

# 5 Service Cloud Dashboards For Your Board

SPEAKER

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## 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



# Agenda

# 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

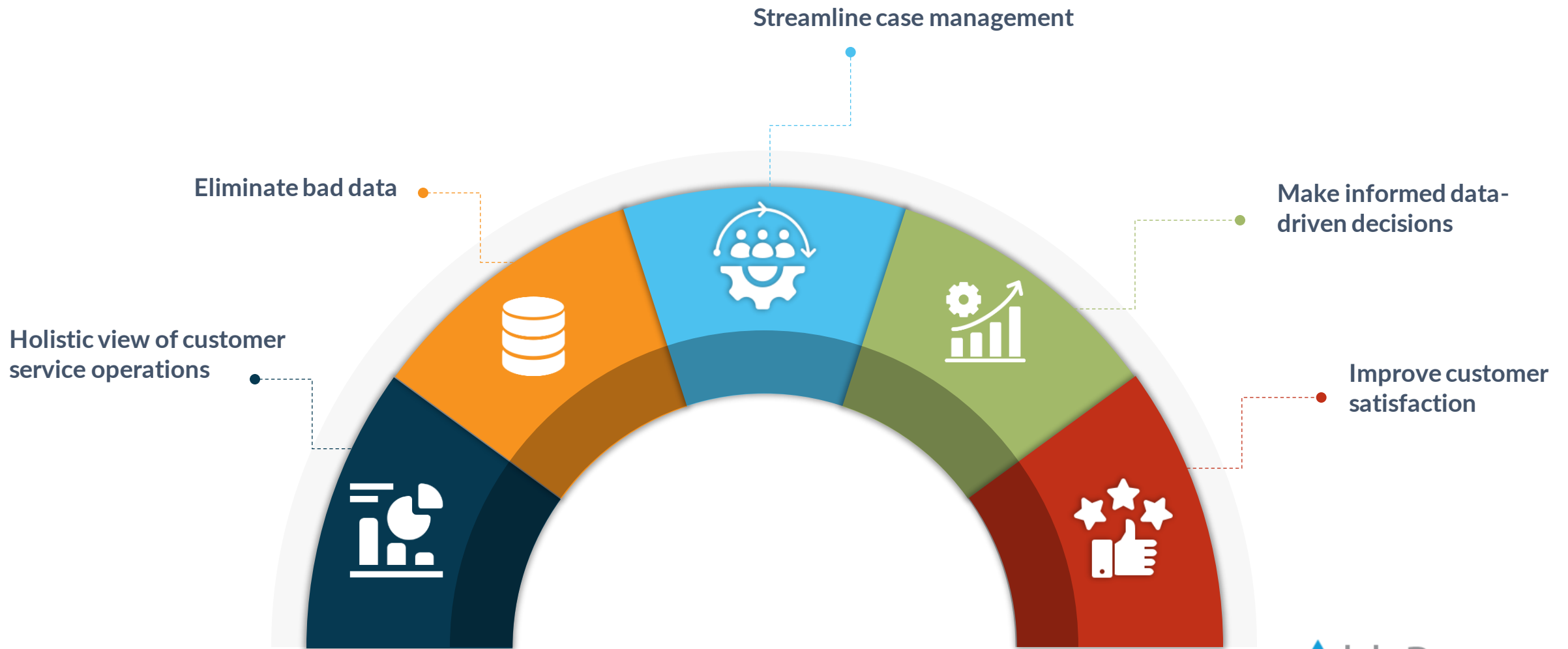
Reduce data silos and the chance of data loss or inaccurate data in the system by having decentralized data - enable real-time shared view of data.



