Bench Accounting Case Study  
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**Explanation of Views and Tabs**

I decided to build my views around the tabs in the SQLite database. Each tab from “Associate Portfolio” onwards demonstrates some sort of metric based on the Baseline Metrics found within the questions.

The reason I did not combine all of them into one query is because of how wide and disorganized it would look when including every single metric into one. It is still theoretically possible to do this with a few more LEFT JOINs and additional measures in the SELECT query, with an ON function being applied to the associate’s name.

“Associate Portfolio” corresponds to Associate & Portfolio in the case study.

“Client Response Rate” corresponds to Responsiveness in the case study.

“Client Communications” corresponds to Client Communications in the study. The tab “How Many Contacts Past 14 Days” tells me how many clients were contacted **total** for the previous 14 days.

“Client Escalations” deals with Escalation, while “Associate Churn” corresponds to Churn in the case study.

“Client Health” corresponds to the Client Health Score in the study.

“Incomplete Tasks” deals with the Work In Progress metric in the case study.

**Explanation of Queries**

I initially created two tables, specifically sorting out individuals with “Associate” in the job title. Based on the reporting structure of the company, the supervisor of these individuals would be the team lead.

The second table that I created specifically sorts out individuals with “Team Lead” in their job title. Based on the reporting structure of the company, the supervisor of these individuals would be the Operations Manager.

This way, I was able to perform an inner join specifically on the supervisor of the associate with the name of the supervisor on the teamleads table, letting me return the supervisor on the teamleads table as the OperationsManager.

The Associate Portfolio tab is based on the original created associates table. Certain fields were required to be changed, as calculations were meant to be done prior to 2022-04-13. This meant that the “infinite end date” issue had to be resolved by changing all the end dates to 2022-04-13. I am not aware of any BOOLEAN field being present in SQL’s coding, so the fields that are created that contain FALSE or TRUE are strings. I did not know how to set some NULL fields to FALSE, as they are a part of another LEFT JOIN and I was not comfortable nesting so many functions in one another, without knowing whether they would improve the quality of the view.

For some metrics, such as Client Escalations, Associate Churn, and Client Health, there was not always an AssociateName tied to the metric. I contemplated on removing this field altogether, but I figured there was explanations for this. One explanation could be, for example, a general escalation was filed without naming an associate. I also believe that in cases such as Associate Churn and Client Health, there was simply incorrect or missing data for the associate name. Because there were still numbers in the count, I decided to include it in the field.