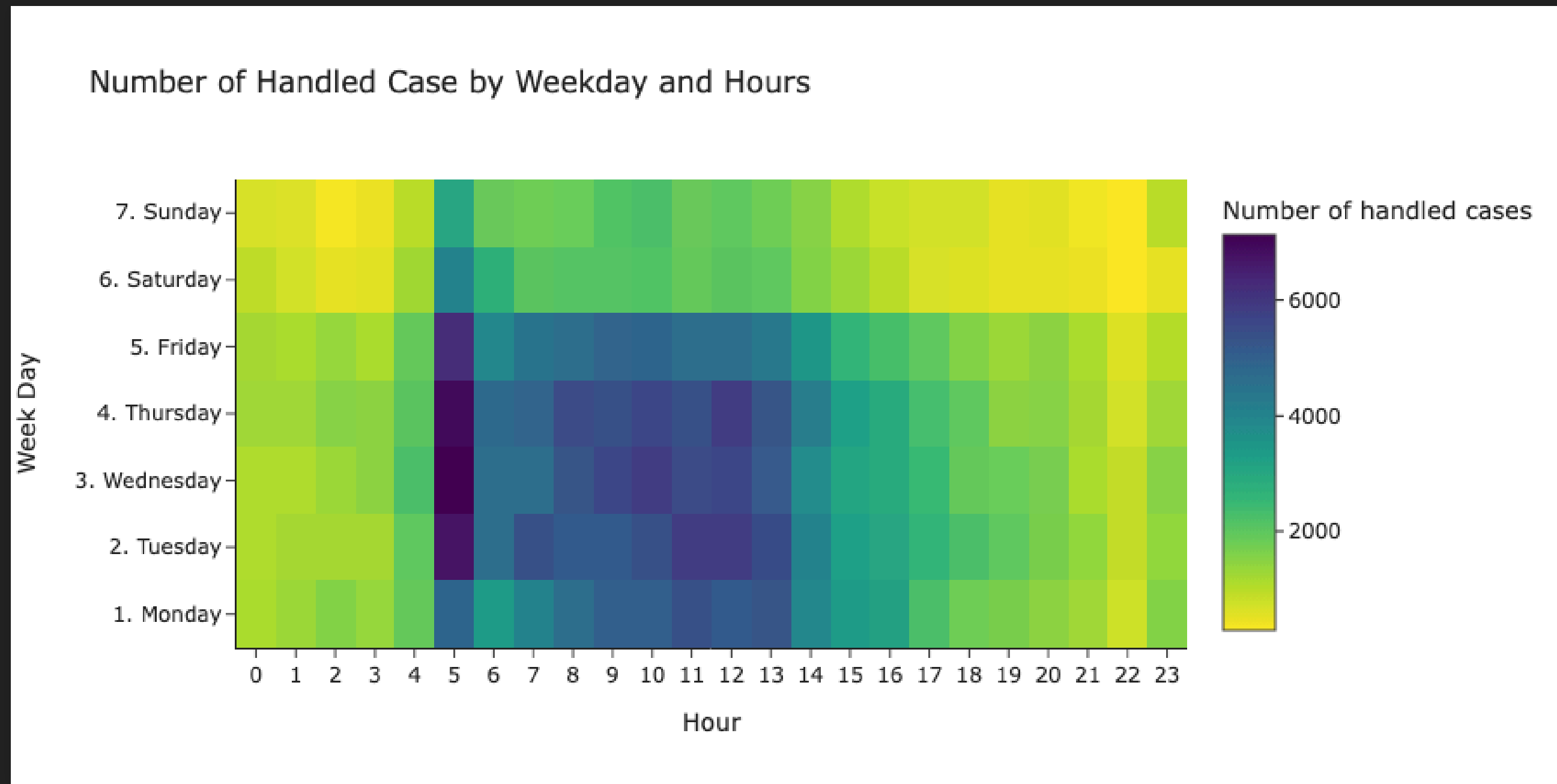
- Efficiency in case management (low backlog rate & efficient case closure)
- Generally responsive in addressing new cases (consistent first touch within 24h)
- Process case in a timely manner (handling time ~6 min)
- Some spikes in mean handling time time (e.g. 05 March) -> Probably some complicated cases
- Still some room for improvement in decision-making where LATEST OPS\_DECISION != FINAL\_STATE. (Mostly when OPS\_WAITING to close)