## 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



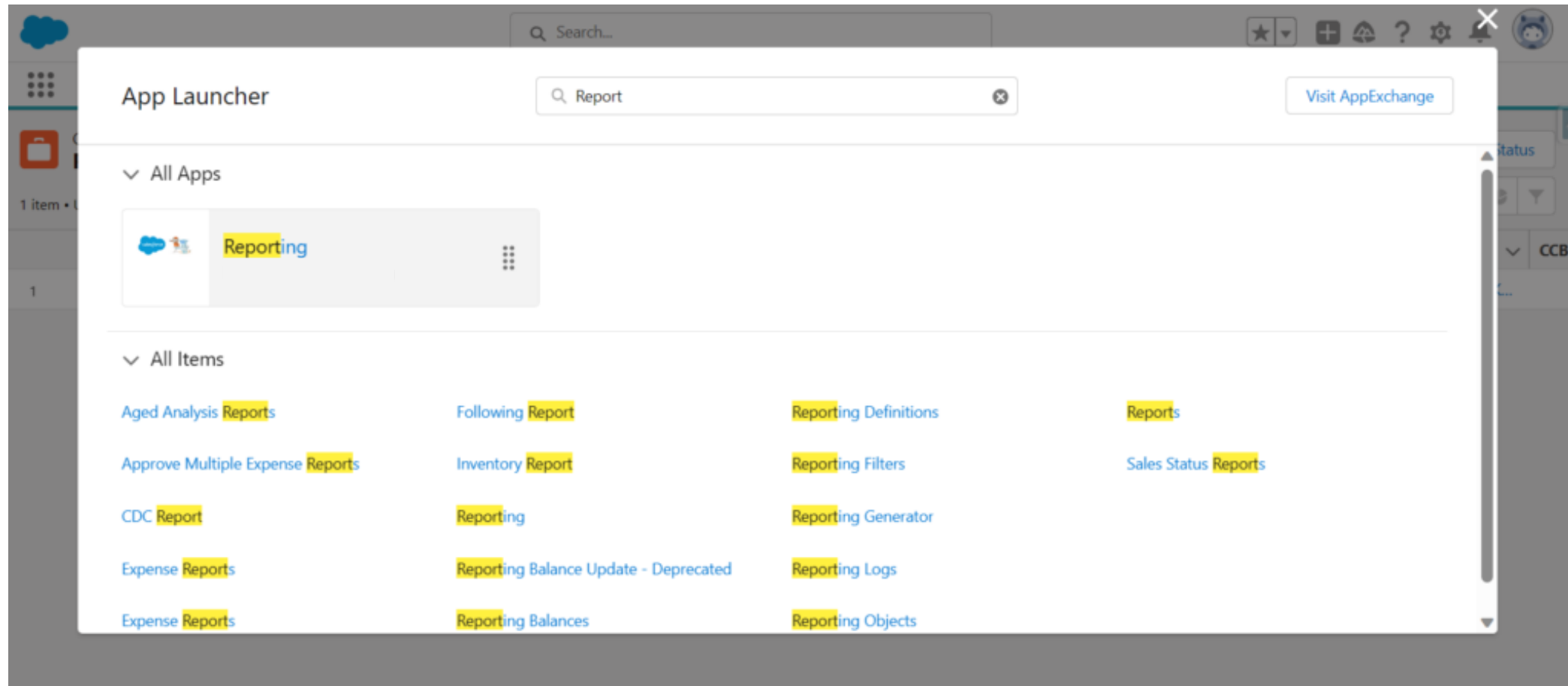
# How to Create a Report in Service Cloud

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*Explained in 4 Easy Steps*



# Step #1: Create a New Report from App Launcher



# Step #2: Choose Your Report Type

The screenshot displays the 'Create Report' window in the GLM Service Console. The breadcrumb trail is 'GLM Service Console > Reports > Report Builder'. The main area is titled 'Create Report' and is divided into three sections:

- Category:** A sidebar on the left with 'All' selected. Other categories include 'Recently Used', 'Accounts & Contacts', 'Opportunities', 'Forecasts', 'Customer Support Reports', and 'Leads'.
- Select a Report Type:** A central panel with a search bar containing 'Case' and a 'Filter (0)' button. Below is a table of report types:

Report Type Name	Category
Opportunities with Order and Case Number	Custom
Cases	Standard
Cases and Work	Standard
Cases and Component	Standard
Cases and Sub Location	Standard
Cases and Component	Standard

- Details:** A panel on the right showing 'Cases' as a 'Standard Report Type' with a 'Start Report' button. Below this are tabs for 'Details' and 'Fields', and a section titled 'Created By You'.

