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Ensuring Efficient and Practical Internal Customer Support Reporting for Polar Electro Oy's Customer Support Organization

**Ensuring Efficient and Practical Internal Customer Support Reporting for
Polar Electro Oy's Customer Support Organization**

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ABSTRACT

Oulu University of Applied Sciences
Bachelor of Business Administration, International Business

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Polar Electro Oy has relatively recently rebuilt most of their key customer support tools and operations around the widely used customer relationship management software, Zendesk. In the rebuilding process the reporting tools were switched over to the new platform for operations with mainly all the existing previously used metrics and reporting layouts ported over as close to the previously used ones as possible. The previous reporting was perceived as suitable and answering to all the requirements set for reporting. Over time, slight additions have been made to these metrics when deemed necessary but besides these, the metrics and reporting layouts have been unchanged.

The previously mentioned metrics and reporting layouts from the old software as well as from the new one, have not been validated or verified in any way. Now, it has been deemed necessary to conduct a current state analysis of the reporting to achieve several different benefits such as to pinpoint possible issues or shortcomings in the reported data, as well as to ensure currently reported data is useful and available for all parties who may benefit from it. As the current state analysis will be based on literature in the field as well as my researched establishment of what consists of a good report and what metrics to include, this will provide a baseline and a point for comparison from which the current state of reporting can be improved. Qualitative research approach will be taken, and the aforementioned data will be supplemented by conducting an organization wide interview targeted to include users with different levels of requirements for reported data, from Support agent to Managing Director, Nordics.

Keywords: Zendesk, Reporting, Customer Support, Management

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1 INTRODUCTION

Polar Electro Oy, referred to as Polar or Client company in the future, has relatively recently rebuilt most of their key customer support tools and operations around the widely used customer relationship management software, Zendesk. In the rebuilding process the reporting tools were switched over to the new platform for operations with mainly all the existing previously used metrics and reporting layouts ported over as close to the previously used ones as possible. The previous reporting was perceived as suitable and answering to all the requirements set for reporting. Over time, slight additions have been made to these metrics when deemed necessary but besides these, the metrics and reporting layouts have been unchanged. (Lindroos, discussion 3.9.2021)

The previously mentioned metrics and reporting layouts from the old software as well as from the new one, have not been validated or verified in any way. Now, it has been deemed necessary to conduct a current state analysis of the reporting to achieve several different benefits such as to pinpoint possible issues or shortcomings in the reported data, as well as to ensure currently reported data is useful and available for all parties who may benefit from it. As the current state analysis will be based on literature in the field as well as my researched establishment of what consists of a good report and what metrics to include, this will provide a baseline and a point for comparison from which the current state of reporting can be improved. The current state analysis will also include if the reach of the current report is satisfying the needs of all desired users. Any discrepancies between the aforementioned researched ideal reporting metrics, layouts and possible lack of answers to user needs will be highlighted and analysed over at the conclusion and development part of paper. We will be observing reporting from the business standpoint as the technical solution for producing reporting is up to date and suitable for the purposes set for it.

The writer is currently employed full time for the Client company in the Customer Care department as a Field Application Specialist. The thesis topic has been given from the Client company, and the findings from this thesis are aimed to be utilized in the Client company. The writer has worked in the field of customer support for around three years in different companies, with previous titles being Junior Customer Support Agent and Customer Experience Specialist. All positions have involved utilization of reported data and some limited experience with producing reports can also be found.

2 DEFINING REPORTING

To provide an accurate current state analysis and for facilitating the possibility for us to highlight possible issues with the current state of reporting used in Polar, we will have to establish what is reporting and if possible, research and evaluate desirable metrics that should be included in reporting.

2.1 Defining reporting

According to Stupkevich, Sweenor and Swiderek (2019, Choosing Your Data Analytics) “The basis for critical business decisions – what the business decision makers and the management team must have – are insights. Business managers cannot make these decisions in a vacuum. There is only one true source of insights: data.”

The data a modern company generates is vast, and the levels of utilization for it can vary from company to company. Business intelligence is one of such utilizations for data and as defined by Nedim and Clare (2016, 3) as an umbrella term, including “the strategies, processes, applications, data, products, technologies and technical architectures used to support the collection, analysis, presentation and dissemination of business information.” The previous source also establishes: “The reporting layer is one of the core concepts of underlying business intelligence. It provides users with meaningful operational data” (Nedim & Clare 2016, 3).

This highlights the importance of the reporting, for business decision making as well as general day-to-day operations and as Stupkevich, Sweenor and Swiderek (2019, Present: Reporting) state in their report, the key benefit of reporting is to provide information for users of the reported data to answer a particular set of questions. Through the interviews conducted, we can conclude whether or not the reporting delivers this key benefit. In the case of the client company, the single most important key performance indicator for their use and for communicating the state of customer care to internal stakeholders, such as the Chief Executive Officer, is the Net Promoter Score, commonly abbreviated as NPS. “Net Promoter Score is a metric that was first developed in 1993 by Fred Reichheld and later adopted in 2003 by Bain & Company and Satmetrix as a way to predict customer purchase and referral behaviour” (Reichheld 2003, cited 14.11.2021). NPS has also been

praised for providing feedback from operations quickly while having better customer engagement rates, providing valuable feedback to agents, as well as management (ibid.).

As is the usual utilization of NPS, the Client company employs it in the same aspect, sending a survey after support events asking the customers to rate how likely they are to recommend Polar to an acquaintance. The survey can be answered on a scale of 0-10, with 0-6 answers grouped as detractors, 6-8 answers being grouped as neutrals, and 9-10's being promoters. While NPS has also faced critique more recently due to the being too broad and losing potentially useful information, it is still considered the most valuable key performance indicator for the client company (Stahlkopf 2019, cited 14.11.2021; Lindroos, discussion 16.11.2021). This essentially cements the NPS as the foundation upon which the reporting is built on, as the importance of the key performance indicator for the whole organization is remarkable, many of the reporting metrics are directly aimed to track and improve NPS, on all levels of reporting.

2.2 Establishing Reporting Metrics & Examples from the Industry

As the various sources used in this section establish, 'general' contact centre reporting is important to ensure effective customer service operations, which in turn, ensures that the organization meets their desired levels of service and customer satisfaction as best as possible.

As the organizations vary in size and purposes, so does the utilization of business intelligence and reporting. Based on various sources from the internet we can establish some metrics that are highlighted through different articles and customer support software pages. These are gathered in the following table. As Zendesk is the client company's current service provider, their listed 7 metrics to track are the basis (Zendesk 2017, cited 25.10.2021). In case the articles or support software pages use calls instead of emails, they will be replaced by the corresponding metric used in measuring the email channel for the case of this table.

