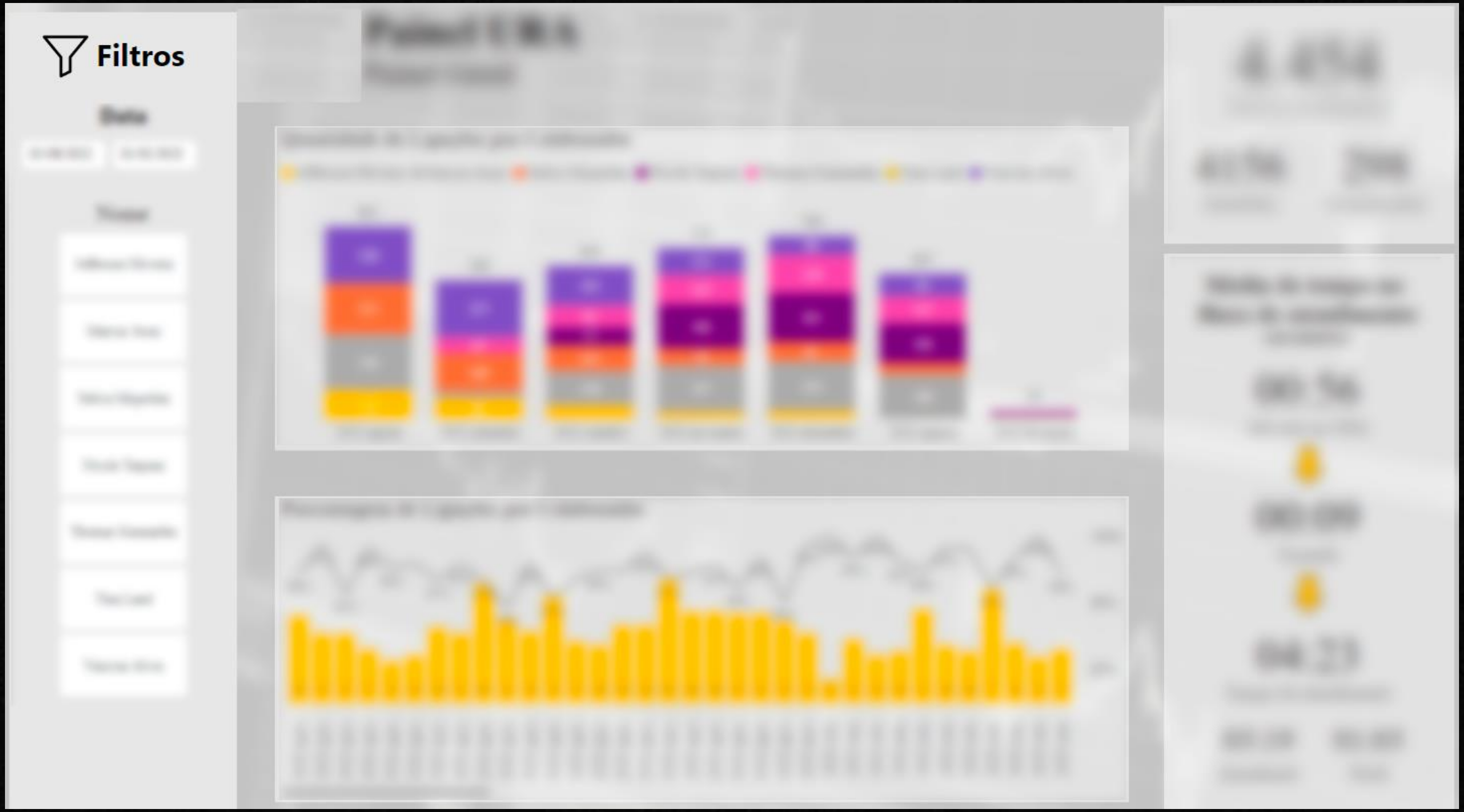
MIDDLEOFFICE ANALYSIS

This Power BI was made to compile the main KPI's of the Middle office team, such as phone calls, received and sent emails and chats in Microsoft Teams.

