Ecommerce Concierge Department -Case study

Assumptions Made:

- The dashboard is viewed only by Concierge Department and their leads
- The data is up to date synced real-time
- It is an operational report to be viewed daily so default values displayed should be recent.
- To view long term data, option to select date range should be given

Step 1- Collaborating with Business and gather requirements

Understanding the Business Issues

At the start of the project, the focus is to get a clear understanding of the overall scope of the work, business objectives, information the stakeholders are seeking, the type of analysis they want you to use, and the key deliverables. Defining these elements prior to beginning the analysis is important, as it helps in delivering better insights. Also, it is important to get a clarity at the beginning as there may not be another opportunity to ask questions before the completion of the project.

Know your audience:

First and foremost, you need to define your audience: for whom are you creating your data visualization? What kind of people or professionals are they, what do they do and what are they looking for?

- GOAL ?

In this case study, we are looking into concierge department to help them perform efficiently by identifying the key performance metrics from relevant and accurate data.
This is to support them in their day-to-day business

- Who?

Assuming the dashboard is shared to the Concierge team for daily tracking and leads/head of the Concierge -style advisors department for decision making based on the metrics.

- What info / metrics are they are seeking for?

Our audience is composed of Customer service-style advisors' team and higher managers of the department.

The Key metrics they are interested in are.

1. The total monthly Sales Vs Monthly Sales generated through style advisors
2. Call Volumes
3. CSAT (Customer satisfaction Rate)
4. Average Handle times

5. Hold Times

6. # Customer interactions Handled per weekday:

Step 2-Pre-requisites for development and your technical design process

- **Understanding and Analyse the Audience**
  Understanding who is the audience , what metrics they are looking for and why do they want to see them.
  Here Our Audience : Concierge team & their leads
  Goal : The team to see a dashboard with concierge department performance metrics displayed which can be used to improve their service performance and make effective decisions

- **Know the relationships between Data:**
  Looking at raw data in all its numerical, tabular, row-and-column glory is far from the most intuitive way to understand it. Knowing the data points will help you to illustrate how they are connected to one another, provide insights more quickly and identify hidden patterns and trends. Assuming data is clean. Once you are aware of the data and type of data you can use many charts such as bar charts, line charts, area charts, scatterplots, etc. Choice of a particular chart type for the data visualization may also be constrained by the number of variables you want to graph, or you may want to choose your chart type based on what type of pattern you are trying to show (comparison, part-to-whole, hierarchy, etc.)

- **Data Sync Interval**

  Knowing when will the latest available data is synchronized to platform. This helps to give an up-to-date report.

- **Deciding which visual is best**
  deciding which visual should be used to best represent the information.
  For this project, it will be mostly displaying KPI's and comparing the data with bar charts.

- **Choosing the tool for the project**
  Depending on the organization's requirement this can change. For this project we are using Google Big Query and Tableau as a front-end tool to deliver the solution .

- **User Interaction**
  It is always a good idea to present a simple report and then giving the Users the ability to interact with the data. You can consider making your visualization dynamic with filters, drilldown capabilities and more. This provides a more engaging experience and increases user adaptation and make visualization effective. Some interactive tools:
    - **Filters and Selectors:** Flexibility is key

    - **Hover and Drill Down Interaction:** Provides opportunity for interaction
- **Clarify your message with color**

  With color, if we overuse it, we lose the ability to focus our audience's attention, where we need it to be. It will get dissipated. But if we underuse it, we lose the ability to really direct our attention . So, it is about trying to find the right balance. Colors should be used sparingly, consistently across all reports and designed to contrast in color with care.

  Dos:

    - **Use one color to represent continuous data** – Representing continuous data and ranges by varying the saturation or value of a color makes you chart straightforward and easy to read.

    - **Use contrasting colors for comparisons** – Contrasting colors help the viewer differentiate the data quickly
    - **Use colors that appear in nature** – People respond better to colors they are familiar with; colors that appear naturally in the world around them.

    - **Use branded colors for marketing materials or presentations** – Customizing your data visualizations to match your company's color scheme helps you align with your brand and keeps your messaging consistent. It also helps with brand recognition.

    - **Use color to highlight your most essential information** – Color can be a great way to guide the viewer's eye to key points on your chart. We suggest using muted colors with one bright color to bring attention to your most essential information.

  Don'ts:

    - **Pick colors that are too hard to distinguish** – It is important for your viewer to be able to understand the data you are presenting. If they need to quickly make comparisons, the colors need to be easy to distinguish.

    - **Use too many colors** – Try to avoid the rainbow effect! Less is more. Make sure the colors you choose have a purpose and make your chart easier to read, not harder.