Table 1: Commonly used reporting metrics

Zendesk Blog	Issue by resolution area	Reply Time metrics	Resolution time metrics	Resolution effort metrics	Ticket reopen metrics	Next issue avoidance
Timedoctor	x	x	x	x		

startupguys	x	x	x	x		
RingCentral	x	x	x	x	x	x
Amazon Connect		x	x	x		
LeadDesk		x	x	x	x	
callcentre- helper	x	x	x	x		

(Zendesk 2017, cited 25.10.2021; Lauren 2021, cited 25.10.2021; startupguys 2020, cited 25.10.2021; RingCentral 2021, cited 25.10.2021; Amazon 2021, cited 25.10.2021; LeadDesk 2019, cited 25.10.2021; Colin 2020 cited 25.10.2021)

The inclusion of the metric in their suggested reporting metrics is marked by **x** in the table. Issues by resolution area indicate tracking or categorizing issues based on areas which can be specific products or services. This is used to locate or highlight possible issues with a certain product or service. Reply time metrics indicate time to answer a request, be it an email or a call. Resolution time metrics indicate the total time it takes to resolve an issue from first contact to full closure. In case of client company, for example, a standard email contact is considered to be resolved when neither party sends an email for a week. Ticket reopen metrics are indicated by recontacts, next issue avoidance is indicated by following up on possible causes from recontacts or resolved issues, if tracked.

While the premise for this table is not to compare different sites, we can establish that most widely accepted metrics to track are reply time, resolution time and resolution effort. Issue by resolution area is relatively common, while next issue avoidance is quite rare. The table can also be utilized for comparison with existing Client company's reporting to establish the necessity of reported metrics and highlight the metrics that can be defined to be the most important to deliver.

3 DESCRIPTION OF TASK AND RESEARCH

Under this section the formulated and defined research questions will be presented, including the methodology used to formulate the research questions. As this thesis is based on a method development task, some basics will also be highlighted here to provide practical information on why the specified research questions were chosen.

3.1 Research questions

The research questions were formulated during a discussion with M. Lindroos on 3.9.2021 who represents the thesis' client, Polar Electro Oy, specifically Global Customer Care, referred to as Client company or Polar in the future. In the discussion in question the estimated current state of reporting, current uses for reporting and targets for the reported data were discussed extensively as well. Lindroos and I agreed upon formulating the research questions based on use-cases due to the versatile corporate positions and needs of the users of data.

The use-case construct was invented by Ivar Jacobson, as a result of a need to describe complete sequences of actions in complex telecommunications systems. Another book, *The Object Advantage* (Jacobson, Ericsson, and Jacobson 1994), showed how use cases could be used also for modelling businesses. (Övergaard, G. & Palmkvist, K. 2004, *History of Use Cases*.)

We have chosen to formulate the research questions based on use cases due to the relatively complicated and versatile requirements set for the reporting and reported data.

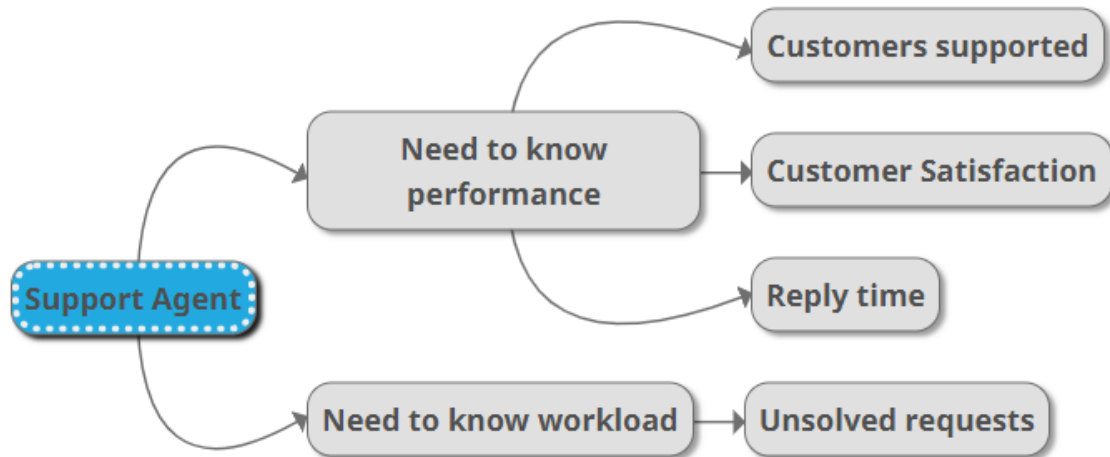


Figure 1. A Support Agent's use case for reported data

Going off the use-cases, we concluded that the requirements set for reporting by the client are the following: The reporting needs to have a user, see **Support Agent** in Figure 1. The reporting needs to be effective and impactful, see **Need to know ...** in Figure 1. The reported data needs to be in a readable and understandable format, as the support agent has the need to know, but if he does not understand, the reported data is useless. In practice, the reported data needs to be concise and readable enough so that the user for the data can use it to improve their work or methodology, and if necessary, make all levels of decisions based upon it. As two of the three research questions are subjective, it will have to be taken into account in the entirety of this thesis. Having established the requirements set for the reporting, the research questions can be defined. The defined research questions shall be: 1. Is the currently reported data used and if yes, how widely? 2. If the reported data is used, how effectively and impactfully? 3. Is the reported data readable, and if yes, how understandable the format is?

3.2 Research methodology

The research approach taken shall be inductive as we are conducting all the observations first. The conclusions, as well as the client's current state analysis, will be based on the researched and analysed data from mainly primary sources, such as discussions with the Client's representative and the organization wide interview. Secondary data will be used to establish the definition of reporting, the importance of reporting and definition of possible industry wide standard for comparison

with the current reporting metrics. Secondary data is also required to support the choices in research methodology as well as the formulation of findings and conclusions. Due to the strong working life connection of the thesis, and the specific needs of the Client company, practical and empirical knowledge shall also be utilized, where possible.

Based on the research questions, the research methodology best suited for providing us with the most concise answers to our research questions can be defined. Seeing as all research and the results of thereof are to be conducted and applied in the client company as per the clients will and requests; qualitative research shall net the most accurate and applicable results for the clients relatively unique organizational operations. Usage of well-established research methodology is also of assistance for the general applicability of the results of this thesis. As established by Eden, Bernhard and Verbeke (2020, 235.) "There is ample evidence that the legitimacy and usefulness of qualitative research are no longer questioned by most prominent scholars in administrative and organizational science."

Qualitative research, as illustrated and defined by Tracy (2020, 2-4.) is the systematic analysis of natural events and actions and such research can include methods covering interviews, textual analysis and participant observation, usually conducted in the field.

3.3 Organization wide interview

The interviews will be carried out partly via Microsoft Teams; however, face-to-face, one-on-one interviews are preferred, when possible. The interviewees are presented only by their job titles, both to highlight the organizational position of the interviewee, as well as ensure unified presentation of the interview results and maintain anonymity, as courtesy to the interviewees. The only exception to this is M. Lindroos, as he is the representative of the Client. Interview audio will be recorded, with the permission of the interviewee, with an external recorder in the case of face-to-face interviews and via software in interviews conducted via Microsoft Teams. Due to the possibility of the interviews containing confidential information, the interview recordings will remain in the possession of the author until the thesis has been graded. All interviewees have been informed of the purpose of the interview being data gathering for the development task of formulating the Client's current state analysis, as well as the presentation of the current state analysis in this thesis. The interviewees will be encouraged to share anything related to the questions that comes to their mind,

and the interview is aimed to have a relatively relaxed atmosphere. The interviews were drafted with a 30-minute timeslot for each interviewee.

The following questions have been formulated for the purpose of providing as quantifiable answers as possible, while still providing qualitative data through the nature of the questions being related to the individual's field-of-expertise. The themes of the questions correlate strongly with the defined research questions and metrics set for reporting. Answers are able to be quantified for all questions but the second (2.) by aggregating the answer to a yes or no. However, to avoid oversimplifying the results of the interview, they shall be applied qualitatively to further benefit the formulation of a current state analysis.

