AblyPro | Webinars

5 Service Cloud Dashboards For Your Board

SPEAKER

Ali Zakir
Service Cloud/Field Service Specialist
AblyPro

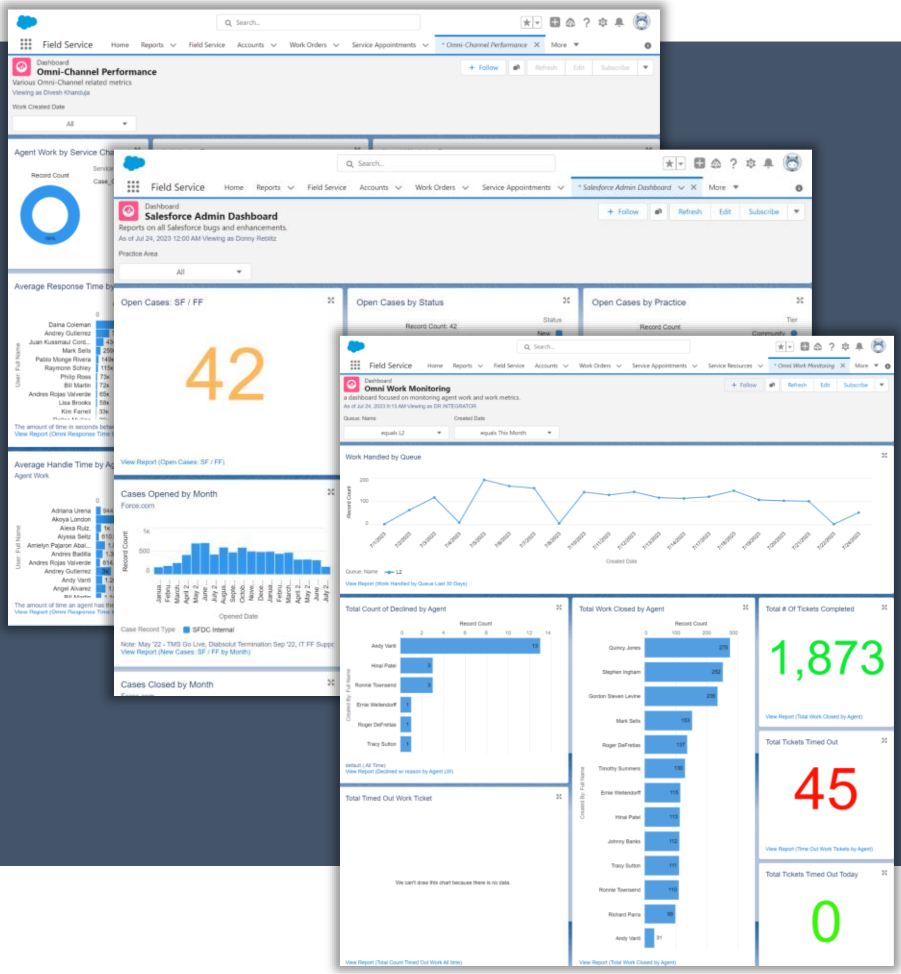
Agenda

5 SERVICE CLOUD DASHBOARDS

For Your Board

- Why Service Cloud Reports and Dashboards
- Importance of Reports and Dashboards
- 5 Service Cloud Dashboards for Your Board

Why Service Cloud Reports & Dashboards



Track Bad Data

Monitor bad data in your Salesforce instance for seamless automation and streamlined customer service operations.