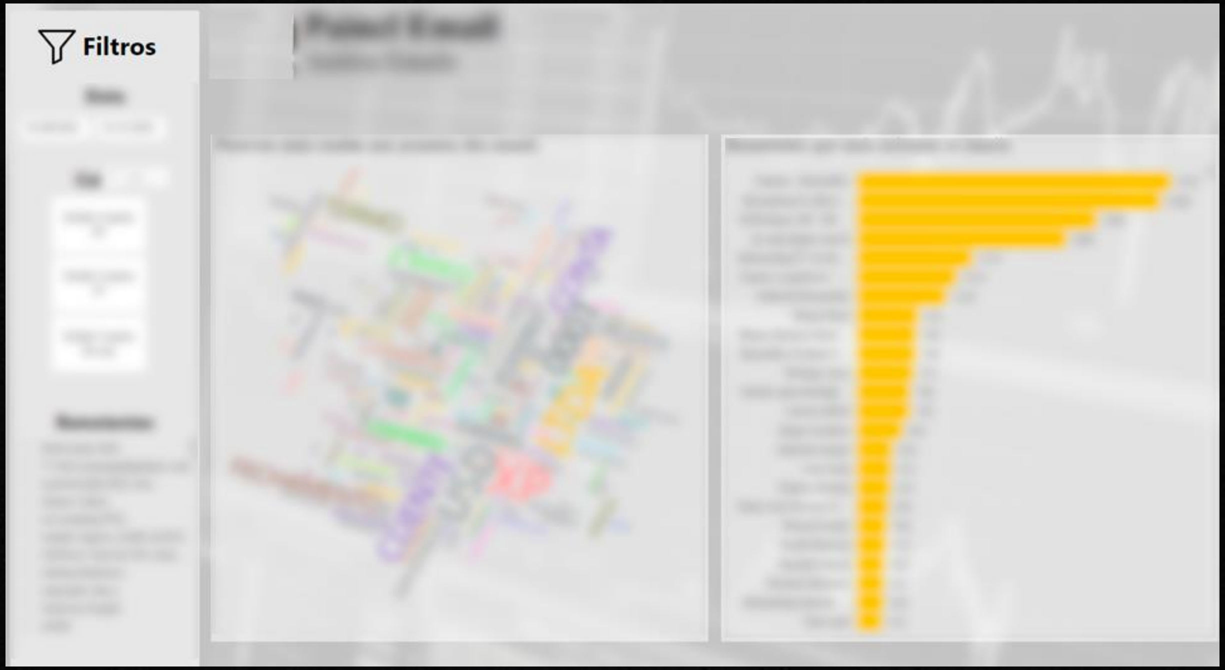
The first tab shows call data, such as the number of calls answered by operator, percentage of calls answered and abandoned per day and the average time per call, divided by steps



This second tab shows the main peak phone call times, as well as the main top offenders in terms of number of calls.

This third tab shows a more qualitative view of the phone call data, dividing the information by type of request and type of customer. As our internal system does not have the possibility of inputting qualitative data, an integration with Microsoft Forms, Microsoft Power Automate and Excel was carried out.

The next two tabs show mailbox data. The Line charts show data over time for the number of emails received and sent.
The Word cloud shows the most used words in email titles and the bar chart shows the top offenders in terms of emails received