Table 2: Interview Questions

1) Do you currently use any of the data Care reports? If yes, which data you use?
2) How do you utilize the reported Care data in your daily work?
3) Does the reported Care data affect your daily work or area of expertise?
4) Do you feel the Care reported data is useful?
5) Do you feel the Care data reporting format is clear and suitable for your use?
6) Do you find anything lacking from the data?

Interviews will be carried out as soon as possible, and to form a cohesive whole of the users of reported data, it has been agreed with the Client that we shall aim to interview users who use the different report. More information about the users for each report will be included in chapter: **4 Current State and Operational Environment**. Plans have been made to include, in the order of corporate seniority, at least a Customer Support Agent, Lead Customer Support Specialist, Customer Support Manager, Director of Global Customer Care (M. Lindroos) and the Managing Director of Nordics for example. Interviewees holding these positions have been selected to facilitate data gathering from all of the levels the reported data is either utilized at or could be utilized at.

4 CURRENT STATE AND OPERATIONAL ENVIRONMENT

In the following chapter, the client company's current operational environment will be described shortly. We will also provide pictures of the current reporting metrics and solutions in use in the client company, as well as explain some of the reasoning behind including these metrics, from the client company's point-of-view.

4.1 Client's Utilization of Reporting

The client utilizes reporting to a fairly standard extent; deliver business intelligence to those who may benefit from it. In practice and in day-to-day operations, reporting aims to support individual customer support agents in improving their work or methodology, as well as for tracking various different metrics and to provide the tracked information for the different levels of customer support management through a central hub: Zendesk Explore, shown in Figure 2. Customer support management then delivers this data as requested to other operations if personnel without the access to the central hub require the data. This usually takes the form of an ad-hoc report as the request can be quite specific and there are no wishes to include more data than necessary, usually from both parties. Management's use of the data can vary from providing glimpses into the overall state of support operations and tracking causalities, be they positive or negative, marketing management or research, various different projects, to ad hoc reports for research and development about possible issues with features. (Lindroos, discussion 3.9.2021) Various other insights can be gained from the reported data as well to support different business decisions, as is usually the case and aim with reporting. As previously mentioned, the Net Promoter Score is the most important key performance indicator for the client company. Most of the metrics in use support the NPS and are used for detecting causalities between factors affecting support operations and NPS.

It should be noted that Polar is an international company. This has generated the need to offer customer support to customers in their native language, where the market size permits. While there are quite a few of different locations and languages in play, the reporting aims to offer a clear and easily comparable view of, and for, all the different support teams working around the globe. For this thesis and for the scope of the current state analysis, the client has defined that three main support locations will be enough to provide a cohesive whole capable of representing all of the teams worldwide. These three locations in question are the Headquarters (HQ) care team located in Finland, the Polar European Customer Care (PECC), a location in Greece which houses multiple external teams and finally the support team located in the United States of America.

4.2 Common Reports and Metrics

It should be noted, while pictures of the reports from Zendesk Explore are included, the pictures have been edited to omit any information deemed confidential, mainly anything that has to do with the operational capacity of the client. In terms of presentation and metrics, the pictures are unaltered. As mentioned in the previous chapter, all of the gathered data from the customer support operations comes into Zendesk Explore, the centralized hub for business intelligence. Depending on the position of the user, most often any user of the reported data can access the data of interest directly through the Explore. The reported data has been roughly categorized and separate spaces have been created for different levels of user needs. This is due to the fact that the reporting includes metrics that might not be suitable or beneficial information for some or may be misinterpreted (Lindroos, discussion 3.9.2021). Common reports refer to those that most users can access and benefit from, mainly containing data from individuals' day-to-day operations.

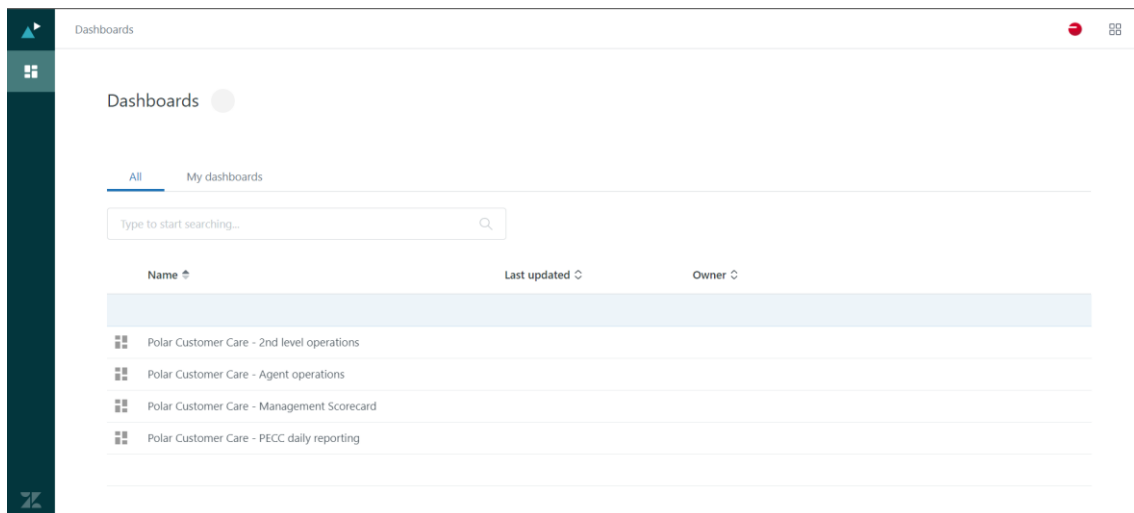


Figure 2. Zendesk Explore, hub page. (Captured 29.10.2021)

Technically, data from operations are stored indefinitely in Explore, at least currently. Some metrics have a built-in date range, vast majority of them have however been left without any set date ranges, so that the user can specify their desired date range (Lindroos, discussion 3.9.2021). This is available through “Time” selector in most reports and configurable with a few clicks. This allows the user to choose for example, a year-to-date (YTD) window for displayed data and the report displays selected data from the timeframe. A more advance option is also available for manually specifying the date ranges. See appendices 2 and 3, “Time” and “Time-Advanced” for the visual aspect of the date range selectors.

For the support agents who make up the majority of the operational capability of the client organization, the most used report is the Agent operations report. Agent operations mainly tracks tickets, and everything related to them, tickets being the Zendesk’s and the Clients term for any customer support request. There will be the metrics used in the report and the basis for the included metrics explained shortly. The visual aspect of the reports can be observed from the included figures, the metrics always being in the blue bars and any fields for filtering data can be found above them.

