

SUMMIT 08



MEASURING AND CONTINUOUSLY  
IMPROVING THE CONTACT CENTER

Reporting 101

Dennis Finn - Professional Services

**RIGHT  
NOW.**

- Contact Center Metrics and supporting reports
- Simple ideas for improving each Metric
- Underlying tables used in reporting
- Best practices for building custom reports
- Useful Reporting features - Building
- Useful Reporting features - Running/Analyzing
- Key Resources

- Self Service Rate
- First Contact Resolution Rate
- Average Response Time
- Average Resolution Time
- Cost per Incident - by channel
- Customer Satisfaction

# FOR EACH METRIC

- Which Standard Report supports it
- Supporting measures and reports
- Underlying tables
- Ideas for improving

## Session Activity Report

- Part of Site Effectiveness dashboard
- Uses session\_summary Table
- Measures percentage of total sessions that do not result in an Ask A Question submittal

Activity	Count	Percent
View Answer	268	39.8 %
Search	87	12.9 %
Search & Answer	51	7.6 %
Submit Question	23	3.4 %
Self Service Rate	650	96.6 %
Sessions	673	0.0 %

- Maintain Relevant, Accurate, Complete, and Clear Knowledgebase Content
  - Keyword Search Report - ensure all keyword search terms have relevant KB content
  - Answers Viewed Report - review Answers with high hits for strength, low hits for weaknesses
  - Answer Feedback - review for clarifications or corrections needed to Answer content
  - Information Gap Report - use to add content to the Knowledgebase where there are gaps

# FIRST CONTACT RESOLUTION RATE

## Agent Effectiveness Report

Agent	Assigned	Responses	Solved	RPA	FCRR
Jon Franklin	5	5	3	1.0	75.0%
Chloe Finnly	18	18	16	1.0	88.9%
Aidan Parker	48	51	47	1.1	91.7%
Martin Smith	66	73	62	1.1	95.3%
Mike Jones	4	5	4	1.3	75.0%
Simon Schmidt	67	73	63	1.1	86.6%

- Measures percentage of incidents that are Solved with the first response sent by the Agent
- Uses the Incident Performance Table

- All Previous KB-centric improvements - Agents need a well maintained knowledgebase
- More training and coaching for lower performing Agents
- Best practice knowledge transfer from the higher performing Agents
- Grant agents authority to solve problems without escalation
- Improvement could come at the detriment of Average Resolution Time

## SL by Incidents (Rel) Report

Date /	Incidents	Service Level 1	Service Level 2	Service Level 3	Service Level 4
2008/09/10	1332	41.5 %	4.4 %	7.1 %	3.2 %
2008/09/11	1214	47.9 %	4.0 %	4.6 %	7.5 %
2008/09/12	1130	53.7 %	3.7 %	7.1 %	5.7 %
2008/09/13	420	78.8 %	1.2 %	3.3 %	15.0 %
2008/09/14	324	64.5 %	1.9 %	3.4 %	22.5 %
2008/09/15	860	79.0 %	3.8 %	3.3 %	11.9 %

- Measures percentage of incidents where the interval type selected meets the service level (in hours) selected

# SL BY INCIDENTS (REL) REPORT

**Search** [X]

**Filters**

**Interface**

- [Select All]
- No Value
- Interface 1
- Interface 2
- Interface 3
- Interface 4

**Interval**

- (Select All)
- No Value
- Create to Initial Response
- Status Change to Response
- Assign to Response

**Source**

- (Select All)
- No Value
- Management & Config
- CRM Console
- Thin Client
- End-User pages

**Date Grouping\***: Year/Month/Day

**Service Level 1 (in hours)\***: 2

**Service Level 2 (in hours)\***: 5

**Service Level 3 (in hours)\***: 8

**Service Level 4 (in hours)\***: 12

**Service Level 5 (in hours)\***: 24

**Service Level 6 (in hours)\***: 24

**Date Range**: 09/10/2008 12:00 AM to 09/17/2008 12:00 AM

Relative

**Contact** to **Organization**

**Limit and Order**

Limit to [ ] rows  Per Page

Order by: [Date Asc](#)

Save as Defaults | Restore Defaults | Reset | Search | Cancel

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- Interface 4

**Interval**

- Status Change to Response
- Assign to Response
- Create to Final Resolved
- Last Assigned to Final Resolve
- Create to Initial Assigned

