

# Dashboards: No Longer a Luxury

## Hot Topic Database -- Organizations are deploying dashboards across departments to hold employees responsible for customer metrics.

One positive of the current economic climate is that many organizations have become more accountable for dollars spent and customers retained than in the past. Executives and IT are no longer the only ones in an organization with their eyes on the corporate dial. Companies are deploying specialized dashboards across their organizations—from sales and marketing to product development and human resources to customer service—as a way to deliver benchmark and ROI data.

"[Dashboards] were something that used to be a 'nice to have,'" says Erin Shy, a director within Sage North America's Nonprofit Solutions business unit. "It's no longer a luxury to have these business intelligence tools. From the executives' perspective, they need instant analysis...without having to rely on the typical reports of the past."

According to SAS CMO Jim Davis, many executives today are asking for customer-focused metrics in their dashboards, rather than just sales figures and information technology updates. He says companies are putting the controls in place across the organization to monitor everything from market risks to first-call resolution. "This economy has educated businesses on the importance of satisfaction," he says.

The technology exists for companies to take a more detailed approach to their data, says Rick Reilly, director of quality assurance at LRA Worldwide. "They're getting down to the nitty gritty," he says.

Reilly says a shipping company, for example, may integrate customer satisfaction survey data with internal metrics like the length of time to ship or how long a customer waited for a delivery. With this level of data and context, organizations can get a more complete picture of problems to fix them in real time. "The real key is to be able to combine external data with internal metrics, such as hold times in the call center, and be able to link that back to specific touchpoints," he says, "and, at the end of the day, link that back to a specific customer."

Reilly sees more organizations focusing on capability-specific dashboards, which require an integrated, cross-departmental approach. These companies extend dashboards to customer-focused departments like marketing and service to monitor key performance indicators and sales figures to provide departmental or even individual ownership of and accountability for the company's results. Reilly admits, however, that such forward-thinking approaches usually occur

within companies that have the culture to see them succeed. In many organizations cultural barriers and data silos still prohibit such an integrated strategy from working.

This view, however, may be changing. "In an economy such as this one, a lot of people realize that being able to execute a consistent and high-quality customer experience becomes that much more necessary because people need to become that much more discretionary with spending," Reilly says.

### **Chase first-call resolution**

Chase Card Services, with the help of Enkata, deployed integrated dashboards to the desktops of 6,000 customer service reps to help them monitor first-call resolution.

Deb Walden, executive vice president of customer care at Chase Card Services, says it's important for the agents to see the key drivers of customer satisfaction and to resolve customers' issues. "What's important in any environment when managing people is having clear goals and accountability, and [that] what you're measuring them on has integrity," she says.

Chase Card Services tried to measure first-call resolution in the past, but management lacked the tools to specify what it needed for the metric to take hold. The reps knew they were creating repeat calls, but didn't know how to change that. They needed to see what types of inquiries, as well as which of their responses, were generating the repeat calls. "We didn't have the information to share with them," Walden explains.

Walden first rolled out the dashboards in the company's Orlando, FL, contact center, then to its nine other centers. Now customer service reps can see their performance on every single call and Chase Card Services holds them accountable for customer satisfaction in their monthly performance reviews. Managers integrate the first-call resolution results from the dashboards into each agent's individual performance scorecard. The process allows the agents' supervisor or manager to work with them and coach them on specific call types.

Dashboards have allowed Chase Card Services to develop reports that help management capture data to drive results. The company has increased first-call resolution since deploying the dashboards. "Employees first and foremost want to do a good job. As leaders in the organization, it's our responsibility to provide them with the tools and knowledge to do just that."