Step 3- Data visualization guidelines and recommendations

1. **Choose the chart that tells the story:** There may be more than one way to visualize the data accurately. In this case, consider what you are trying to achieve, the message you are communicating, who you are trying to reach, etc.

2. **Remove anything that does not support the story:** That does not mean you kill half your data points. But be mindful of things like chart junk, extra copy, unnecessary

illustrations, drop shadows, ornamentations, etc. The great thing about data visualization is that design can help do the heavy lifting to enhance and communicate the story. Let it do its job and don't use 3D charts—they can skew perception of the visualization.

3. **Design for comprehension:** Once we have our visualization created, take a step back and consider what simple elements might be added, tweaked, or removed to make the data easier for the reader to understand. You might add a trendline to a line chart. You might realize you have too many slices in your pie .These subtle tweaks make a huge difference.

4. **Labeling:** Labeling can be a minefield. Readers rely on labels to interpret data, but too many or too few can interfere.

5. **Double check that everything is labeled.** Make sure everything that needs a label has one—and that there are no doubles or typos.

6. **Make sure labels are visible.** All labels should be unobstructed and easily identified with the corresponding data point.

7. **Label the lines directly.** If possible, include data labels with your data points. This lets readers quickly identify lines and corresponding labels, so they don't have to go hunting for a legend or similar point.

8. **Don't over label.** If the precise value of a data point is important to telling your story, then include data labels to enhance comprehension. If the precise values are not important to telling your story, leave the data labels out.

9. **Don't set your type at an angle.** If your axis labels are too crowded, consider removing every other label on an axis to allow the text to fit comfortably.

Step 4 - Identifying risks in the project

Inappropriate selection of data visualization:
Different views answer different questions, and different charts tell different stories: you should choose them with care. For example, selecting a pie chart to display different means of communication will not make more sense as it is not showing any useful information

Poor selection of colors:
The wrong color can lead to confusion, or even worse, misinterpretation. For example, red is often associated with something negative. Linking the color red to data that is relatively less good than an alternative but not per se bad can cause misinterpretation.

Unclear message and complex data visualization:
It is important to present information which is clear and easy to understand to make sure that the audience understand it clearly and can take actions from the visualization

How to avoid these risks:

Choose the data visualization carefully:
The pie chart is a popular choice to visualize percentages that add up to 100%, but it is often not the optimal choice. Beyond a few slices, it is hard to compare the relative size of each section. Bar charts are the workhorses of data viz for good reason (for a longer list of variables, horizontal bar charts often work better).

Color selection (look and feel):
The colors in the visualization should be meaningful and clearly indicate what does they represent. Do not add too intense colors making the visualization unattractive. It is substantial to have the correct data a simple visualization that make more sense rather than colors. Consider the color blind and use shapes and colors that are easiest for people to see. Do not rely on color alone to convey meaning.

Less is more:
Be clear and concise about the visualization. One visualization should represent a clear message and should not leave audience in the confusion. Avoid using interactivity as most of the time audience might not be aware of it making it more confusing and useless for them. Provide clear single message with visualization at first and then can move ahead with further details on user demand. This makes it clear for user regarding what information they are looking at and what they need. This avoids any confusion to the audience.

Step 5 - Identifying success measures for the project

Well defined goals and KPIs in the Dashboard:
Goals can be defined for all processes and phases of the online sales funnel and can be checked continually using Analytics. The best practice is defining and dismantling business processes as partial processes and expressing this success in mathematical relations.

The Metrics that we should show in Concierge Department analytics will be as follows:

- ***The total monthly Sales Vs Monthly Sales generated through style advisors***

    - The metrics figure shown must be a Conversion Rate – Percentage of style advisors Sales out of total sales . This metric helps to identify how sales are impacted through concierge services. Higher the percentage implies the benefits of this service.

    - A line chart showing with monthly total sales Vs Monthly sales through style advisors. This helps us to investigate previous few months sales data to compare the progress . also, to determine that the concierge team helps with sales growth.

- ***Call Volumes***

  - Call volume metric figure : Call volume simply refers to the total number of conversations through Phone,chat,email. Overall, the call volume analysis provides a general pulse to the health of your support organization , product, and website.
    - Call Volume by weekday: Calculating the ticket request volume all you must do is compare the call volumes for a month for each weekday. Pay particular attention if the number of call spikes after a new product or feature release to the website. If you want to reduce that response or hold times, you should evaluate the number of issues you receive on a daily or monthly basis. Knowing your solicitation rate lets you plan and adjust the staffing needs and schedule. More agents available will reduce the response time and can assign lesser staff on nonpeak hours on the weekday. This can indeed help to use resources efficiently.