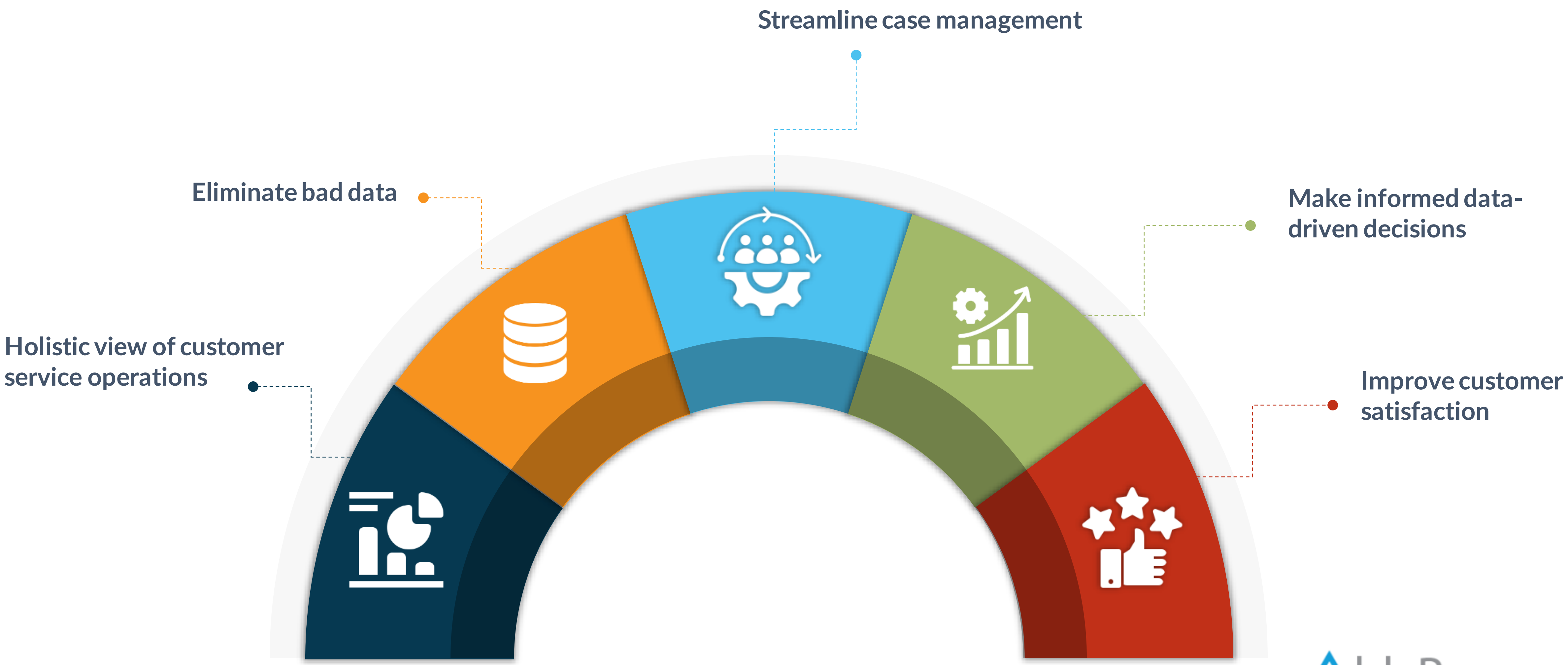
Decentralized Information

Reduce data silos and the chance of data loss or inaccurate data in the system by having decentralized data - enable real-time shared view of data.

Data Visualization

Easily understand processed data in the form of graphs, charts, maps, or other visual representations as per your requirements.

