# **Step 1. Load Data**

* Import your transformed Excel (transformed\_transcripts.xlsx) into Power BI.
* Ensure columns like Quality Score, Complaint\_detected, Flag\_Non-first\_call\_resolution, Sentiment, Call Outcome, Disposition, Next Action, Caller Type, Agent Name are all there.

# **🔹 Step 2. Create Measures (DAX Code)**

### **1. Average Quality Score**

AvgQualityScore = AVERAGE('Table'[Quality Score])

### **2. FCR Rate (First Call Resolution)**

FCR\_Rate =

DIVIDE(

COUNTROWS(FILTER('Table', 'Table'[Call Outcome] = "Resolved on first call")),

COUNTROWS('Table')

)

### **3. Complaint Rate**

Complaint\_Rate =

DIVIDE(

COUNTROWS(FILTER('Table', 'Table'[Complaint\_detected] = TRUE())),

COUNTROWS('Table')

)

### **4. Complaint Resolved on Call %**

ComplaintResolvedOnCall =

DIVIDE(

COUNTROWS(

FILTER(

'Table',

'Table'[Complaint\_detected] = TRUE() && 'Table'[Complaint\_resolved\_on\_call] = TRUE()

)

),

COUNTROWS(FILTER('Table', 'Table'[Complaint\_detected] = TRUE()))

)

### **5. Non-FCR Flag Rate**

NonFCR\_FlagRate =

DIVIDE(

SUM('Table'[Flag\_Non-first\_call\_resolution]),

COUNTROWS('Table')

)

### **6. Positive Sentiment Rate**

PositiveSentimentRate =

DIVIDE(

COUNTROWS(FILTER('Table', 'Table'[Sentiment] = "Positive")),

COUNTROWS('Table')

)

### **7. Negative Sentiment Rate**

NegativeSentimentRate =

DIVIDE(

COUNTROWS(FILTER('Table', 'Table'[Sentiment] = "Negative")),

COUNTROWS('Table')

)

### **8. CXI (Customer Experience Index – combined metric)**

CXI =

0.4 \* DIVIDE(AVERAGE('Table'[Quality Score]), 100) +

0.3 \* [FCR\_Rate] +

0.2 \* [PositiveSentimentRate] -

0.1 \* [Complaint\_Rate]

# **🔹 Step 3. Build Dashboard Pages**

## **🟢 Page 1: Executive Summary (CXI Dashboard)**

* **KPI Cards**:  
  + AvgQualityScore
  + FCR\_Rate
  + Complaint\_Rate
  + PositiveSentimentRate
  + CXI
* **Line Chart**: CXI trend over time (x-axis = Month from Timestamp).
* **Donut Chart**: Sentiment distribution (Positive/Negative/Neutral).

## **🟢 Page 2: Agent Performance**

* **Bar Chart**: AvgQualityScore by Agent.
* **Stacked Bar**: Sentiment distribution by Agent.
* **Matrix Table**: Agent × {AvgQualityScore, FCR\_Rate, Complaint\_Rate}.
* **Top N / Bottom N**: Show Top 10 & Bottom 10 Agents by CXI.

## **🟢 Page 3: Customer Complaints**

* **KPI Card**: Complaint\_Rate, ComplaintResolvedOnCall.
* **Bar Chart**: Top 10 “Complaint\_what\_happened” issues.
* **Pie Chart**: Complaint outcome (Resolved vs Not Resolved).
* **Heatmap**: Agent × Complaint Rate.

## **🟢 Page 4: Call Flags & Behavior**

* **Stacked Column**: Flags by Agent (Non-FCR, ID Verification, Personal Advice).
* **Table**: Agent × Flag Counts.
* **Trend Line**: NonFCR\_FlagRate over time.

## **🟢 Page 5: Disposition & Caller Type**

* **Treemap**: Disposition distribution (top call reasons).
* **Matrix**: Disposition × Complaint Rate × FCR Rate.
* **Clustered Bar**: Caller Type × FCR Rate / Complaint Rate.

# **🔹 Step 4. Interactivity**

* Add **Slicers**:  
  + Date range (Month/Week).
  + Agent Name.
  + Caller Type.
  + Disposition.
* Enable **Drillthrough**: e.g., right-click on Agent → go to Agent Detail Page.

# **🔹 Step 5. Design Tips (Latest Power BI UX)**

* Use **green–amber–red** coloring for KPIs (conditional formatting).
* Use **Decomposition Tree** for CXI → breakdown by Complaint, Sentiment, FCR.
* Use **Tooltips** (hover to see extra info, like top complaint text).
* Keep layout clean: KPIs on top, visuals below, slicers on left/right.

✅ With this, you’ll have a **modern, interactive, innovative Power BI dashboard** that covers all transcript-based agent performance metrics.