4.2.1 Agent operations - Today

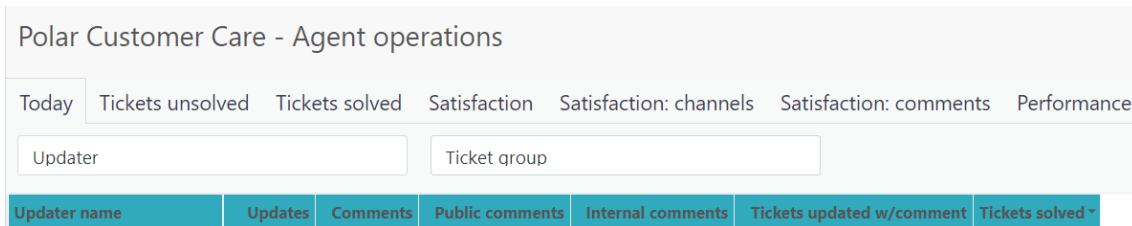


Figure 3. Agent Operations - Today (Captured 29.10.2021)

The **Today** view of the report shows the reported data relating to agent operations for the current day. Data can be filtered by using the fields **Updater** and **Ticket group**. **Updater** refers to the **Updater name**, which denotes the agent in question. **Ticket group** indicates which team's data is displayed, this can be any support team, for example, HQ care or USA. The following metrics, **Updates**, **Comments**, **Public comments**, **Internal comments**, **Tickets updated w/comment** and **Tickets solved** are Zendesk specific operations and denote the action done by the agent.

Comment related metrics show the amount total amount of comments, public comments being answers to customers or other support requests, internal comments are only accessible to employees of the client, often used for agent-to-agent communication. **Updates** denote any action taken by an agent, usually indicative of a ticket transfer or a status change. **Tickets updated w/comment** indicate status changes or transfers that include any form of comment. Finally, **Tickets solved** show the tickets solved by the updater, in practice, the agent chooses to submit the ticket as solved when they feel an issue has been solved.

4.2.2 Agent operations – Tickets unsolved

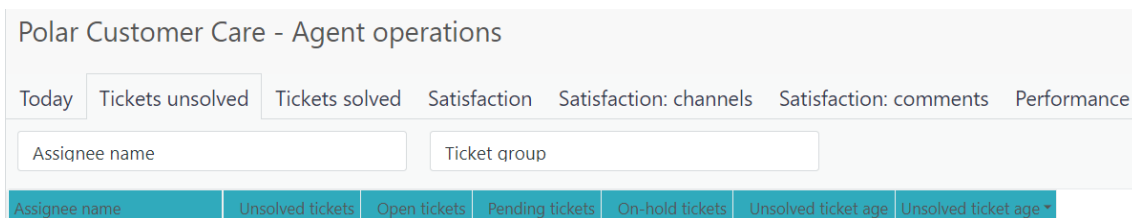


Figure 4. Agent Operations - Tickets unsolved (Captured 29.10.2021)

As previously mentioned, in case of the client, a ticket refers to any customer support request. **Tickets unsolved** view can be used for defining essentially the current workload of the assignee.

In Zendesk, tickets are assigned to agents, the agent in question being denoted by **Assignee name**. The view can be grouped via the **Ticket group**. **Unsolved tickets** shows the total amount of assigned unsolved tickets. The following: **Open**, **Pending** and **On-hold** indicate the status of the ticket. The status of the ticket is defined by the agent. **Open tickets** are waiting for solution, **Pending tickets** are awaiting for additional information from the requester of the ticket and **On-hold tickets** are usually awaiting for additional information or support from inside of the Client company or from a third party. The seemingly duplicate **Unsolved ticket age** metrics show the average age of the agent's unsolved tickets in days and the singular oldest unsolved ticket's age in days.

4.2.3 Agent operations – Tickets solved

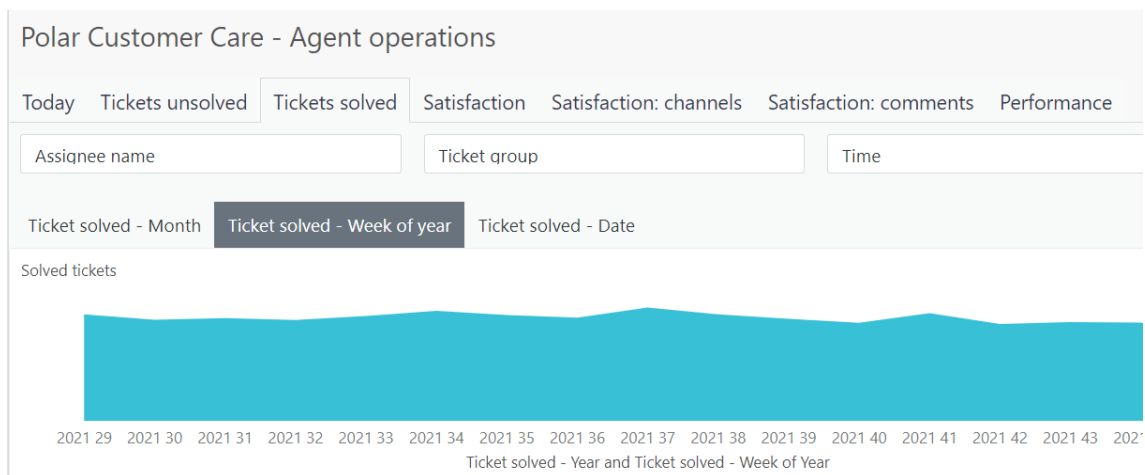


Figure 5. Agent Operations - Tickets solved (Captured 29.10.2021)

Assignee name	(Polar) Ticket Channel	2021																							
		23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44		
Tom Valkama																									
	Chat																								
	Chat offline																								
	Email (Inbound)																								
	Facebook - Private																								
	Facebook - Wall																								
	Follow-up ticket																								
	Google Play																								
	Phone (Inbound)																								
	Ticket created by Agent																								
	Twitter																								
	Twitter - DM																								
	Sum																								

Figure 6. Agent Operations - Tickets solved, view of channels (Captured 30.10.2021)

Tickets solved view offers the familiar fields for specifying searches and data, **Assignee name**, **Ticket group** and **Time**. The view also includes a graphical representation which includes all of the tickets solved, regardless of **Ticket group**, with the **Ticket solved – Month**, **Week of year** and **Date** changing the graphical representation of the solved tickets to the desired timeframe. The **(Polar) Ticket Channel** shows all of the channels via which tickets can come in and to the right, total amounts of tickets done for the specified timeframe in each channel. **Sum** at the bottom shows the total amount of tickets done for the specified timeframe, regardless of channel. In the figure 6, **Time** is set to week of year.