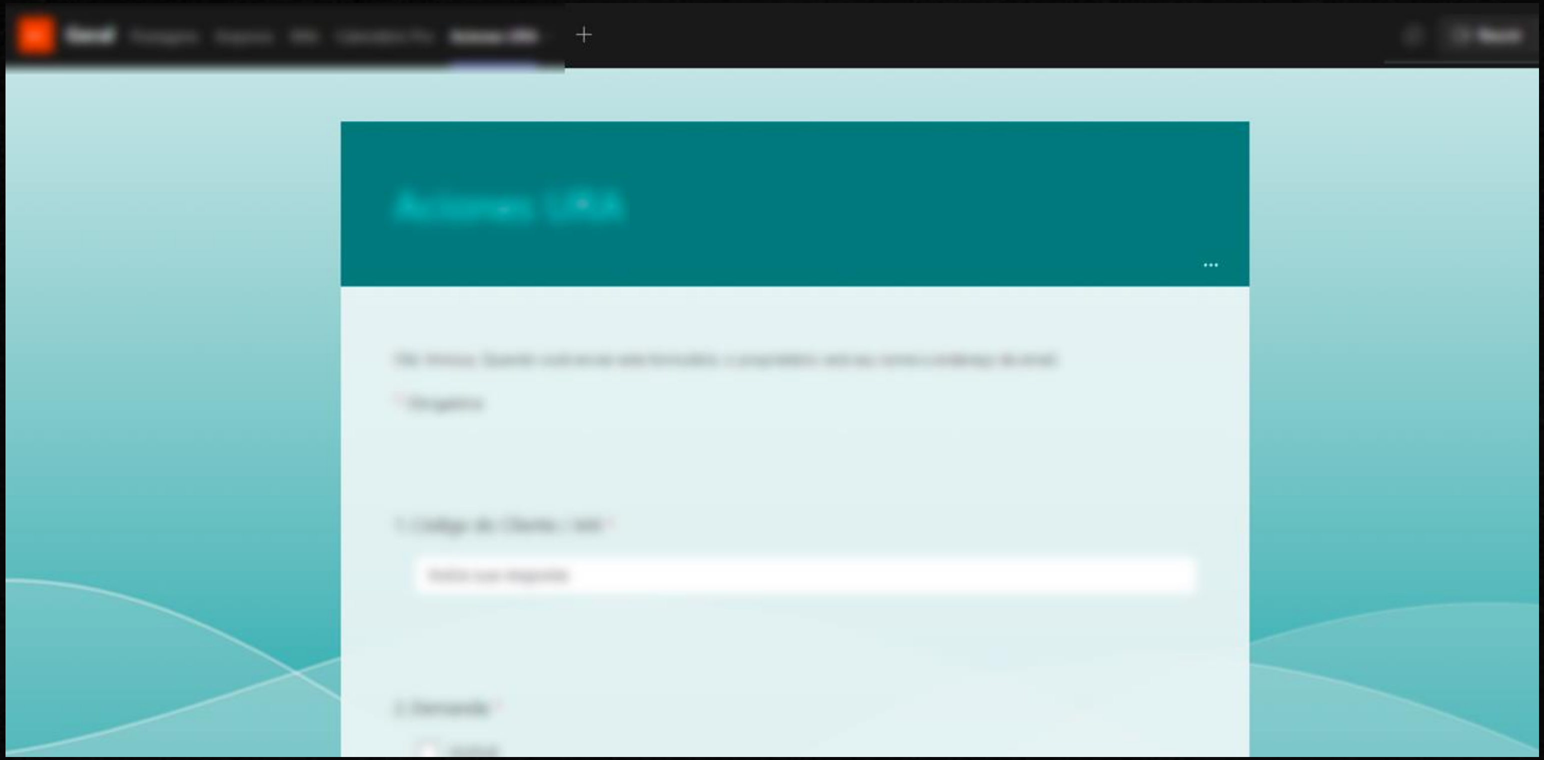
This last tab shows data from chats in Microsoft Teams. In order to collect this data, it was necessary to integrate with Power Automate, which I will talk more about in the technical session.

We have the number of calls to the Middle office team, separated by chat. We also have top requesters, top customers and top request types. Finally, a word cloud to view the topics most described in the "Others" field