Importance of Reports & Dashboards

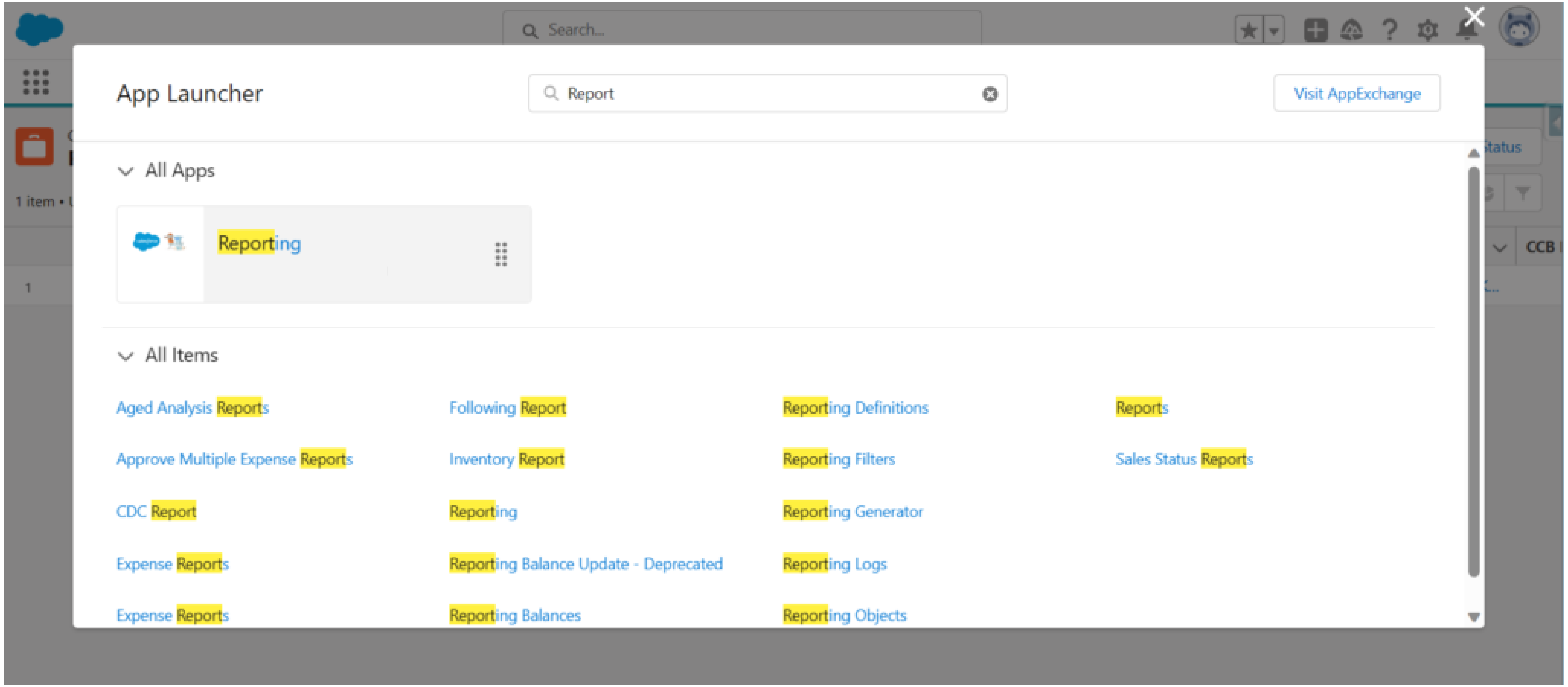


How to Create a Report in Service Cloud

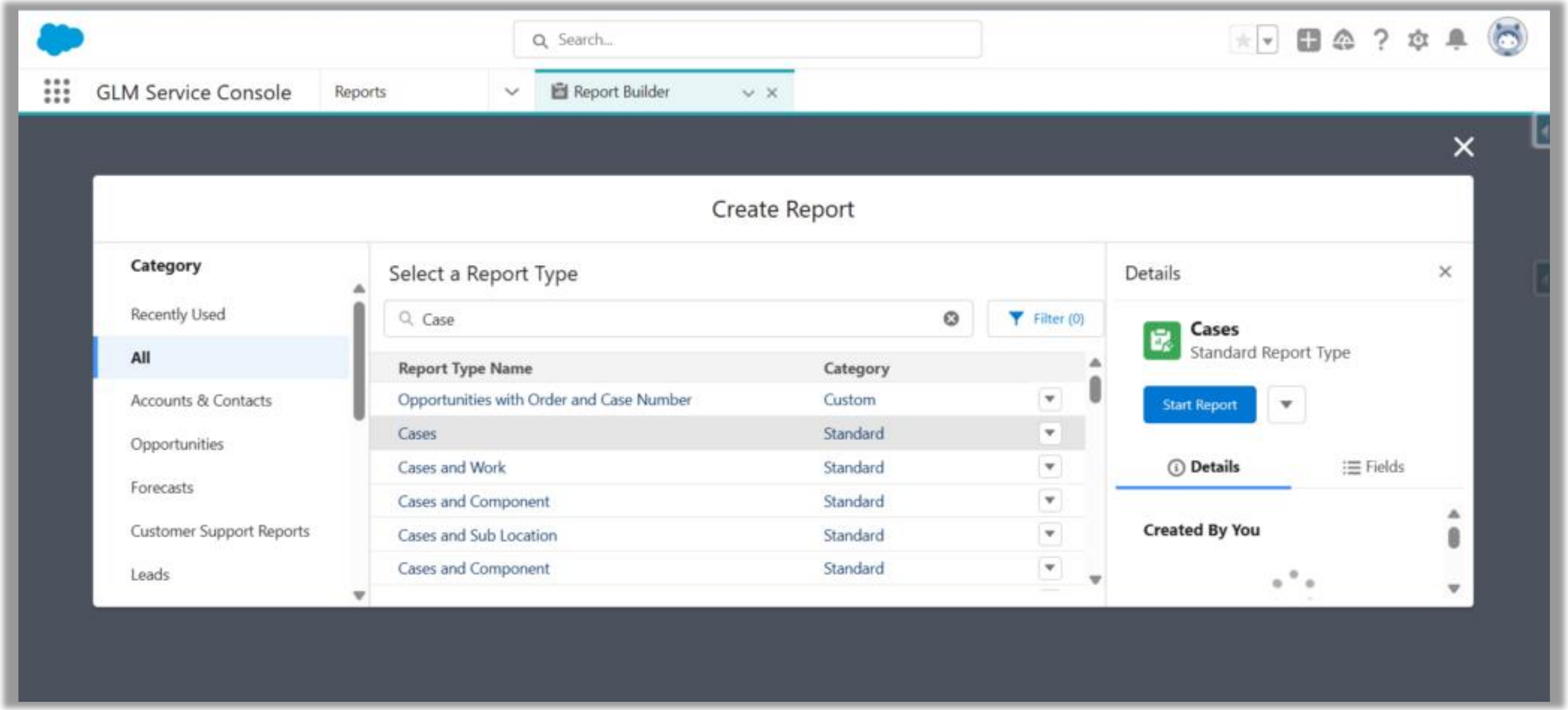