4.2.4 Agent operations - Satisfaction

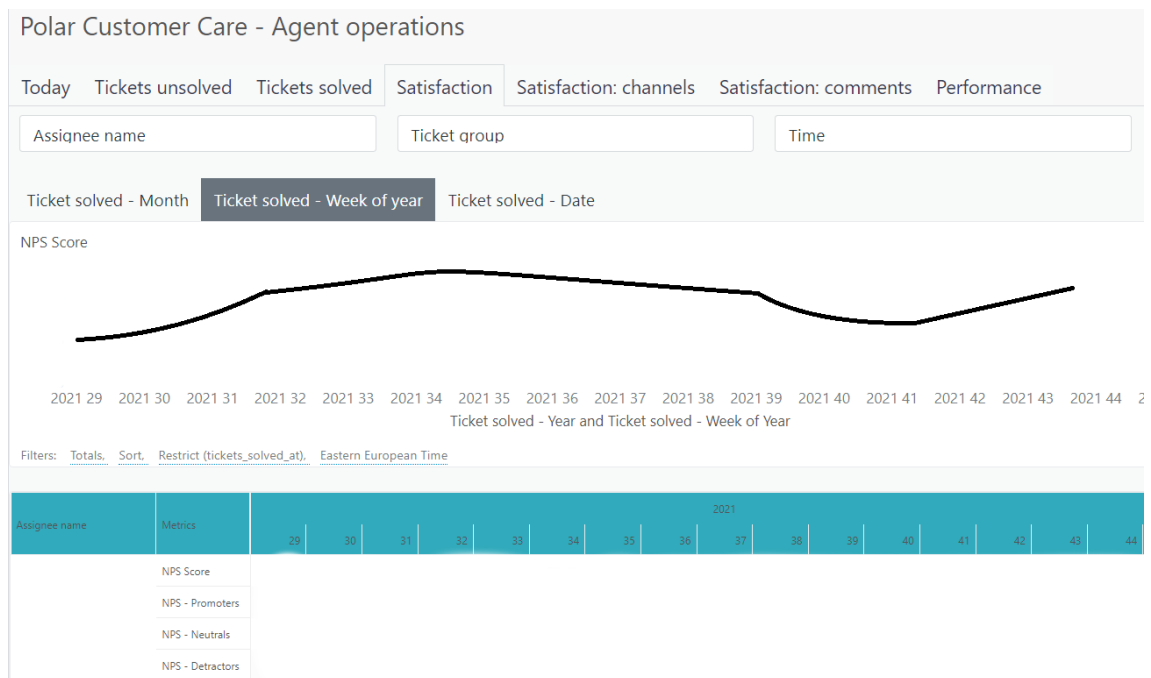


Figure 7. Agent Operations - Satisfaction (Captured 29.10.2021)

Satisfaction view of the report is referring to the main key performance indicator of the customer care, and one held to be indicative of the quality of the agent's work, to a certain extent, NPS (Lindroos, discussion 3.9.2021). The view includes the familiar three fields for specifying desired data to be displayed and a graphical view showing the NPS for all ticket groups. For the assignee, it shows the total **NPS Score** and **Promoters**, **Neutrals** and **Detractors** who make up the NPS.

4.2.5 Agent operations – Satisfaction: channels



Figure 8. Agent operations - Satisfaction: channels (captured 29.10.2021)

Satisfaction: channels shows similar information as **Tickets solved**, included is a graphical display of the channel specific NPS channels. NPS is polled from tickets from inbound, chat and email channels and these channels are displayed in the graphic. The values themselves are presented in the exact same layout as is visible in Figure 6 of **Tickets solved** with NPS shown in percentual value, channel specifically. The channels from where NPS is not polled that are listed in **Tickets solved** are also included in the report.

4.2.6 Agent operations – Satisfaction: comments

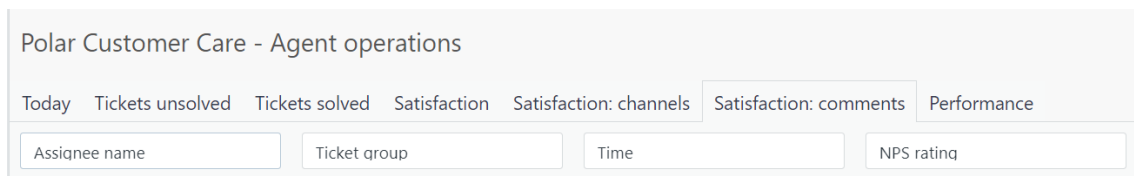


Figure 9. Agent Operations - Satisfaction: comments (Captured 29.10.2021)

The **Satisfaction: comments** view is remarkable as it does not show any information without inputting anything into the familiar three fields, as well as into the newly appearing **NPS rating**, which lets the user to limit the view to show comments from a desired NPS rating. When at least the fields

Assignee name and **Ticket group** have been filled, the comments included in the NPS ratings will be displayed.

4.2.7 Agent operations – Performance

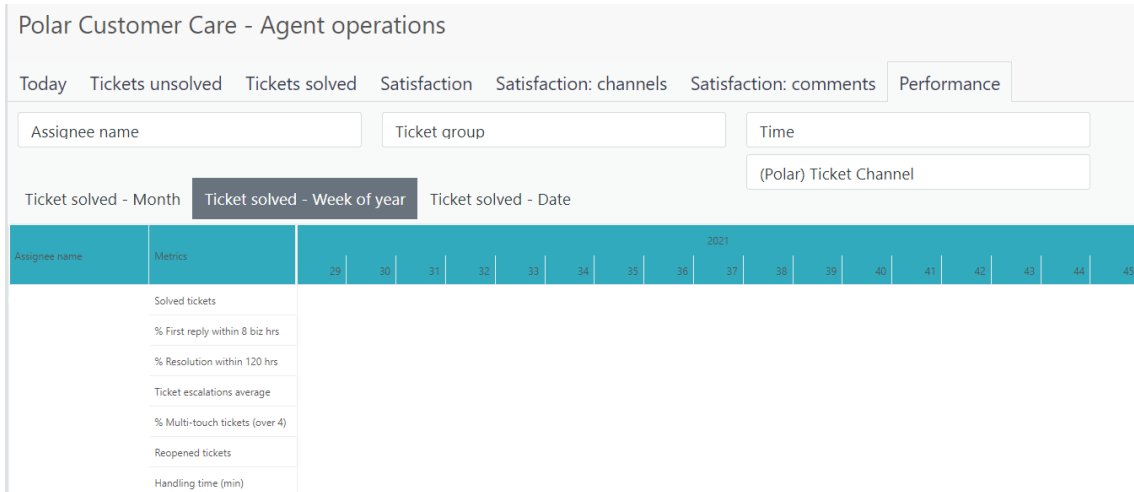


Figure 10. Agent Operations - Performance (Captured 29.10.2021)

The **Performance** view provides the most cohesive image of agent effort, with the option to filter data via the three regular parameters and additionally by **(Polar) Ticket Channel** which enables the observation of performance metrics from a certain channel, such as chat or email. **Solved tickets** indicate the amount of solved tickets, while **Reopened tickets** display the amount of tickets that have been solved, but have been reopened, usually via the customer not having received a satisfactory answer or not having his issue resolved. **% First reply within 8 biz hrs** shows the percentage of tickets that have been replied to within the 8 business hours from the ticket being created, as this is a desired level of service for the client company (Lindroos, discussion 3.9.2021). **Ticket escalations average** shows the percentage amount of tickets that the agent has escalated to either level 2, or management. **% Multi-touch tickets (over 4)** shows the percentage value from all of the agent's tickets that have had over 4 customer replies. This is tracked as this has been seen to affect NPS rating negatively as well as indicate other possible issues with the agent's competences (ibid.). **Handling time (min)** shows the average time spent working on a ticket. The time is only counted during the time the agent has the ticket opened in his workspace, meaning, it does not indicate the time the ticket might be open and waiting to be solved.