- ***CSAT (Customer satisfaction Rate)*** : CSAT is the satisfaction score calculated based on a survey filled with the customers stating how satisfied they are with your service. CSAT can be calculated by sending a survey to the customer immediately after a purchase or support interaction. The customers rate your company on the scale of “Not Satisfied at all” to “Very Satisfied.”

  What makes this customer satisfaction metric more important is the fact that it helps you identify unsatisfied customers that could churn or leave you negative customer reviews. So, it is safe to say that this metric will help you predict or prevent customer churn or negative reviews. We can also track this metric so that to identify satisfied customers that you could act as brand ambassadors.

- ***Average Handle times*** : is the average amount of total time taken to resolve customer queries from beginning to end. This time includes the time spent interacting with the customers on calls and the time between interactions. Lesser the average handling time, more satisfied, are the customers and higher are the chances of them coming back to you again.

- ***Hold Times***: How long, on average, people are kept waiting in line before reaching a style advisor. Customers will only wait so long. By tracking how long the wait is right now, you

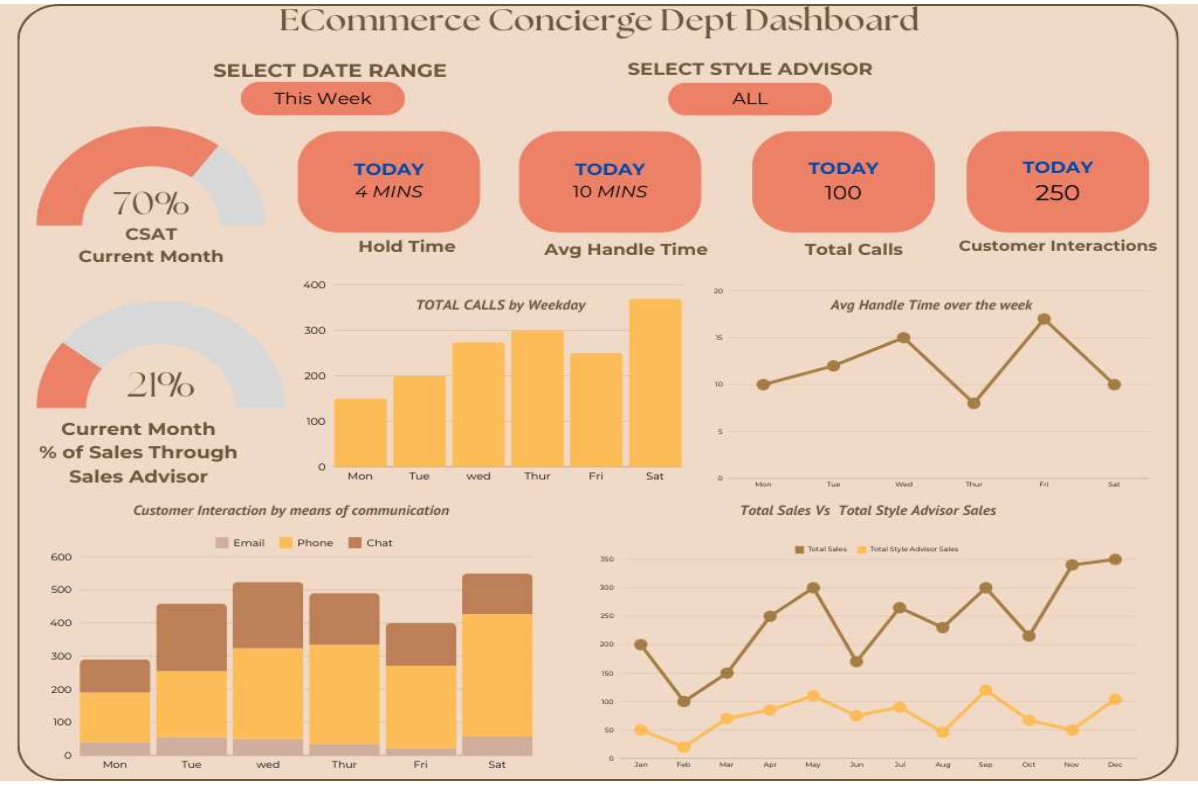
will know if your staffing levels need to be increased or if your wait times are within acceptable limits.

- ***# Customer interactions Handled per weekday:***
  - #Customer interaction handled : How many customers were handled current week, day, or month (by default month)

  - # Customer interactions Handled week over week by communication medium: The graph gives an idea about total customer interactions came through different medium of communication and a comparison on which medium(email,chat or phone) is more preferred by the customer.

- All these metrics will be shared as a Single Dashboard for short term(Monthly).
- There will date range select option to see long term time series data to compare with previous data.
- Also, there will be Style Advisor Multi Select option (By default selects ALL) to see individual style advisor metrics.

Attaching the rough sketch by hand of the visualization expected to create



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