**Source**

- [Select All]
- No Value
- Management & Config
- CRM Console
- Thin Client
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**Date Grouping\***  
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**Service Level 1 (in hours)\***  
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**Service Level 6 (in hours)\***  
24

**Date Range**  
09/10/2008 12:00 AM to 09/17/2008 12:00 AM

Relative  Relative

**Contact** to  **Organization** to

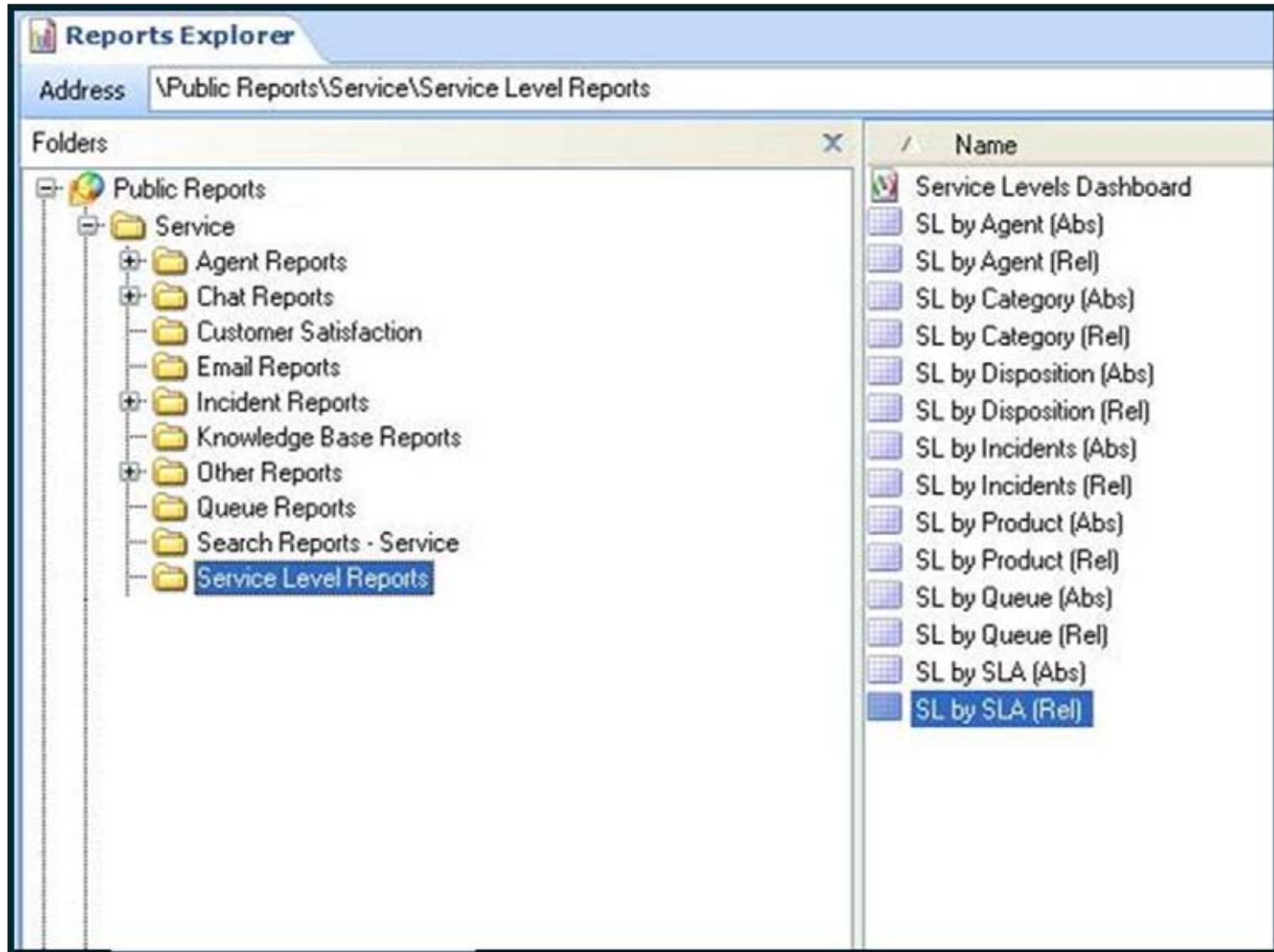
**Limit and Order**

Limit to  rows  Per Page

Order by [Date-Asc](#)