# Case Disbution based on Duration



# Case Distribution based on working time of handler

Service 24/7



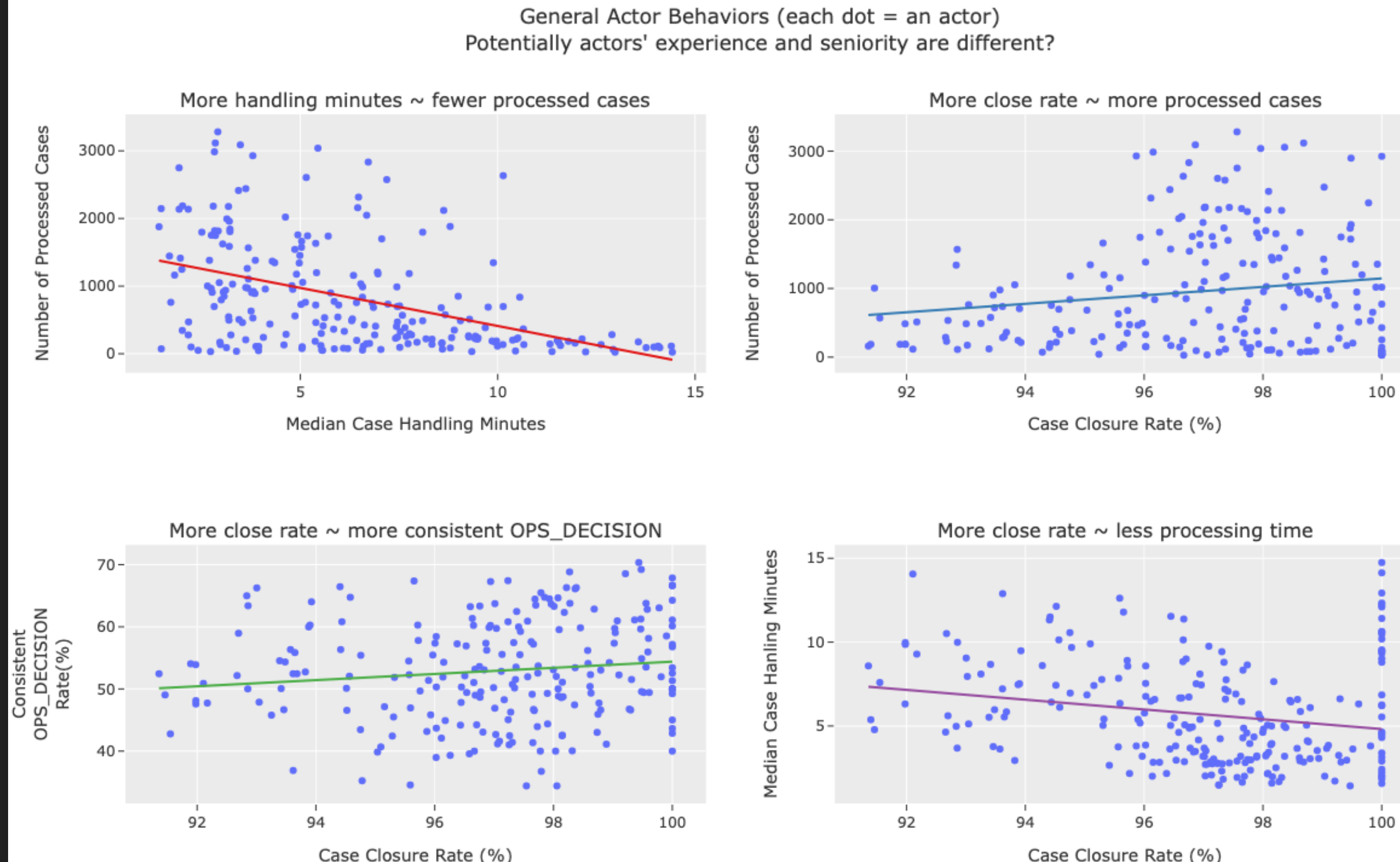
# Current end customer experience

- Instant: Responsive to customer inquiries or issues, and ~70% case closed within 24h created (Instant)
- Convenience: Service 24/7. Customers can get convenient support whenever needed
- Transparency: Miss some information about transparency from customer perspective (e.g. email/communicate customer with regular updates on the case status, and setting expectations for resolution timeframe)
- Free: Team's efficiency in managing cases (stable duration, low backlog) indirectly contribute to cost optimization and low-cost services for customers