Explained in 4 Easy Steps

AblyPro

Step #1: Create a New Report from App Launcher

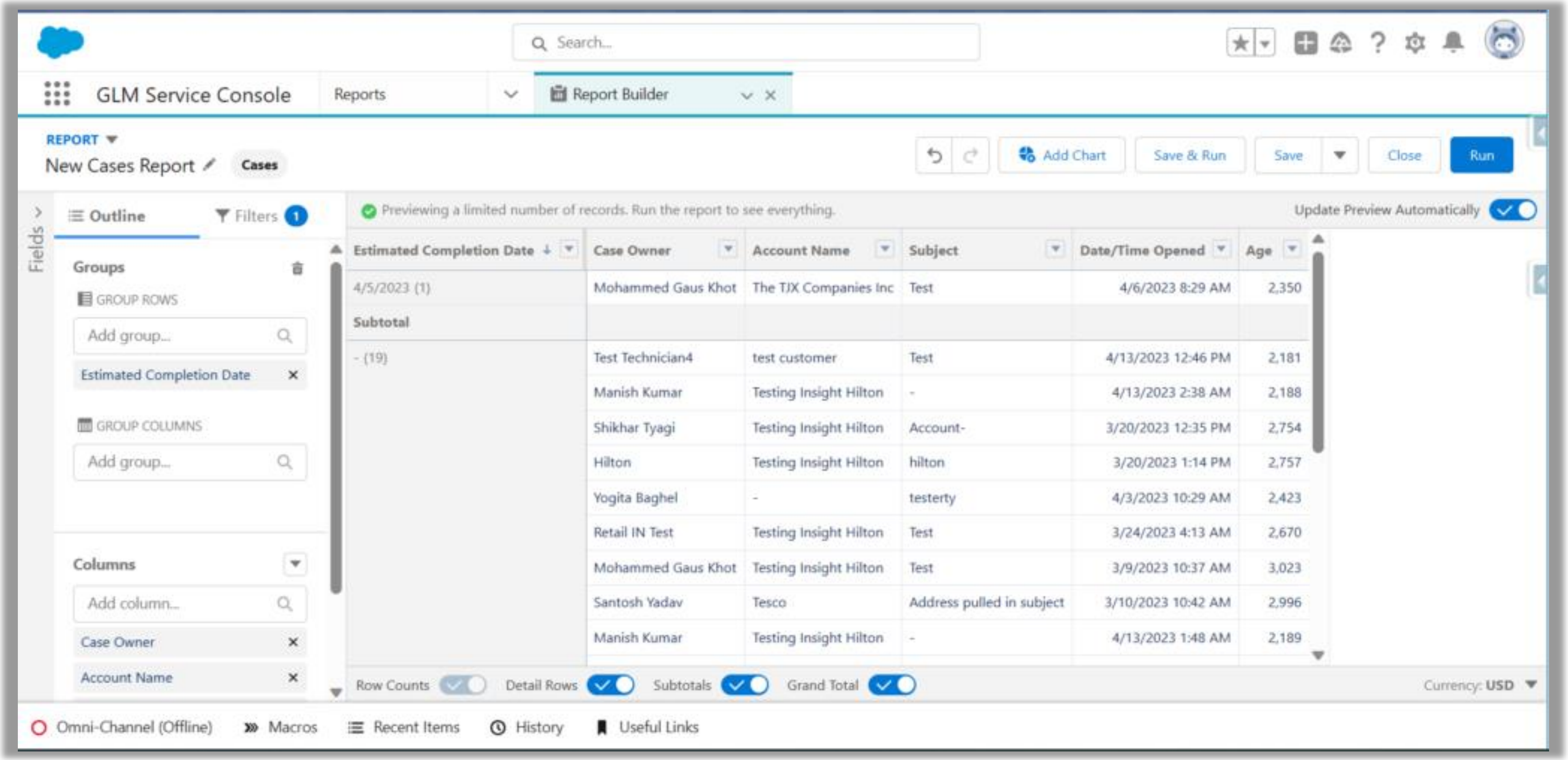


Step #2: Choose Your Report Type

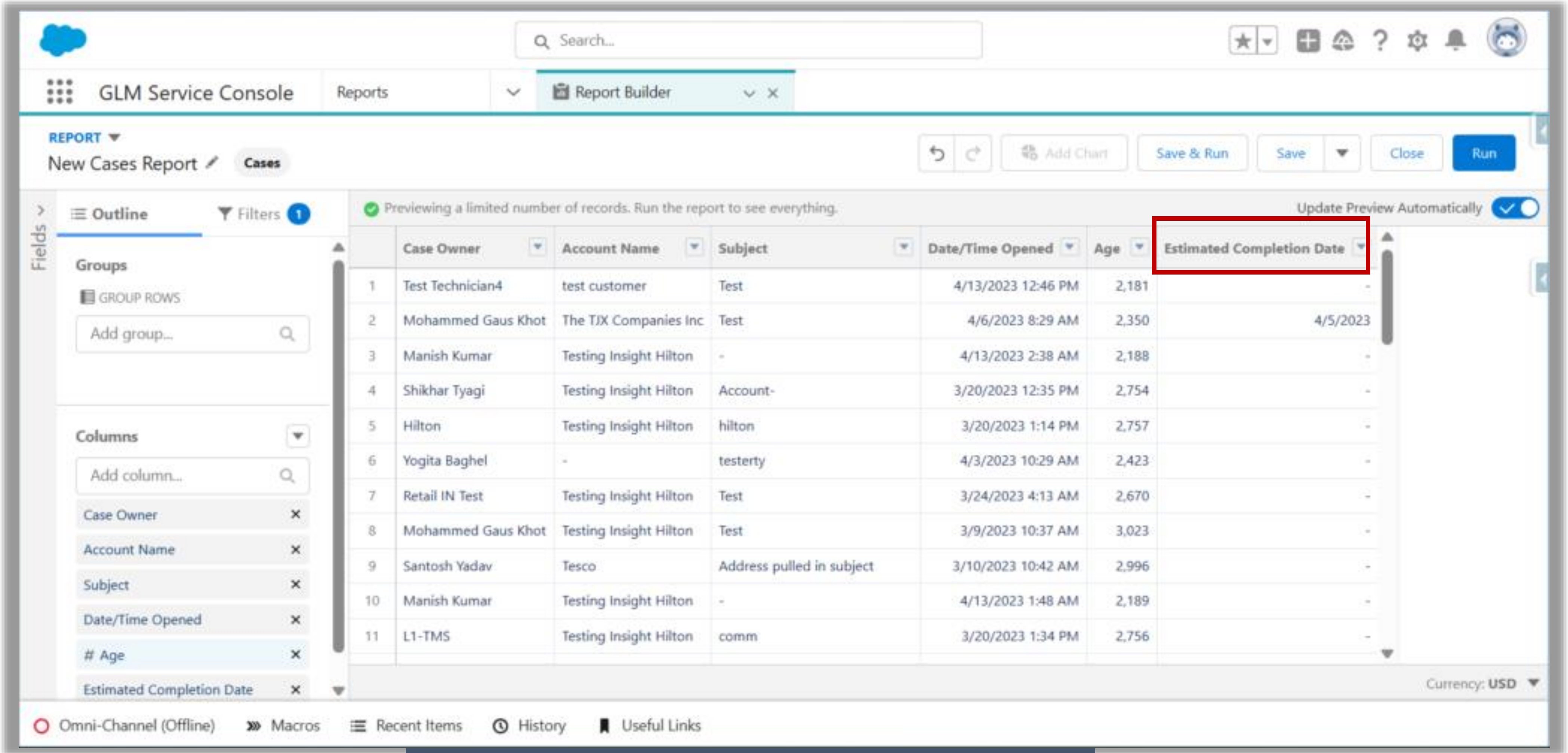


AblyPro

Step #3: Filter Your Data & Select Columns/Fields



Step #4: Run Your Report



Here we have used “Estimated Completion Date” as a grouping.