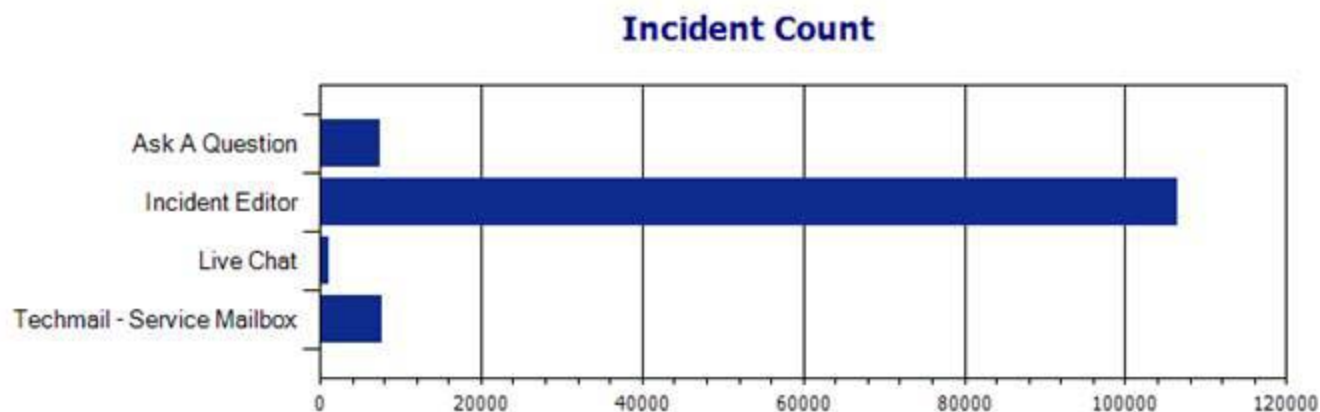
Save as Defaults Restore Defaults Reset Search Cancel

# ADDITIONAL SERVICE LEVEL REPORTS



- Use detailed SL reports to understand and target weaker areas
- Manage overall Staffing levels
- Manage Agent Scheduling to coincide with volume patterns
- Incentives for meeting and beating
- Publicly post weekly, monthly trends

## Incidents Created by Source Report



Source	Interval	Incidents
Ask A Question	2008/09	7593
Incident Editor	2008/09	106417
Live Chat	2008/09	1028
Techmail - Service Mailbox	2008/09	7621
<b>Total</b>		<b>122659</b>