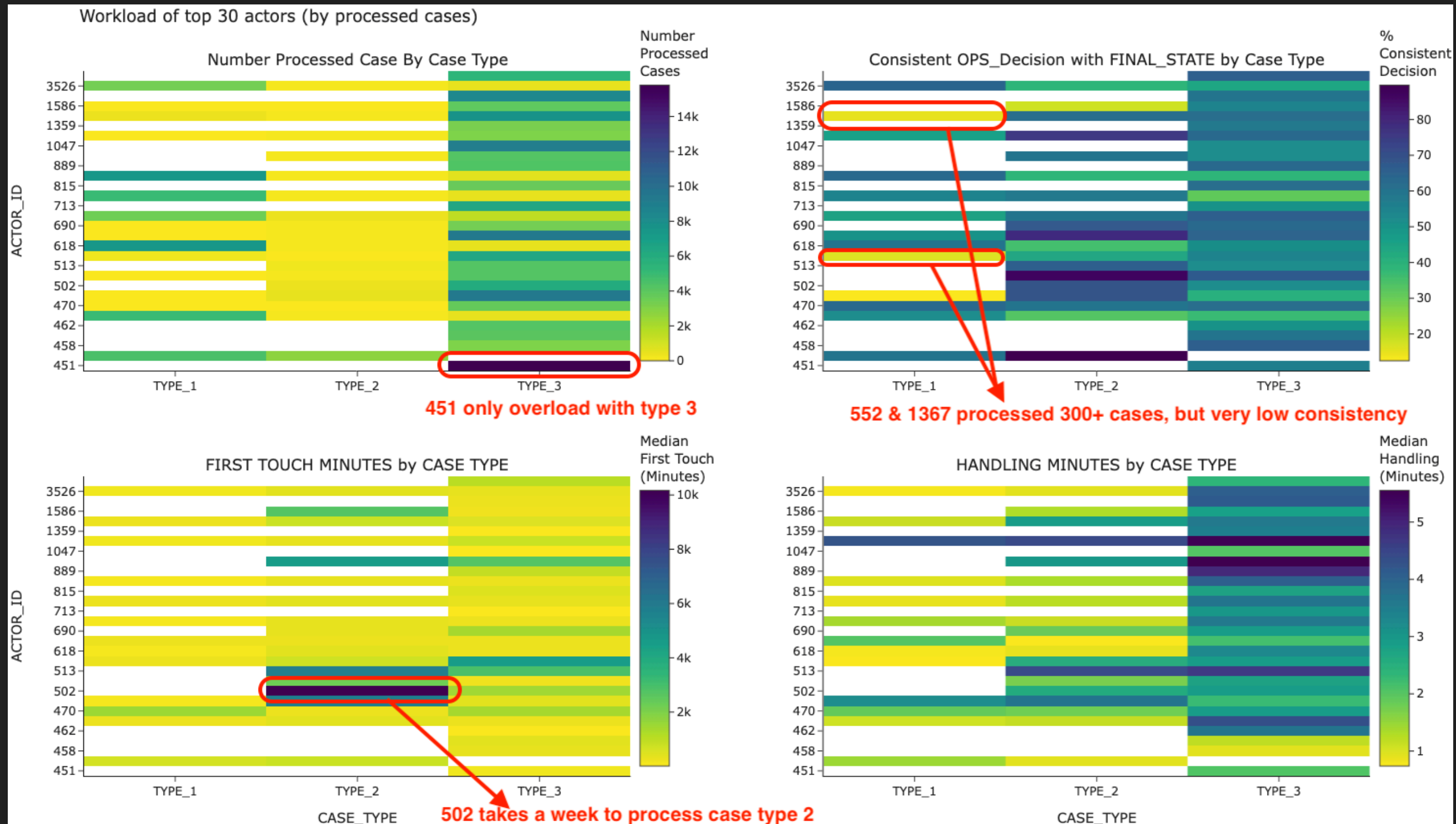
# Actor Workload, Performance and Efficiency

Potential gap in actor skills/seniority?