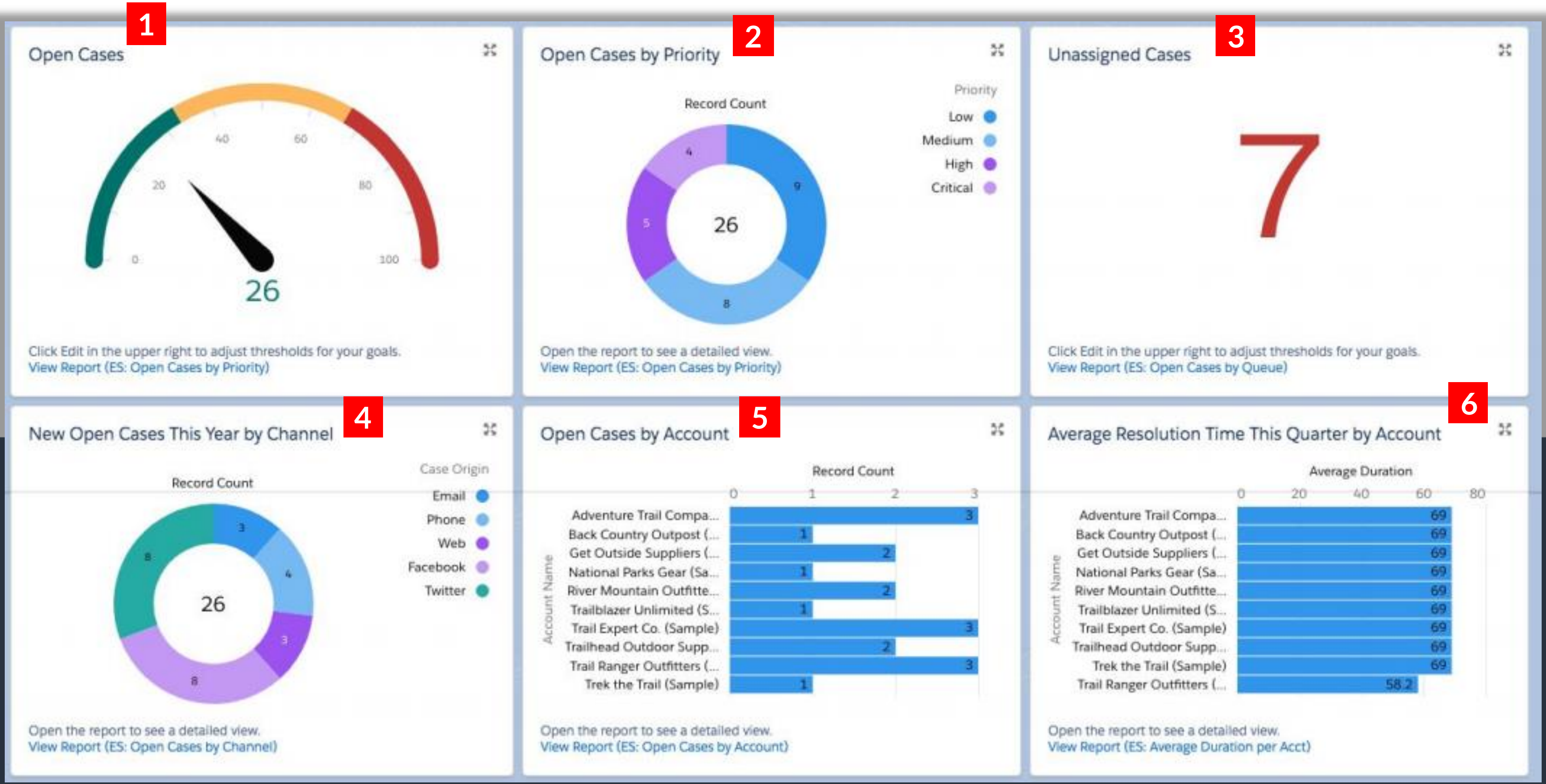
5 Service Cloud Dashboards For Your Board

AblyPro

#1: Dashboard for Executive Sponsors/ Project Managers

PURPOSE OF DASHBOARD

- ✓ Serves as a health check for services business
- ✓ Executive sponsors can make data-driven decisions
- ✓ Identify areas of improvement
- ✓ Set strategic goals for providing better customer service



1. Open Cases
Track current open cases for real-time insights on customer issues.

2. Open Cases by Priority
Monitor case priorities to handle urgent matters promptly.

3. Unassigned Cases
Monitor unassigned cases to avoid customer query delays.

4. New Open Cases This Year by Channel
Track new cases by channel to understand communication preferences.

5. Open Cases by Account
Identify customer concerns via account-specific open cases.

6. Average Resolution Time This Quarter by Account
Agents can measure average resolution time by account.

#2: KPI Dashboard for Stakeholders

PURPOSE OF DASHBOARD

- ✓ Shows important metrics to customer service team
- ✓ Provides a holistic view of how cases are managed

