1.0 AppExchange Service and Support Dashboards

Whether you're a call center, contact center, IT Helpdesk or telesales group you rely on metrics. Call times, hold times, handle times and resolution times are summed, averaged and factored. Performance and success is defined by these metrics and compensation is often based on these metrics.

This means if you're using salesforce.com Service and Support to track cases, then you should be interested in dashboards that will help you analyze the performance in your company. Dashboards can provide a visual representation of your realtime operations, agent workload and productivity, critical customer information and key performance indicators.

2.0 What you get

This document is meant to outline the expectations you should have for what you will be receiving with the AppExchange Service and Support dashboards offering. You should understand what it is and what it is not.

First and foremost, this offering is intended to provide you with some food for thought. A starting point for the customizations you will need in order to make these dashboards work for your organization. Due to the nature of the salesforce.com application it is expected that you have customized your cases to meet your specific business requirements. You may have modified picklists, added fields, integrated it to other systems or made any number of other changes. You might have even extended your system with one of the many other support related offerings on the Appexchange such as Service Entitlements or Advanced Call Scripting. In order to make this offering relevant to ALL salesforce.com customers we have restricted ourselves to ONLY using e standard out-of-the-box fields. You will want to take note of this as you decide what customizations you may want to make before rolling these out in your organization.

Take a look at each dashboard. They are given descriptive titles and headers. Also, please take the time to read the footnotes for each Dashboard component. They will not only describe the purpose of the components but will also offer some advice about how they might be customized to meet your organizations specific needs.

2.1 Salesforce Service & Support - Customer Information

A dashboard with components to track customer related metrics. It is important to know which customers are using support and how often. By reviewing this data it should become easier to identify who is using your service, how often and for what. Most of the components on this page have been set to return a maximum of 10 values. This is done top prevent the page from

becoming too long on their initial load into your environment. You can reset this value if you choose.
Components:
New Cases Opened by Account MTD
New Cases Opened by Account-Channel YTD
All Open Cases by Account
Total closed cases by Account
Time spent by Account YTD
Escalated Case by Account, MTD
Escalated Case by Account, YTD
Open Case per Account, YTD (weekly trending)
Average Case Age by Account
Accounts to Watch – Open High Priority Cases
High Priority Cases Opened MTD
High Priority Cases Opened YTD

2.2 Salesforce Service & Support – KPI's

This is a collection of dashboard components to monitor common Key Performance Indicators. You might be looking to reduce call handle times or to get your customers to use lower cost channels. You might be looking to increase your first call resolution percentages. This dashboard takes a look at some of the more common KPI's that salesforce.com has seen across many successful implementations.

Components:
Opened cases MTD by Channel
Opened cases YTD by Channel
Average Stage Duration in hrs
Solution Status
Case Volume by Channel
Cases created by Type
Cases Closed on the Self Service Portal, monthly trending
New Users created for the Self Service Portal by account
# of Cases by Month by Reason
Cases Closed in less than 24 hrs
Open Cases by Stage
Open Cases by Queue
Open Cases by Priority
Open Cases by Reason
# of Cases by Month by Type

2.3 Salesforce Service & Support – Rep/Agent Performance

This dashboard has components that track your call center's agent/representative performance. Track the effectiveness of your staff, their workload and quickly identify areas of concern. You can clone this dashboard and edit the reports to add filters to regionalize this view if you have a distributed call center environment.

Components:
Current Workload, Open Cases per Rep

Open Cases per Rep, by Priority
Age of Open Cases by Rep
Average time to close by Rep (in hrs), MTD
Closed Cases per Rep, MTD
Closed Cases per Rep, YTD
Time Spent by Rep on Closed Cases (in hrs), MTD
Time Spent by Rep on Closed Cases (in hrs), YTD
Average Handle Time per Rep (in hrs)
Open Cases per Rep by Status
Open Cases per Rep by Channel, MTD
Open Cases per Rep by Channel, YTD
Open Cases per Rep by Type, MTD

2.4 Salesforce Service & Support – Executive Overview

The Executive Overview dashboard attempts to take the most important components from the other three dashboards on to a single dashboard for a quick at-a-glance view. As with all of the other dashboards, you may like what you see but want to change it to reflect what are the most important metrics at your organization and to meet the needs of your key executives

3.0 Summary

Good SSS Dashboards can have great returns; it can give you an overall view of the performance of your operations from multiple perspectives. As you gain this visibility, it will help you prioritize as a company what areas you are doing well in, what areas you are falling down in and where you can focus your efforts to have the greatest impact. Whether you are just rolling out salesforce.com in your company or have been using it for an extended period of time, this offering will help you gain insight into your operations and help you make decisions based on real quantifiable metrics. Better information should mean better business decisions.

A best practice for building and rolling out these dashboards is to load them into your organization and define a group who will review them. Compare them to what you have already defined as the core metrics in your organization and identify any gaps. Then expand these dashboards to include what you have already defined as your core metrics and to reflect any additional information you have gathered through the customization of your system. Last, determine if you need to regionalize the views. If so, then clone the appropriate dashboards, edit the report filters and create new dashboards with the appropriate running user.

Once you do customize these dashboards please remember to edit the footnotes to reflect how you have redefined the components.

For more ideas on best practices to improve your call center operations or any other area of your use of salesforce.com visit http://success.salesforce.com/.