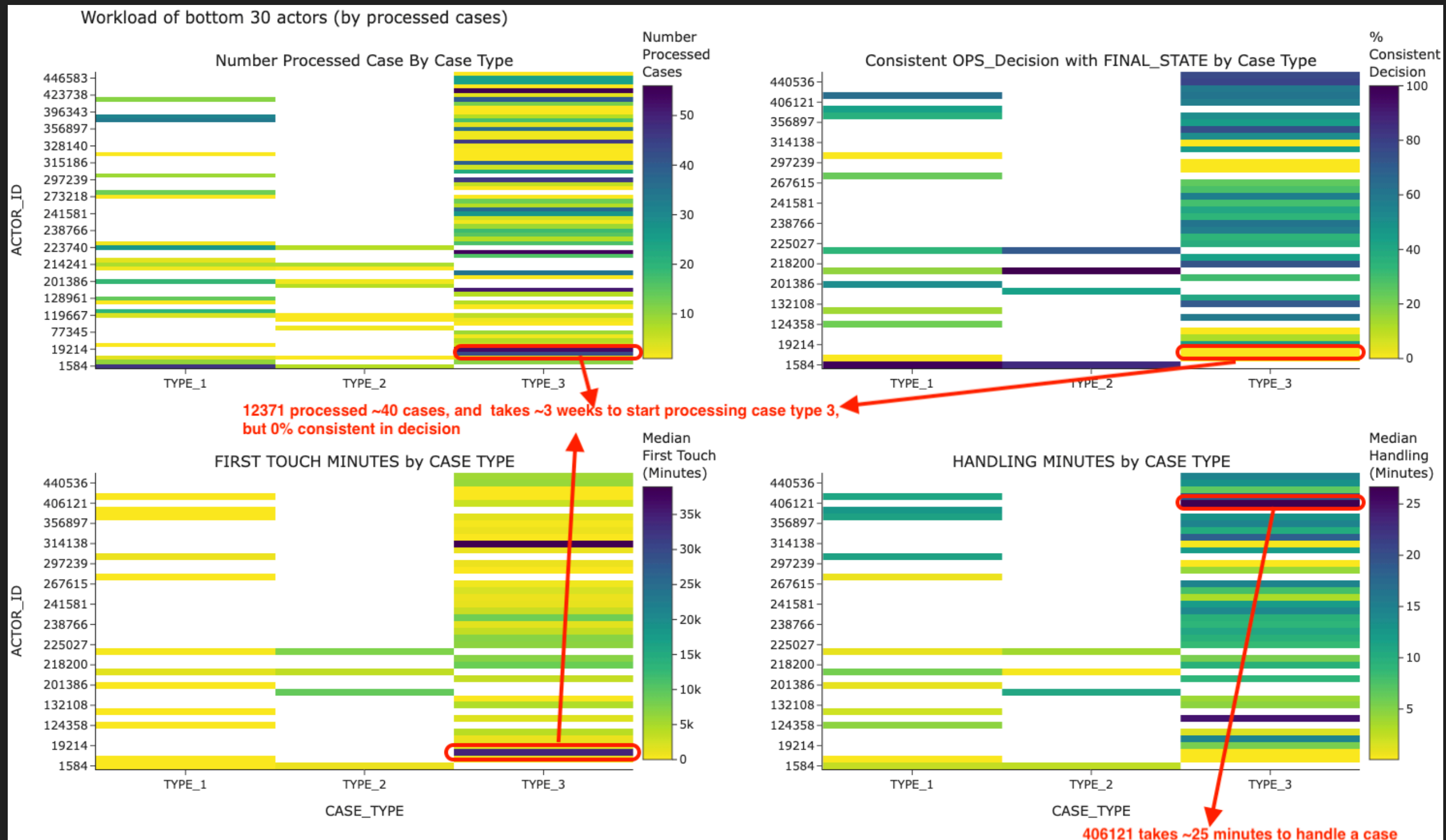
# Actor Workload, Performance and Efficiency