4.3 Specialists and Management

The client company utilizes a loosely tiered customer support structure. Level 1 support is capable of solving most of the support requests coming in and most agents work on this level, as this makes up for the majority of the work. The previously showcased **Agent operations** report is used to track these level 1 operations and the large extent of the report and included metrics reflect the size of the operation. If a level 1 agent faces an issue that cannot be resolved with the help of their co-workers, or for any other reason, they can consult a level 2 specialist, who are also usually involved in the development and lifecycle of products and services, or with business-to-business support and products, hence they usually can answer even the most technical questions. While level 2 specialists also work on level 1 tickets, there has been a report specifically made for tracking the volume of escalations and work on the level 2, as this information can highlight features or products with which the level 1 might need additional training or support materials. This is done for the simple fact that any time the ticket spends in the level 2 is essentially additional expenses (Lindroos, discussion 16.9.2021). The report contains similar metrics as **Agent operations** but with the focus on providing information about the overall workload and time spent working on escalations. Ideally, the level 2 specialist instructs the level 1 agent on a solution, but in cases where the issue is suspected to directly relate to hardware or code, the level 2 specialist can request assistance from outside the customer care, most often from Research and Development, who make up the level 3. These level 3 escalations are tracked outside of the Customer Care reporting, hence, will not be included.

Depending on the support location, there may be three levels of management present; team leads, managers and a director. The **Management Scorecard** report is made to answer to the needs of these parties, while containing some of the same data as **Agent operations**, it is used for tracking trends and features longer date ranges for data, most commonly used date range being year-to-date. This report is meant to answer to these different levels of management's needs. This report is also most often utilized in ad-hoc reporting, with the executive level of the client company being the most common requester for these ad-hoc reports (ibid.). The **Management Scorecard** and its metrics are illustrated in detail under heading **4.4 Management Scorecard**, as this report is restricted for management only. (ibid.)

4.4 Management Scorecard

Support team	Ticket created (YTD)	Ticket created (YTD -1 yr)	NPS Score (YTD)	NPS Score (YTD -1 yr)	% First reply within 8 biz hrs (YTD)	% First reply within 8 biz hrs (YTD -1 yr)	% Resolution within 120 hrs (YTD)	% Resolution within 120 hrs (YTD -1 yr)	% One-touch tickets (YTD)	% One-touch tickets (YTD -1 yr)
% Multi-touch tickets (over 4) (YTD)		% Multi-touch tickets (over 4) (YTD -1 yr)		Ticket escalations average (YTD)		Ticket escalations average (YTD -1 yr)				

Figure 11. Management Scorecard Metrics

The **Management Scorecard** report has two pages with identical metrics but different timeframes for reported data. Figure 11 shows the year-to-date (YTD) view, with the timeframe being current YTD and YTD -1 yr, meaning the current date, but a year before, with the YTD beginning from that date. Second timeframe that is currently in use, is exactly the same, only with month-to-date instead of YTD. Nearly all of the metrics used in the **Management Scorecard** is also available in the **Agent operations** report, without the predefined timeframes. It is worth noting, while the **Time** field in the aforementioned report offers manually definable timeframe, the report would not be able to display two different timeframes at once. The first indicator of **Support Team** indicates the Support Teams shown. All of the metrics include all of the team members combined data for any team, such as HQ care or PECC and its teams. The only metric included in the report that cannot be found from the **Agent operations** is **% One-touch tickets**. The reasoning behind not including this metric in the daily reporting for agents is due to the management's wishes to avoid focusing on one-touch tickets as they can negatively affect the customer experience, if the agents include too much information in the email (Lindroos, discussion 16.9.2021).

4.5 Polar European Customer Care

PECC or Polar European Customer Care is a branch of the customer support organization, and notably, completely outsourced and is connected to the internal customer support organization via reports and the director of Customer Care. PECC has 6 teams, one team per a language. As PECC is outsourced but work with Zendesk and mainly the same principles as other Customer Care teams, they are also included in most of the reports. Currently, PECC agents do not have access to the Zendesk Explore, making, for example, **Agent operations** inaccessible to them (Lindroos, discussion 16.9.2021). As PECC is outsourced from a large company offering external customer support solutions, they utilize their own reporting. This is achieved by them combining data from their external systems and complementing the data from these systems via the Client company

provided report, **PECC daily reporting**. This report contains, as the name suggests, data from daily operations intended to be used in a raw format for data export. This is as per the request of management of PECC, as they utilize Excel to plug the data from operations into their own reports. While unusable outside of exporting, included is a figure of the report. It will not be explained due to it not being used as is.

The screenshot shows a web interface for a report titled "Polar Customer Care - PECC daily reporting". Below the title, there are three tabs: "PECC de", "PECC other teams", and "PECC Chats". The "PECC de" tab is selected. Below the tabs, it says "PECC report: de". At the bottom, there is a table header with the following columns: "Ticket ID", "(Polar) Ticket C", "Ticket group", "Country", "Assignee name", "Ticket created", "Ticket solved", "Ticket status", "NPS: Rating (N)", "Total time spent", and "Full resolution time".

Ticket ID	(Polar) Ticket C	Ticket group	Country	Assignee name	Ticket created	Ticket solved	Ticket status	NPS: Rating (N)	Total time spent	Full resolution time
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Figure 12. PECC daily reporting

5 CURRENT STATE ANALYSIS

The completed current state analysis of the Client's Customer Care reporting will be presented in this chapter. The current state analysis will be supported with the data we have gathered from the company wide interview conducted with the current users of the reports, as well as potential beneficiaries of the reports. As was the aim with the formulation of the interview questions to be relatively quantifiable, while the interviews still being mainly qualitative, they will be presented in an aggregated table form, while the qualitative data will be utilized in providing user experiences regarding the current state of reporting. The table 1 containing generally accepted, industry wide metrics to track in support operations will be also compared to the Client's reporting to see any possible discrepancies between the included metrics in reporting.

5.1 Interview Results

The interviews were carried out as planned, with the final six interviewees holding the positions of: Customer Support Agent, interviewed in-person on 3.11.2021. Lead Customer Support Specialist, interviewed in-person on 4.11.2021. Assistant Contact Centre Manager, interviewed via Teams on 12.11.2021. Customer Care Manager, interviewed via Teams on 12.11.2021. Director of Global Customer Care, interviewed in-person on 27.10.2021. Managing Director, Nordics, interviewed via Teams on 12.11.2021. Please see table 3 for the results of the interview, to the extent they could be quantified. As the interview questions are numbered, the number represents the question. Interview questions can be found from chapter 3.3, as well as from appendix 3.

Table 3: Interview Results, Aggregated.

	Customer Support Agent	Lead Customer Support Specialist	Assistant Contact Centre Manager	Customer Care Manager	Director, Global Customer Care	Managing Director, Nordics
1)	Yes	Yes	Yes	Yes	Yes	*
3)	Yes	Yes	Yes	Yes	Yes	Yes
4)	Yes	Yes	Yes	Yes	Yes	Yes

5)	Yes	Yes	Yes	Yes	Yes	Yes
6)	No	Yes	No	Yes	Yes	*

Firstly, it is important to note that the Managing Director of Nordics does not, at least directly, receive any reported data, hence, questions 1. and 6. are marked with an asterisk to signify inability to aggregate a yes or no answer. We however discovered in the interview that they have received some reported data from various internal sources when it has been relevant to their tasks or projects at hand, so answers to questions 3., 4. and 5. could still be aggregated. Besides this, the table assists us in providing partitional answers to our research questions, on a very general level. Seeing as the question 1. resulted in “Yes” answers from everyone receiving the reports, we can say that the reporting has users. Questions 3. and 4. also resulting in “Yes” answers allows us to establish that the reporting is effective and impactful. Question 5. similarly to questions 3. and 4. with similar answers, establishes that the reported data is in a readable and understandable format. Meaning behind the mixed responses the question 6. has received are further explored in chapter 5.3, in short, “Yes” answers indicate that the interviewee found something lacking from the data.