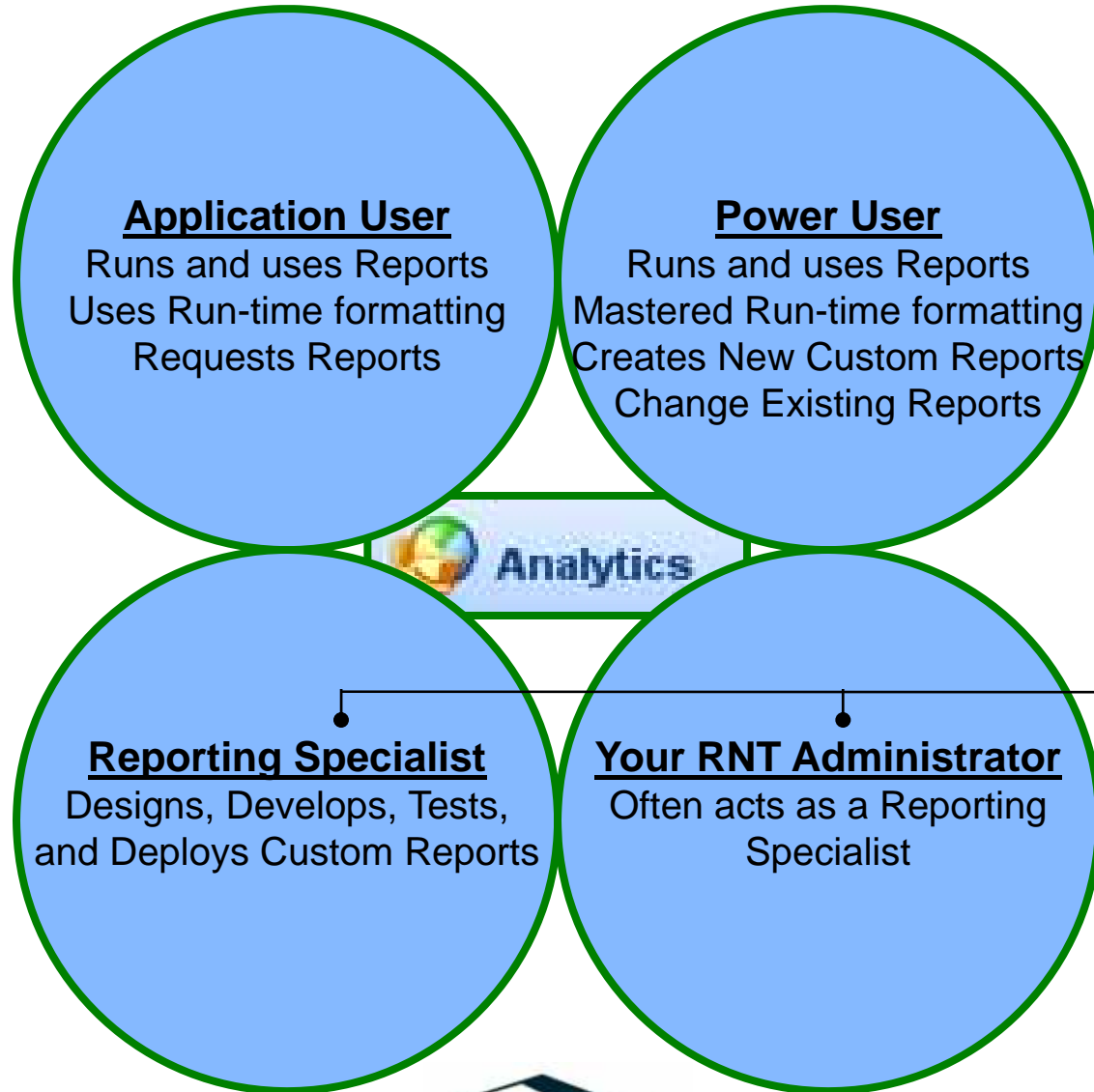
- Define a small number of key questions
  - *How satisfied were you with your overall experience?*
- Define a consistent numerical score for it
- Use RightNow Feedback Surveys to gather the data
- Use Question Responses table for reporting
- Understand that Customer Sat is tightly related to each of the other metrics

- Over 600 Delivered Reports across all applications
- They're outlined and described in the Standard Reports Manual for each release - Library
- Can I get by on just the Delivered Reports?

- 3 Sources for your RightNow Reporting
  - Delivered vanilla reports
  - Custom Reports: from Delivered reports that you've cloned and changed
  - Custom Reports: built from Scratch

# KEY ROLES RELATED TO REPORTING

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Data - where it's stored and how it's organized

Tool - Dev - how to use the tool to clone/create/change/maintain reports

Tool - Runtime - *how to manipulate and format resulting report data*

# DATA DICTIONARY - DIRECT

Common Configuration

Administration Items

- Home
- Application Appearance
- Staff Management
- Customizable Menus
- Rules
- Custom Fields
- System Configuration
- Communication Configuration
- Monetary Configuration
- Database Administration
  - Convert Menu Custom Field
  - Convert Yes/No Custom Field
  - Data Dictionary**
- Contact Upload
- Customer Portal

Incidents Data Dictionary

- Flow Entry Points (flow\_entry\_points)
- Flow Map to State (flow\_map2state)
- Flow Web Pages (flow\_web\_pages)
- Flows (flows)
- Folders (folders)
- Gap Info (gap\_info)
- Gap Report (gap\_report)
- Gap Tree (gap\_tree)
- Help Links (help\_links)
- Hierarchical Menus (hier\_menus)
- Holidays (holidays)
- Incidents to Contacts (inc2contacts)
- Incident Performance (inc\_performance)
- Incidents (incidents)**
- Integration Errors (integration\_errors)
- Interfaces (interfaces)
- Sync Records (isync\_recs)
- Keyword Searches (keyword\_searches)
- Label Menus (label\_menus)
- Labels (labels)
- Languages (languages)
- Layouts (layouts)
- Links (links)
- Locks (locks)
- Marketing Activities (ma\_trans)
- Email Addresses (mail\_addr)
- Email Groups (mail\_groups)
- Email List to Addresses (mail\_list2addr)
- Email Lists (mail\_lists)
- Scheduled Transactional Mailings (mail\_queue)
- Mailboxes (mailboxes)
- Mailing Folders (mailing\_folders)
- Mailing Messages (mailing\_formats)
- Mailing Stats (mailing\_stats)
- Mailings (mailings)
- Map to Meta-Answers (map2meta\_ans)
- Menu Items (menu\_items)
- Meta-Answer Product Links (meta\_ans\_prod\_links)
- Meta-Answer Visibility (meta\_ans\_vis)
- Meta-Answers (meta\_answers)
- Message Types (msg\_types)
- Navigation List Item Folders (nav\_list\_item\_folders)
- Navigation List Items (nav\_list\_items)
- Navigation Set Folders (nav\_set\_folders)
- Navigation Sets (nav\_sets)
- Notes (notes)
- Offer Advisor Contacts (oa\_contacts)