1. Open Cases by Status
Track open cases by status for service efficiency.

2. Cases Opened This Quarter by Channel
Monitor cases opened this quarter by channel for insights.

3. Open Cases by Account
Prioritize customer demands via account-specific open cases.

4. Percent of Open Cases Escalated
Analyze percent of escalated open cases for critical issues.

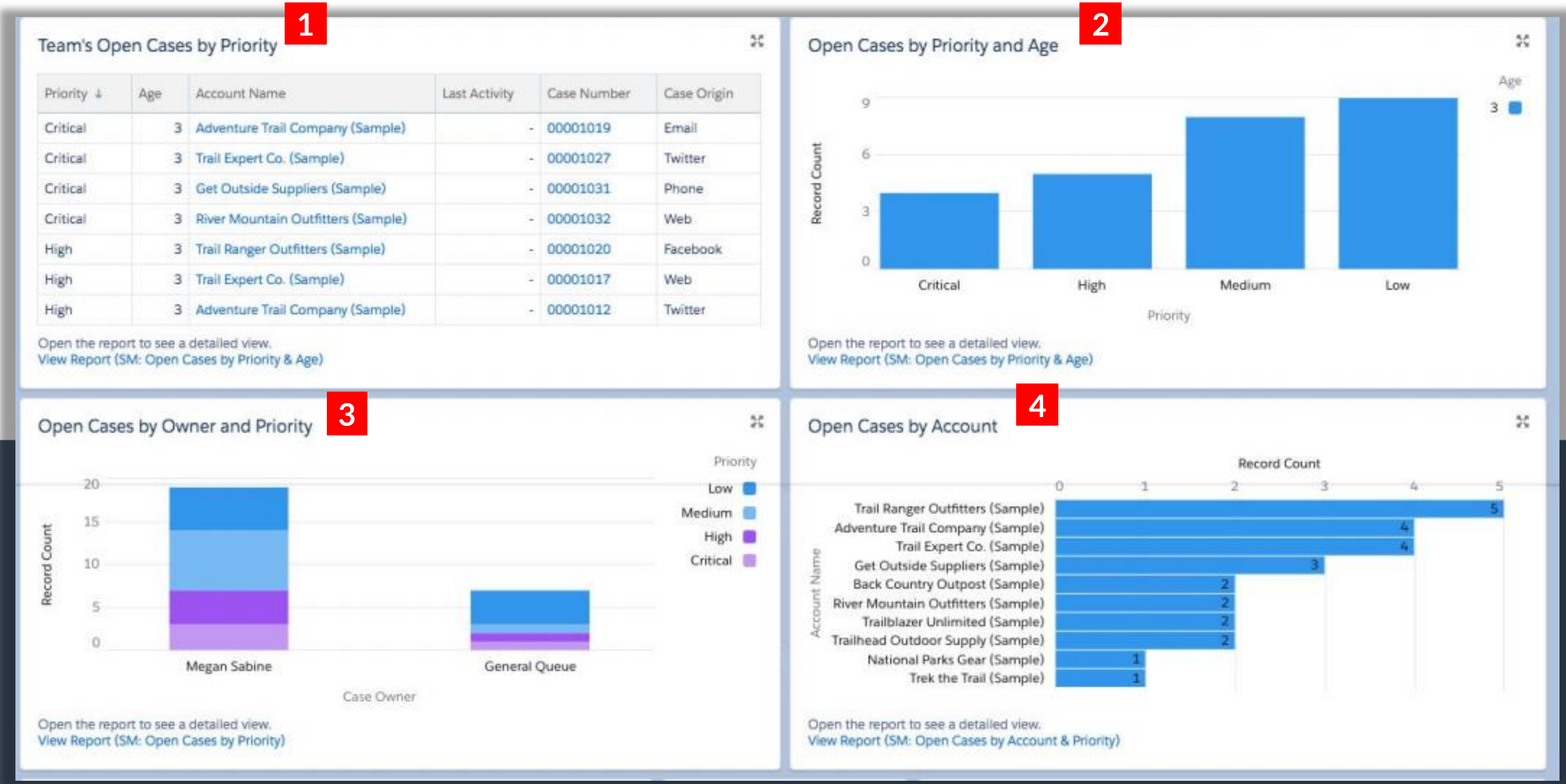
5. Escalated Cases Opened This Quarterly by Channel
Monitor agent efficiency with escalated cases this quarter by channel.

6. Escalated Cases by Account
Agents address concerns with escalated cases by account.

#3: Dashboard for Service Managers

PURPOSE OF DASHBOARD

- ✓ Similar to KPI and Executive Sponsor Dashboards, but more focused on their team specifically.



1. Team's Open Cases by Priority
Managers can prioritize their team's open cases for better efficiency.

2. Open Cases by Priority and Age
Prioritize open cases by age for timely resolution.

3. Open Cases by Owner and Priority
Prioritize open cases by owner for better workload management.

4. Open Cases by Account
Managers can look to provide personalized customer support with account-specific open cases.

#4: Dashboard for Service Agents

PURPOSE OF DASHBOARD

- ✓ For front line service agents
- ✓ Service agents can track their own performance metrics

1. Your Top Priority Cases
Top priority cases for service agents.

2. Age of Open Cases in Days
Service agents can pick what work to tackle first.

3. Open Cases by Channel
Track open cases by channel – email, phone, social media, website, for better tracking.

4. New Cases This Year By Account
Service agents can track the number of new cases opened this year to better analyze their performance.