5.2 Comparison with the Industry

We established some industry wide metrics that have been deemed commonly acceptable to follow in chapter 2.2, table 1. Having explored the current reports and metrics in use in the Customer Care, we can input a new line into the table, to include “Customer Care” in the comparison. It should be noted that as the metrics included are geared towards monitoring daily performance, this comparison is mainly done to verify the metrics in the **Agent operations** report, due to it being aimed for similar purposes.

Table 4: Commonly Used Reporting Metrics, Including Customer Care

Zendesk Blog	Issue by resolution area	Reply Time metrics	Resolution time metrics	Resolution effort metrics	Ticket re-open metrics	Next issue avoidance
Timedoctor	x	x	x	x		
startupguys	x	x	x	x		
RingCentral	x	x	x	x	x	x
Amazon Connect		x	x	x		

LeadDesk		x	x	x	x	
callcentre-helper	x	x	x	x		
Customer Care	*	x	x	x	x	x

“Issue by resolution area” has been marked by an asterisk as while it is included in the PECC reports, in other reports, it is not included as there are separate reports for this that are outside of the thesis’ scope. As presentation of the reported data is a point of interest when considering reporting, almost all of the metrics listed in table 4 can be found from the report **Agent operations**, specifically from the **Performance** view that has been detailed in chapter 4.2.7. The “Issue by resolution area” cannot be found from the report, for reasons previously mentioned. The fact that almost all of the data considered important by our sources can be found, and from a single view, is clear indication of the validity of **Agent operations** report. From our interviewees, the Customer Support Agent, as well as the Lead Customer Support Specialist mainly utilized the **Agent operations** report in their daily work and were overall satisfied with them, finding them easy-to-use and have not come across any missing data or room for improvement in the report. The positive user experience from the intended users of the report, combined with the inclusion of industry-accepted metrics allows us to validate the **Agent operations** report to match intended use of the report, as well as user needs.

5.3 SWOT Analysis

Being one of the major benefits from the current state analysis, we can use the data we have gathered to possibly provide additional value to the existing reported data and highlight the development ideas and feedback received about the reporting through the interviews. For development, as well as for the upcoming conclusions, we can utilize the Strengths, Weaknesses, Opportunities and Threats analysis, referred to as SWOT, to neatly present our data, in a matrix consisting of the previously mentioned terms (Paul, D., Cadle, J. & Yeates, D. 2014, SWOT analysis.). In the context of our research, the matrix will include an overall image of the current state of reporting and listed under their representative categories are factors that the interviewees brought up, as well as our previously established results. Development ideas are listed under the **Opportunities** in table 5.

Table 5. The SWOT Matrix

<p>Strengths</p> <p>Reported data is useful on every level.</p> <p>Reports provide operational staff with feedback.</p> <p>Reports help operational staff improve in work.</p> <p>Reports can provide qualitative and quantitative feedback.</p> <p>Reports can be used to form causalities and find explanations for data anomalies.</p>	<p>Weaknesses</p> <p>Lack of graphical illustration in reports.</p> <p>Lack of timeframe customization in management reports.</p> <p>No possibility of using one metric to explain everything.</p> <p>Reported data can be too complicated to be used.</p> <p>Lack of B2B data in reports.</p>
<p>Opportunities</p> <p>Develop predicative aspects of the reporting.</p> <p>Reduce input required by agents while maintaining accurate level of reporting.</p> <p>Development of timeframe customization in management reports.</p> <p>Development of a report that provides simple explanations for data anomalies.</p> <p>Addition of a feature to display amount of different NPS ratings in relation to contact reason.</p> <p>Extend reports to all Managing Directors.</p> <p>Improve reported data from B2B segment.</p>	<p>Threats</p> <p>Improving reporting can add complexity.</p> <p>Reported data is split into multiple different reports, requiring time to access desired data.</p>

As the results included in table 5 are nearly all based on the interview results, transcriptions of the parts of the interview where the results were extracted from are available in appendix 4. **Strengths** show similar results as can be expected from reporting from the definition of reporting in chapter 2.1. The fact that reporting can provide not only qualitative data, but quantitative as well, refers to the inclusion of NPS comments found from **Agent operations – Satisfaction: comments** as they reflect the individual customers opinion of the service event they have been a part of. From **Weaknesses**, the lack of a customizable timeframe in the management report has caused ad-hoc reports to be made just to provide data from a specific timeframe. Reported data can be too complicated to be used is referring to the operational, day-to-day reporting and specifically from the standpoint

of agent use, nullifying the strengths the daily operation report provides for agents. The aforementioned weakness does not apply to every agent, but regardless, is something that should be considered.

Opportunities are most certainly points of great interest, and to improve the digestibility of the data, the opportunities can be grouped together via the theme of opportunity. The following opportunities can be included under **Accessibility**: Reduce input required by agents while maintaining accurate level of reporting. Development of timeframe customization in management reports. Extend reports to all Managing Directors. Improve reported data from B2B segment. Themed under **Accessibility**, these opportunities enable the access to reported data as well as benefit reporting by streamlining the reporting. The lack of graphical illustrations and other duplicates listed in the weaknesses of table 5 are also included under **Accessibility**. Everything under the theme in question, directly combat a threat of any reporting, becoming too bloated with meaningless data to be utilized for business intelligence as it should. This is mentioned as: Improving reporting can add complexity.

The second grouping can be made under **Development**: Develop predicative aspects of the reporting. Addition of a feature to display amount of different NPS ratings in relation to contact reason. Development of a report that provides simple explanations for data anomalies. Both groupings, and the possible requirements for implementation in the Client company, are discussed in chapter 5.4.

5.4 Development

The additional aim of the current state analysis, as per Client company's definition of the task, was to provide insight into points of development, if requirement from those arose. The opportunity and weakness groupings from chapter 5.3, provide approachable options for development. **Accessibility** offers the opportunity to enable new users who may benefit from the reporting to access the reported data, as well as by streamlining the reports themselves. Certain opportunities are arguably easier to implement into the Client company over others, such as improving reported data from the B2B segments. The main connector between the opportunities grouped is that they do not require significant development and can be implemented on a gradual scale, much easier than the **Development** grouped opportunities. **Development** grouping, on the other hand, consist of larger projects requiring more time or effort to bring about. While they offer large improvements if done correctly, the steep requirements for investing might make them less attractive for development for the

Client company. For example, while being a next step to take from reporting and a great tool, further developing predicative aspects of the reporting to the desired effect, would require machine learning (Stupkevich, B., Sweenor, D., & Swiderek, S., 2019, Predict: Data Science and Machine Learning). While the whole of Client company's reporting would very likely be able to benefit from machine learning, it unfortunately may not be within the scope of development.

6 CONCLUSIONS

To conclude the thesis, firstly, the defined research questions shall be answered: **1.** Is the currently reported data used and if yes, how widely? Based on our findings from the interview, expansive current state of the reports and the aggregated table of answers available in chapter 5.1, we are able to conclude that the reported data is used, and the interviewed users were using the reports they had access to, actively. **2.** If the reported data is used, how effectively and impactfully? We are also able to conclude that the effect and impact of the data through the interview results in a similar fashion to the previous research question, has been excellent; as the reporting was shown to provide business intelligence as it should, combined with the additional positive of agents being able to better their work methodology based on the reported data. **3.** Is the reported data readable, and if yes, how understandable the format is? While the data was shown to be perfectly readable, as it turns out, the format could be improved via utilization of more graphical reports. Interviewees with access to the data were mostly content with the current format as well.