### Table Information - incidents

<b>Table Label</b>	Incidents
<b>Table Description</b>	Contains information on incidents in RightNow Service.
<b>Tbl 1</b>	
<b>Visibility</b>	Service
<b>Custom Fields</b>	Allowed
<b>Primary Key</b>	i_id
<b>Columns</b>	AND/OR (search_and_or) Assigned Account (assgn_acct_id) Banner Account (banner_acct_id) Banner Flag (banner_flag) Banner Text (banner_txt) Category Hierarchy (cat_hierarchy) Category Level 1 (cat_lv1_id) Category Level 2 (cat_lv2_id) Category Level 3 (cat_lv3_id) Category Level 4 (cat_lv4_id) Category Level 5 (cat_lv5_id)

### Column Information - incidents.cat\_hierarchy

<b>Column Label</b>	Category Hierarchy
<b>Column Suffixes</b>	_id, _name, _desc
<b>Column Description</b>	The category that the incident is assigned to, if categories are defined.
<b>Column Type</b>	Menu Field
<b>Data Type</b>	Small Integer
<b>Column Attributes</b>	Nullable, Pseudo, Hierarchy
<b>Analytics Usage</b>	All
<b>Menu Items</b>	74 - General 75 - Information 76 - Help 68 - Account and Billing 69 - Long Distance 70 - Manage My Account Online 71 - Troubleshooting 77 - Call Quality 78 - Dial Tone 79 - Disconnected

# DATA DICTIONARY - FROM ANALYTICS

The screenshot displays the RightNow CRM Data Dictionary interface. At the top, a 'New Report' window shows a 'Grid Report' level. Below this, a 'Docked Filters' area contains the instruction: 'Drop Fields from the Data Dictionary or Columns from the Design Surface'. A grid below shows a report with columns 'Reference #' and 'Status', containing four rows of data.

The 'Data Dictionary' pane on the left lists various data categories. 'Incidents (incidents)' is highlighted with a red checkmark. The 'Fields' list on the right includes: Purchase Date (c\$purchase\_date), Queue (queue\_id), Reference # (ref\_no), Repair Number (c\$repair\_number), Resolution Interval (sla\_rsh\_delta), Response Interval (sla\_resp\_delta), Response Requirements ID (rr\_id), Return Tracking # (c\$ret\_track\_number), RMA Number (c\$rma\_number), Rule State (rule\_state), Scheduled Call Time (c\$scheduled\_call\_time), Serial Number (c\$serial\_number), Session ID (sessionid), Severity (severity\_id), SLA Instance ID (slai\_id), SMIME Type (smime\_type), and Source (source\_vl1).

A 'Column Information - incidents.status\_id' popup is visible on the right, providing details for the 'Status' column. It includes: Column Label (Status), Column Suffixes (id, name), Column Description (The status assigned to the incident (for example, Solved, Unr...)), Column Type (Menu Field), Data Type (Small Integer), Column Attributes (Not Nullable), Analytics Usage (All), and Menu Items (2 - Solved, 1 - Unresolved, 0 - Locked, 3 - Waiting). A 'View Data Definition' button is highlighted over the 'Status (status\_id)' field in the Fields list.