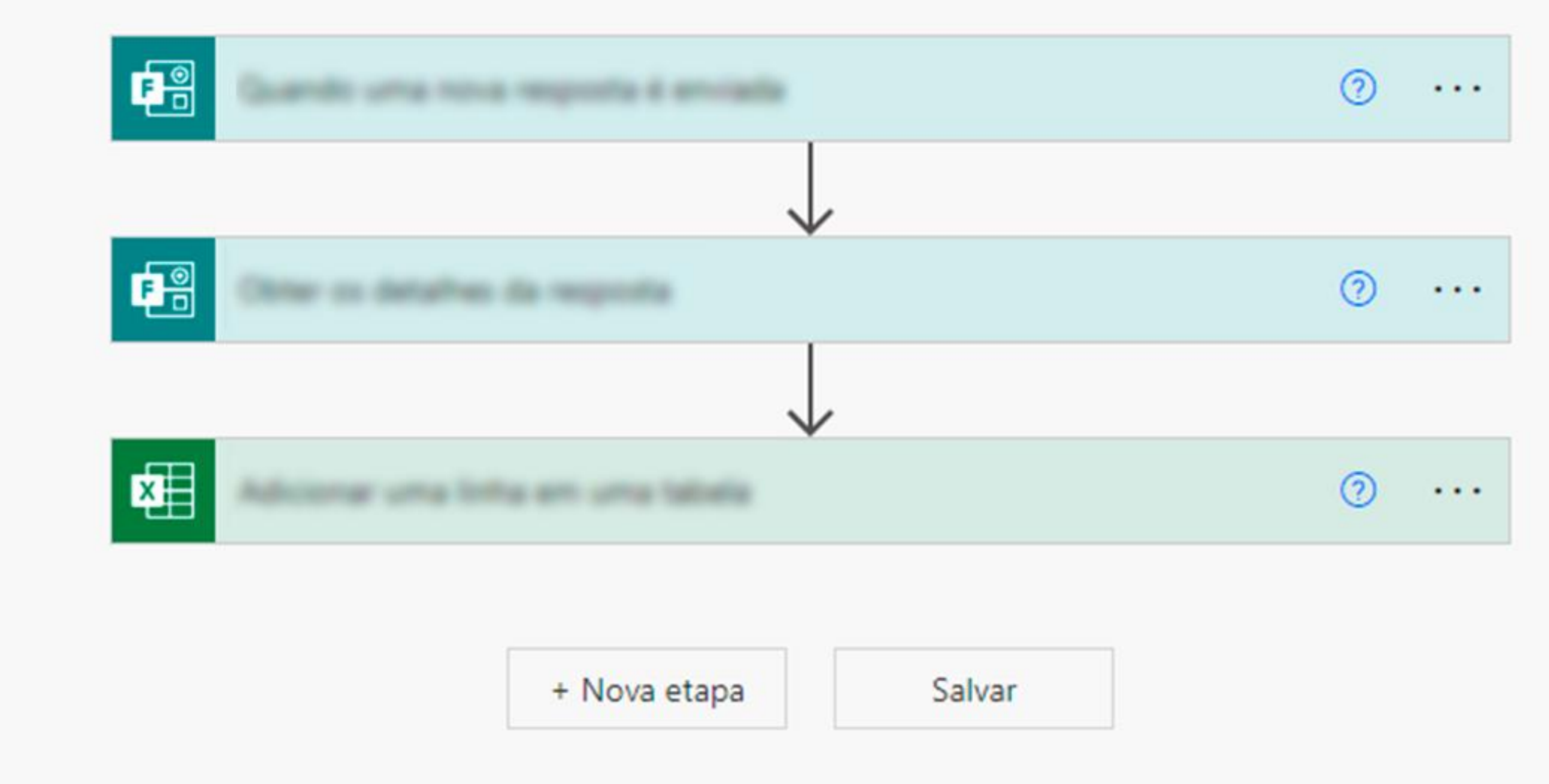
TECHNICAL

Integrations were required with multiple data sources. Phone call data is in MS SQL Server, qualitative call data is in MS Forms, email data is in MS Outlook and chat data in Teams is in MS Teams.