While the research questions provide answers to the Client company's current state analysis, the current state is that the reported data is used, accessible and effective. No metrics were found to be missing or lacking, and comparison to industry specific reporting guides proved that the current state of reporting is above average in the Client company. However, further analysis could be conducted to find the optimal users for receiving reports and ensuring everyone who has a need for the reports has access to them. The SWOT Analysis from chapter 5.3 can be referred to for further information about the current state, as well as appendix 4 for the relevant interview results. The development opportunities that have arisen are interesting and versatile, ranging from simple new reports for certain segments of support to extremely sophisticated technological solutions, such as using machine learning and data science to analyse incoming data even before it has been assessed by a human agent. For further information about the development opportunities can also be found under chapter 5.3, as well as chapter 5.4.

6.1 Discussion

Reflecting on the process of writing the thesis, I have learned more than I expected, especially from data gathering, reporting and structuring of academic papers. I hope we will be implementing at

least some of the of the development opportunities presented. Considering the thesis itself, I personally feel as if the thesis did end up lacking a bit in academic sources. However, the instructions from the client company were fairly specific with a vision of how to achieve the current state analysis so utilization of professional and empirical knowledge seemed natural. Perhaps exploration and utilization of the other possible thesis reporting formats could have been utilized with this subject to achieve better results. While at times we were busy at Polar, busy enough to not have time for the thesis, I have met my own personal deadline for the thesis, after some hiccups in the start. Progression of the project, as well as the thesis was nearly 1:1 with my plans made before the thesis.

Regardless of how the thesis is to be graded, I feel confident that the Client company will benefit to at least some extent from this thesis and will be satisfied with the results, so I am too. Regardless, this has been a bigger task than I expected, but I also feel like that both the Client company, and I, had our questions answered by doing this thesis.

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APPENDIX 1. CONTENTS OF TIME FIELD IN REPORTS

Time

Date range

Custom

Today

Yesterday

This week

Last week

This month

Last month

This year

Last year

All history

Time

Date range

From the beginning of

All history

To the end of

All history

Repeat for

APPENDIX 2. INTERVIEW QUESTIONS

1) Do you currently use any of the data Care reports? If yes, which data you use?
2) How do you utilize the reported Care data in your daily work?
3) Does the reported Care data affect your daily work or area of expertise?
4) Do you feel the Care reported data is useful?
5) Do you feel the Care data reporting format is clear and suitable for your use?
6) Do you find anything lacking from the data?

APPENDIX 3. INTERVIEW TRANSCRIPTIONS.

In this appendix, the points made in the SWOT analysis are first included, and afterwards the transcription of the parts of the interview where they were discussed. Included in the end of the transcription is the interviewee in a standard reference format.

Reports provide operational staff with feedback. Reports help operational staff improve in work. Reports can provide qualitative and quantitative feedback.

“I follow on a nearly daily basis my performance through the Zendesk Explore, mainly things like, amount of tickets done, NPS feedback, the performance page as these help me improve in my work. I do like the fact that you can get both the standard quantitative data, as well as qualitative data, since the NPS: comments are included and you can read through them and check the individual tickets and what caused the NPS to be what it is” (Customer Support Agent. Interview. 3.11.2021.)

Reports can be used to form causalities and find explanations for data anomalies. Lack of graphical illustration in reports. Lack of timeframe customization in management reports. No possibility of using one metric to explain everything. Development of timeframe customization in management reports. Development of a report that provides simple explanations for data anomalies. Addition of a feature to display amount of different NPS ratings in relation to contact reason.

“For example, relatively recently I was asked to provide the info in management scorecard, but for the current year-to-date. We don’t have a report like that, so had to make an ad-hoc report for that. – For example, relatively recent, there were misunderstanding internally about our NPS as it was dropping without a clear cause. I used the reporting and managed to find out through there and form a causality for the case in question, but they always have to be done case-by-case. I would really like, and have been planning unofficially, some new report like that that would include the right mix of metrics to provide simple explanations for causalities as well as for any data anomalies. Something I find lacking from the reported data is the opportunity to have the NPS scores grouped by product, essentially contact reason, so we could see what reason causes the most highest or lowest rated NPS scores, for example.” (Lindroos, Director, Global Customer Care. Interview. 27.10.2021.)

Reported data can be too complicated to be used. Reported data is split into multiple different reports, requiring time to access desired data.

“One wish for development that I have is that there would be a possibility to just get the reports for a specific team, like just the USA team members and metrics, without having to do any extra clicks. Currently when I go into the explore to go through the data, I’ll have to do these selections to compile it first, and go to different reports to get everything I want. So if that could maybe be at somepoint added, I would be happy. – Agents do not really use the data, I provide the relevant data in a more understandable format to the agents as finding something can be quite challenging and there is quite a bit of data.” (Customer Care Manager. Interview. 12.11.2021.)

Develop predicative aspects of the reporting. Reduce input required by agents while maintaining accurate level of reporting.

“I do find something lacking from the reported data. I would like to see a dashboard added from where it would be possible to see some trends from tickets that have yet to be even opened, something could mine that information or something along those lines. This would in turn reduce inputs required from the agents, making life easier for everyone involved. The categorization could also be made simpler.” (Lead Customer Support Specialist. Interview. 4.11.2021.)

Lack of B2B data in reports. Extend reports to all Managing Directors. Improve reported data from B2B segment.

“Correct, I do not currently really receive any reporting, and if I do, it usually is related to some special case or a project. They also are my main utilizations for the data. Also the data I’ve received so far, is mainly just qualitative. I am interested in becoming familiar with the Zendesk Explore, as I can then check everything I might need from there and know better what sort of reported data I might require and wish to acquire. I imagine that the reporting obviously quite a bit different on B2C and B2B operations due to the differences in customers. – We could add more B2B reporting. That would be good.” (Managing Director, Nordics. Interview. 12.11.2021.)

The SWOT analysis is also included here.

Strengths	Weaknesses
Reported data is useful on every level.	Lack of graphical illustration in reports.
Reports provide operational staff with feedback.	Lack of timeframe customization in management reports.

<p>Reports help operational staff improve in work.</p> <p>Reports can provide qualitative and quantitative feedback.</p> <p>Reports can be used to form causalities and find explanations for data anomalies.</p>	<p>No possibility of using one metric to explain everything.</p> <p>Reported data can be too complicated to be used.</p> <p>Lack of B2B data in reports.</p>
<p>Opportunities</p> <p>Develop predicative aspects of the reporting.</p> <p>Reduce input required by agents while maintaining accurate level of reporting.</p> <p>Development of timeframe customization in management reports.</p> <p>Development of a report that provides simple explanations for data anomalies.</p> <p>Addition of a feature to display amount of different NPS ratings in relation to contact reason.</p> <p>Extend reports to all Managing Directors.</p> <p>Improve reported data from B2B segment.</p>	<p>Threats</p> <p>Improving reporting can add complexity.</p> <p>Reported data is split into multiple different reports, requiring time to access desired data.</p>