Reference #	Status
Reference #1	Status1
Reference #2	Status2
Reference #3	Status3
Reference #4	Status4

**Column Information - incidents.status\_id**

Column Label: Status  
Column Suffixes: id, name  
Column Description: The status assigned to the incident (for example, Solved, Unr...  
Column Type: Menu Field  
Data Type: Small Integer  
Column Attributes: Not Nullable  
Analytics Usage: All  
Menu Items: 2 - Solved, 1 - Unresolved, 0 - Locked, 3 - Waiting  
Joins: statuses.status\_id where statuses.ID = 1

Fields:

- Status (status\_id)
- St...
- Su...
- Survey Score (last\_survey\_score)
- Tracking Number (c\$track\_number)
- Uncommitted Response (resp\_sav)
- Warranty (c\$warranty)
- Weight (match\_wt)

- Accounts
- Contacts
- Incidents
- Answers
- Threads
- Incident Performance
- Transactions
- User Transactions

# KEY TABLES – INCIDENT-CENTRIC

## Contacts

Row for each  
Customer;  
Name, Email  
Address...

## \*\*Incidents\*\*

Row for each  
Incident;  
Refno, Assigned to  
Subject,  
Status, Prod/Cat

## Staff Accounts

Row for each user;  
Name, Group,  
Profile...

## Threads

Row for each  
thread entry;  
Notes, responses,  
Customer entries...

## Inc Performance \*

Amount of time –  
By Interval Type:  
Created to Response  
Assigned to Response  
Response to Resolved

## Transactions

Action-based;  
Creates,  
Assignments,  
Responses,  
Forwards

## User Transactions

Amount of time-  
Logged in,  
Performing Edits,  
Viewing

\* Cached  
\* Relative Time

- Incident Performance Table tracks how long it takes in both absolute *and relative time* for Incidents to go through these intervals:

- |                                    |   |
|------------------------------------|---|
| 1 - Create to Initial Response     | 10 - Queued to De-queued                        |
| 2 - Status Change to Response      | 11 - Queued to Initial Assigned                 |
| 3 - Assign to Response             | 12 - Queued to Initial Response                 |
| 4 - Create to Final Resolved       | 13 - Queued to Initial Resolved                 |
| 5 - Last Assigned to Final Resolve | 14 - Backlog                                    |
| 6 - Create to Initial Assigned     | 15 - Incident Edit                              |
| 7 - Create to Initial Resolved     | 16 - Servicing                                  |
| 8 - Assigned to Reassigned         | 17 - Initial Response to Initial Resolved       |
| 9 - Status Change to Reassigned    | 18 - Queue Initial Response to Initial Resolved |
|                                    | 19 - Final Waiting to Final Resolved            |

# KEY TABLES – ANSWER-CENTRIC

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## Contacts

Row for each  
Customer;  
Name, Email  
Address...

## \*\*Answers\*\*

Row for each  
Answer;  
Answer ID, Summary,  
Assigned to  
Answer Content  
Status

## Staff Accounts

Row for each user;  
Name, Group,  
Profile...