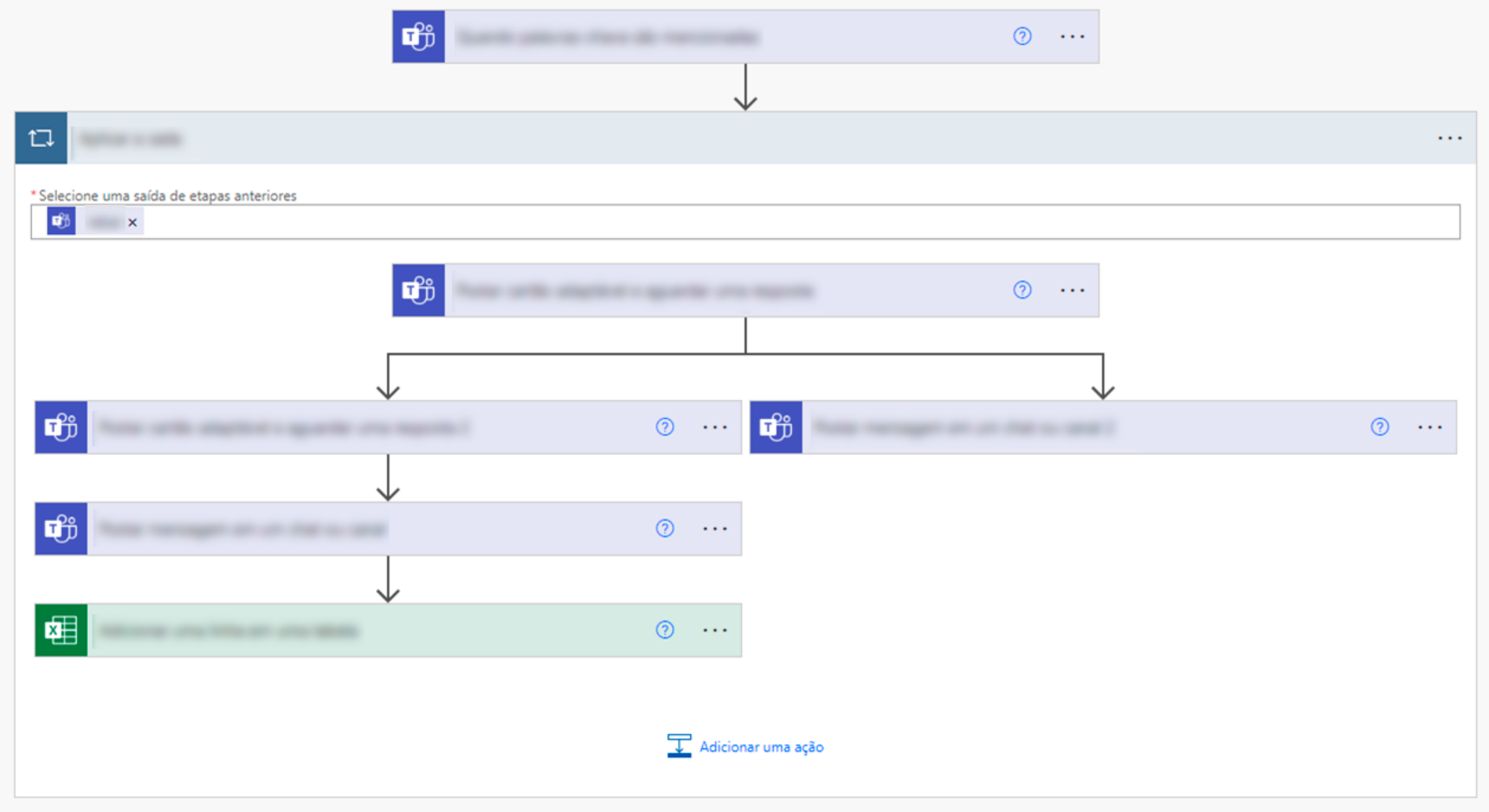
To collect qualitative data from phone calls, analysts fill out a Form pinned to the Teams team



When filling out the Forms, a flow in Power Automate is activated, automatically filling in the information in an Excel spreadsheet in SharePoint



To collect the data from Teams, an integration with Power Automate was required.
When someone needs to make a request to the Middle office team, the requester types a keyword in the Teams chat and an adaptable card automatically appears in the chat.
When filling in the card fields, another card is generated in the Middle office group with the request data.
Upon completion of the request, the Middle office team fills in the card with the final information, and a response is automatically generated for the requester.
At the end of this process, all data is recorded in an Excel in SharePoint



RESULTS

The integration with MS Forms enabled a qualitative analysis of the phone calls.

The integration with Power Automate made it possible to quantify and qualify the services provided by Teams chats.

Finally, the Power BI dashboard brings together all the information, generating insights and enabling proactive actions regarding future demands.