## Top 30 Actors (by processed cases)



# Actor Workload, Performance and Efficiency

## Bottom 30 Actors (by processed cases)



## Actor Workload, Performance and Efficiency

### Red Flags

- Non-uniform Workload Distribution (~50% cases processed by 10% actors)
- Potential mismatch between agent skills and case complexity
- Gaps in seniority/experience among agents

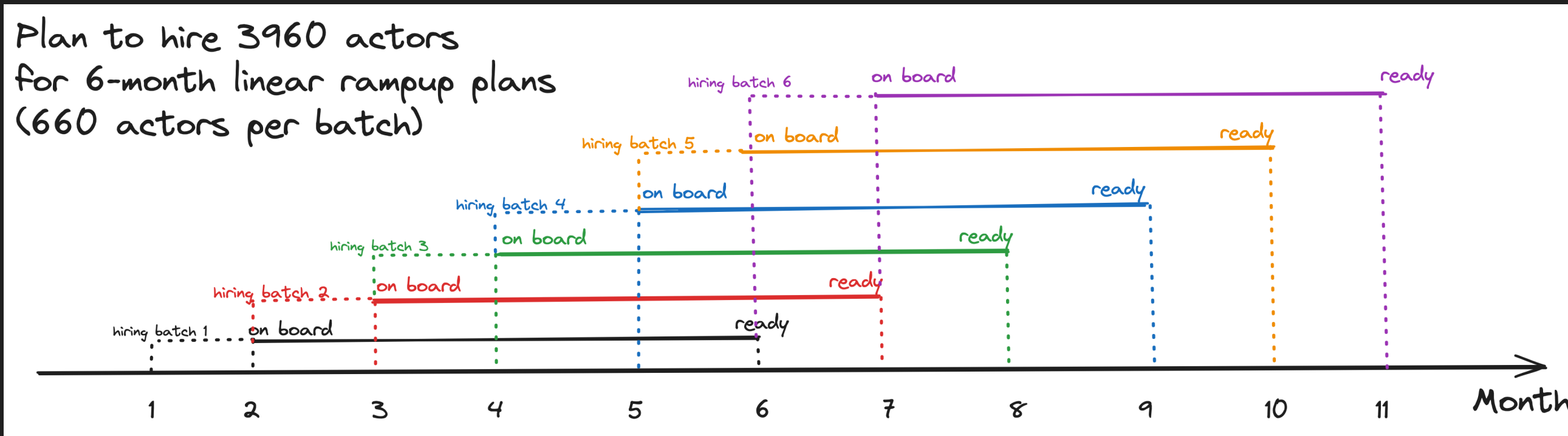
## Suggestion on product change

Current workload in Jan-2022 for type-3 Cases

- Cases = ~30k. Actors = 130, or 228 processed type-3 cases per actor
- Type-3 cases per customer  $\sim$  1
- Avg Handling Minutes = ~6
- Avg 1st Touch Hours = ~55
- Total type-3 cases = 196k  $\rightarrow$  5 times = 981k
- To keep productivity (cases per actor) with 5-times increase workload, we'll need ~4.3k actors (assume no actors leave)

# Suggestion on product change

## Example of hiring new resources for 6-month linear rampup



- Would take ~10 months for fully training new 3960 hires (660 hires/batch)
- If max capacity = 150 hires/batch -> would take 2 years
- Not only quantity. Important to improve agents' skills and experiences in decision making

## Suggestion on product change

### Details need to discuss and negotiate with growth team:

- Detailed timeline for expected rollout of the new product
- Projected adoption rate and user growth projections over time
- Challenge product team about the workload estimation and assumption
- Rampup phase is linear or different based on seasonality?
- Maximum capacity to hire per batch

## Suggestion on product change

### Potential Risks

- Unforeseen technical issues/bugs/compatibility with new product -> more cases
- User behavior changes with new product (churn ...)
- Hiring/training risks: unattractive package, limit budget ...
- External: regulation (GDPR), market, competition ...



## Recommendation on Next Steps

- Enhance actor training/onboarding program
- Predict case complexity and optimize case assignment based on agent skills and performance with Machine Learning or advanced optimization techniques
- Collect qualitative customer feedback for comprehensive view of customer experience