## Clicktrack

Which Contacts  
have viewed  
which Answers

## Answer Stats

Answer Hits and  
Ratings

## Transactions

Action-based;  
Creates,  
Assignments,  
Edits

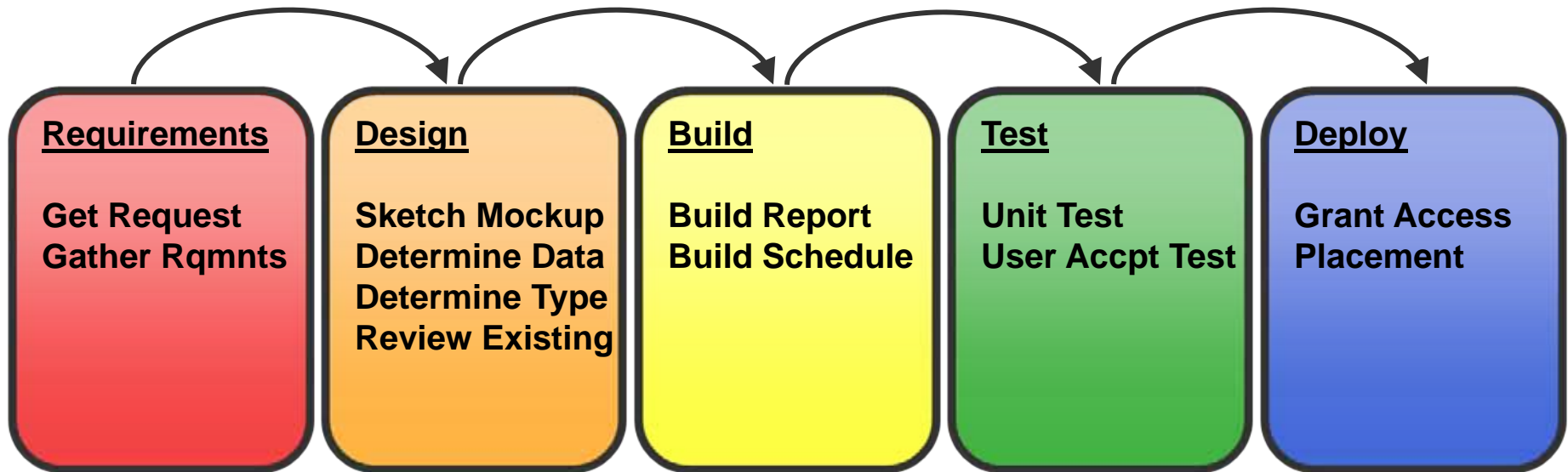
## User Transactions

Amount of time-  
Logged in,  
Performing Edits,  
Viewing

# THE CUSTOM REPORTING LIFECYCLE



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# MOCK-UP REQUIREMENTS

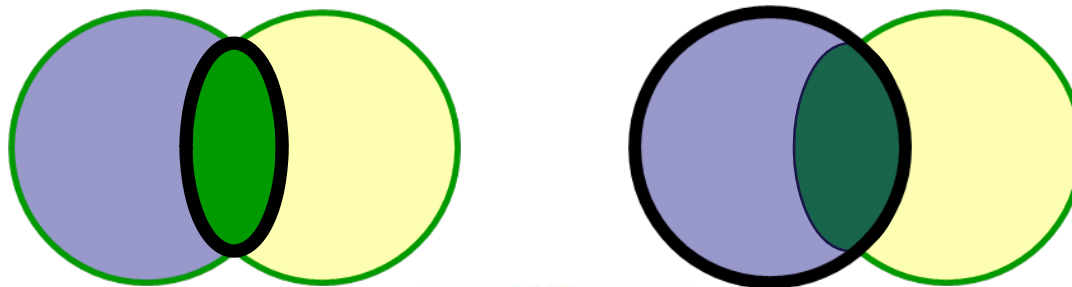


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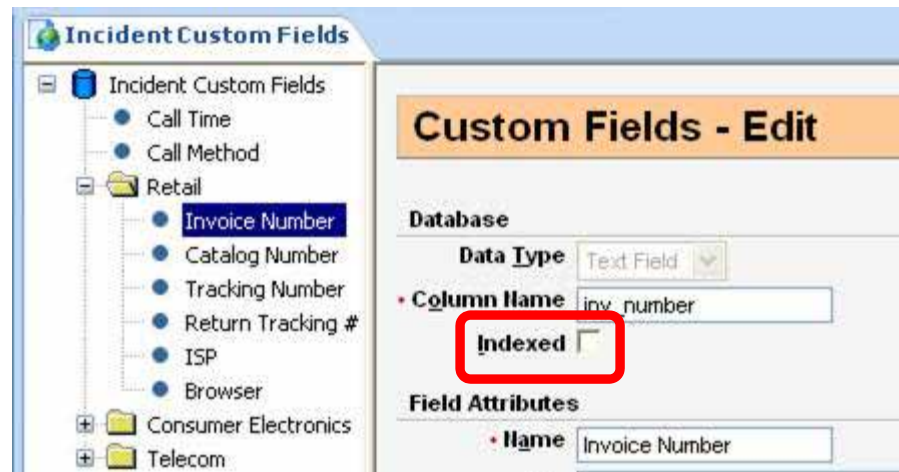
## Create a Mock-up of the report

	A	B	C	D	E	F	G
1							
2		<b>Weekly Agent Productivity</b>				<b>Filters:</b>	
3						Assigned Group	
4						Date Range – Created	
5		Agent	Incidents Solved	Avg Response Time		Status - Solved	
6							
7		Bob	250	5hrs32min			
8		Mary	175	6hrs11min			
9		Tom	225	4hrs18min			
10		Jill	325	5hrs48min			
11							
12		Total	975				
13		Average	269	5hrs12min			
14							
15							
16		<u>RefNum</u>	<u>Subject</u>	<u>Customer Name</u>	<u>Date Created</u>		
17		070827-00098	Is it possible for	John Jones	27-Aug		
18		070827-00099	How can my orde	Sue Miller	15-Aug		
19		more listing...					
20							
21		Record Count: 325					
22							