5. Average Number of Days to Resolve Cases
Measure agent case resolution time for efficiency.

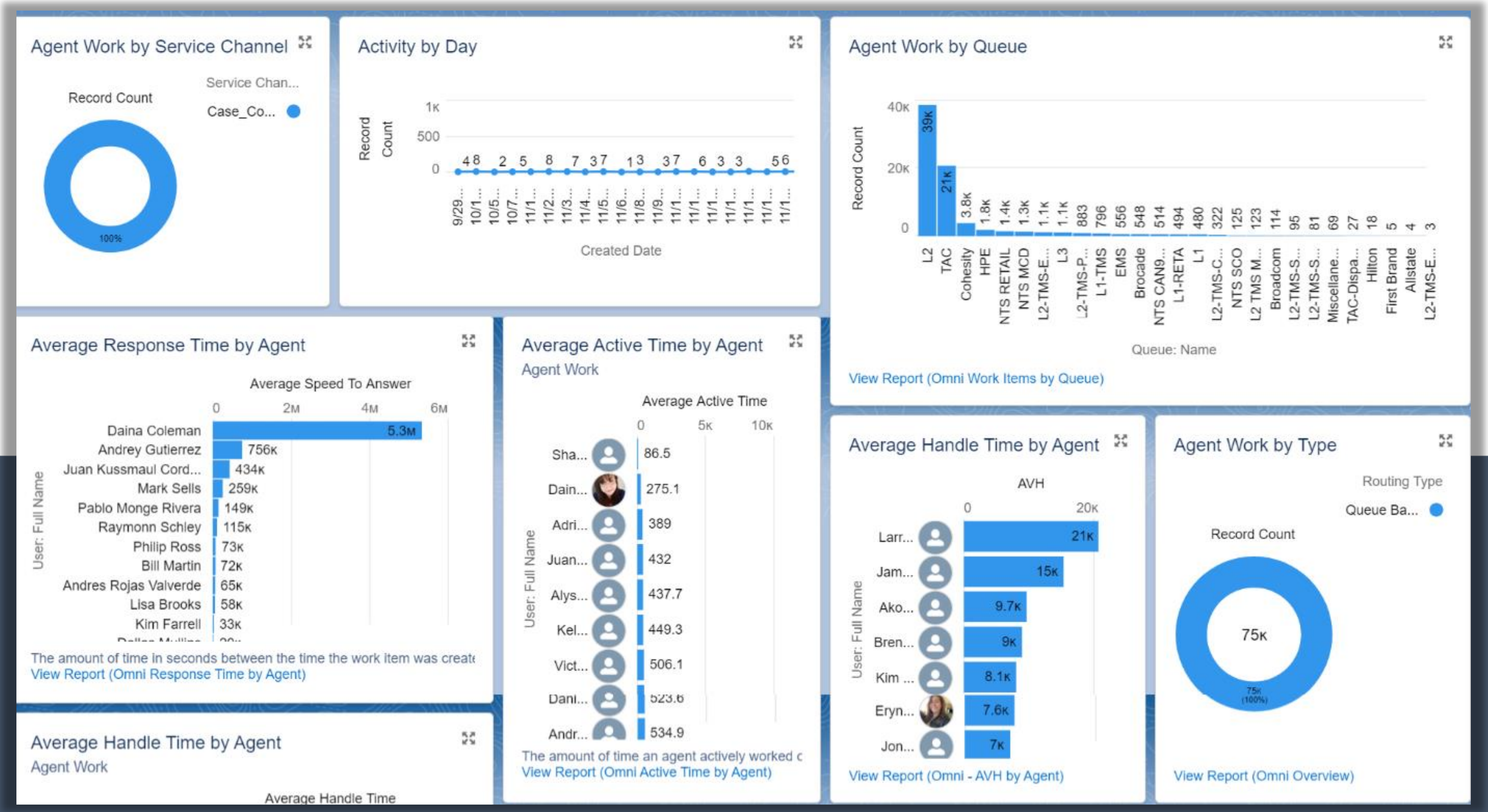
6. Average Age of Open Cases in Days
Agents prioritize open cases for better workload management.

7. Average Time to Close Cases
Monitor average time to close cases for faster resolutions.

#5: Omni Channel Performance Dashboard

PURPOSE OF DASHBOARD

- ✓ Connects all support channels and displays data in one consolidated place
- ✓ Helps monitor agent work performance to maximize efficiency



1. *Agent Work by Service Channel*
Monitor agent work across service channels.

2. *Activity by Day*
Monitor agent's daily activity metrics.

3. *Agent Work by Queue*
Track agent work distribution by queue.

4. *Average Response Time by Agent*
Measure average time taken by agents to response to queries.

5. *Average Active Time by Agent*
Monitor time for which agents stay active (on average).

6. *Average Handle Time by Agent*
Track average handle time per agent.

7. *Agent Work by Type*
Track agent work distribution by type.

Contact Us

Salesforce Service Cloud & Field Service Success Consultant

Address

AblyPro
12410 Milestone Center Drive
Suite 600
Germantown, MD 20876

Phone & Email

240-259-3076
wecare@ablypro.com

Social Media

Facebook.com/ablypro
Twitter.com/ablypro
Linkedin.com/company/ablypro