- Start simple and easy, one table, a few output fields, and a key filter
- Preview, tweak, Preview, repeat
- Add formatting, subtotals, charts, extra components after you get the core report working
- Understand join types and ensure you have them set correctly: Inner vs Outer




- If the data will result in the same set, use Inner Joins instead of Outer Joins
- Use as few tables as possible
- Apply Indexes for frequently reported upon custom fields:

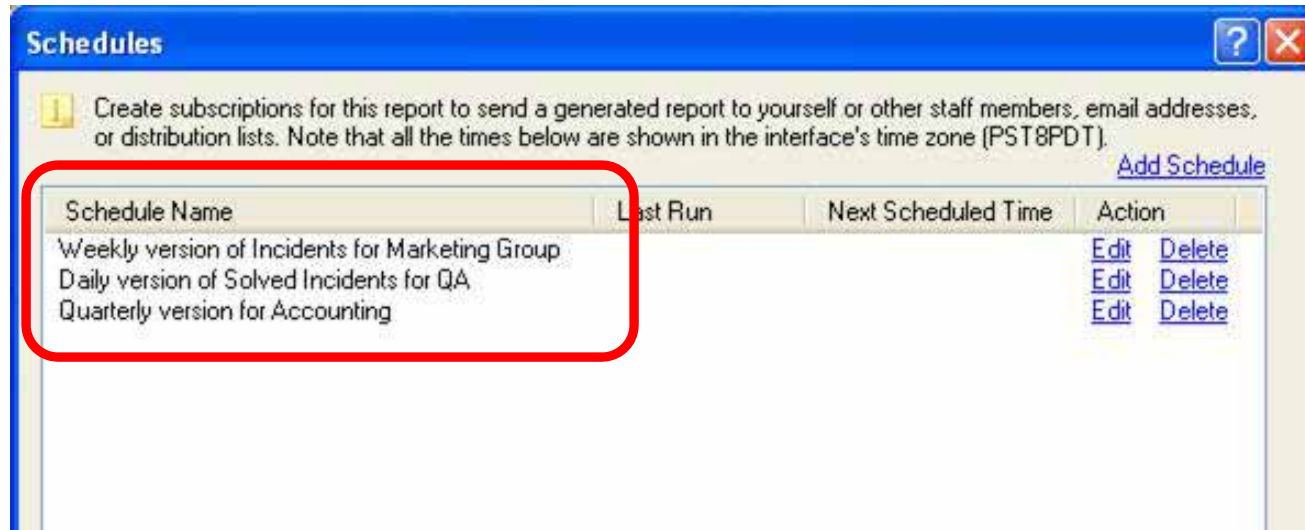


- When you have a choice between making a filter 'fixed' or 'selectable', make it fixed
- There are 3 Levels of Filters: Report, Node, and Group. Set filters at the highest level possible.
- Set default values for selectable filters
- When counting records with a function, use the syntax - count(1), rather than count(\*) or count (incidents.refno)

# BUILD THE SCHEDULE



- Schedules are optional 
- Take advantage of the ability to apply multiple schedules to the same report:



# 8 KEY FEATURES TO KNOW ABOUT AND LEARN

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- Cross-Tab Reports
- Recursive Drilldown
- Group Date
- Dashboards
- Docked Filters
- In-Line Editing
- Reports about Reports
- Exporting report definitions

# 8 KEY RUN-TIME FEATURES FOR USERS

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- Sorting
- Rollups
- Slicing
- Auto-Filter
- Filtering and Row Limits
- Displaying Search Criteria
- Exporting results
- Publishing

# 8 KEY RESOURCES FOR BECOMING A REPORTING STAR

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## Resource:

## Location:

Analytics Manual

Customer Community/Library

Standard Reports

Customer Community/Library

Data Dictionary

Common Config/DB Admin/Data Dictionary

Knowledgebase

Customer Community/Support

Customer Forum

Customer Community/Forum

Online Learning Ctr

Customer Community/Education & Training

Classroom Training

Customer Community/Education & Training

Time with the Tool

*You and your computer*

# ADDITIONAL RESOURCES FOR DEEPER HELP

- Onsite custom training - your data, your environment, your requirements
- Outsourced Administration (OSA) support, your OSA Analyst can build reports for you
- Offsite custom report development through RightNow's Reporting Center of Excellence
- Ask the Experts session during this conference

- Questions
- Comments
- Additional Best Practice Ideas to share