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

The screenshot displays the 'Report Builder' interface in the 'GLM Service Console'. The main area shows a preview of a report titled 'New Cases Report' with the following data:

Estimated Completion Date	Case Owner	Account Name	Subject	Date/Time Opened	Age
4/5/2023 (1)	Mohammed Gaus Khot	The TJX Companies Inc	Test	4/6/2023 8:29 AM	2,350
<b>Subtotal</b>					
- (19)	Test Technician4	test customer	Test	4/13/2023 12:46 PM	2,181
	Manish Kumar	Testing Insight Hilton	-	4/13/2023 2:38 AM	2,188
	Shikhar Tyagi	Testing Insight Hilton	Account-	3/20/2023 12:35 PM	2,754
	Hilton	Testing Insight Hilton	hilton	3/20/2023 1:14 PM	2,757
	Yogita Baghel	-	testerty	4/3/2023 10:29 AM	2,423
	Retail IN Test	Testing Insight Hilton	Test	3/24/2023 4:13 AM	2,670
	Mohammed Gaus Khot	Testing Insight Hilton	Test	3/9/2023 10:37 AM	3,023
	Santosh Yadav	Tesco	Address pulled in subject	3/10/2023 10:42 AM	2,996
	Manish Kumar	Testing Insight Hilton	-	4/13/2023 1:48 AM	2,189

At the bottom of the interface, there are several toggle switches: 'Row Counts' (checked), 'Detail Rows' (checked), 'Subtotals' (checked), and 'Grand Total' (checked). The currency is set to 'USD'.



# Step #4: Run Your Report

The screenshot shows the 'Report Builder' interface in the 'GLM Service Console'. The report is titled 'New Cases Report' and is currently in 'Preview' mode. The table displays 11 records with columns for Case Owner, Account Name, Subject, Date/Time Opened, Age, and Estimated Completion Date. The 'Estimated Completion Date' column is highlighted with a red box. The interface includes a search bar, navigation tabs, and various action buttons like 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. A status bar at the bottom shows 'Omni-Channel (Offline)', 'Macros', 'Recent Items', 'History', and 'Useful Links'. The currency is set to USD.

Case Owner	Account Name	Subject	Date/Time Opened	Age	Estimated Completion Date
1 Test Technician4	test customer	Test	4/13/2023 12:46 PM	2,181	-
2 Mohammed Gaus Khot	The TJX Companies Inc	Test	4/6/2023 8:29 AM	2,350	4/5/2023
3 Manish Kumar	Testing Insight Hilton	-	4/13/2023 2:38 AM	2,188	-
4 Shikhar Tyagi	Testing Insight Hilton	Account-	3/20/2023 12:35 PM	2,754	-
5 Hilton	Testing Insight Hilton	hilton	3/20/2023 1:14 PM	2,757	-
6 Yogita Baghel	-	testerty	4/3/2023 10:29 AM	2,423	-
7 Retail IN Test	Testing Insight Hilton	Test	3/24/2023 4:13 AM	2,670	-
8 Mohammed Gaus Khot	Testing Insight Hilton	Test	3/9/2023 10:37 AM	3,023	-
9 Santosh Yadav	Tesco	Address pulled in subject	3/10/2023 10:42 AM	2,996	-
10 Manish Kumar	Testing Insight Hilton	-	4/13/2023 1:48 AM	2,189	-
11 L1-TMS	Testing Insight Hilton	comm	3/20/2023 1:34 PM	2,756	-

Here we have used "Estimated Completion Date" as a grouping.

# 5 Service Cloud Dashboards For Your Board

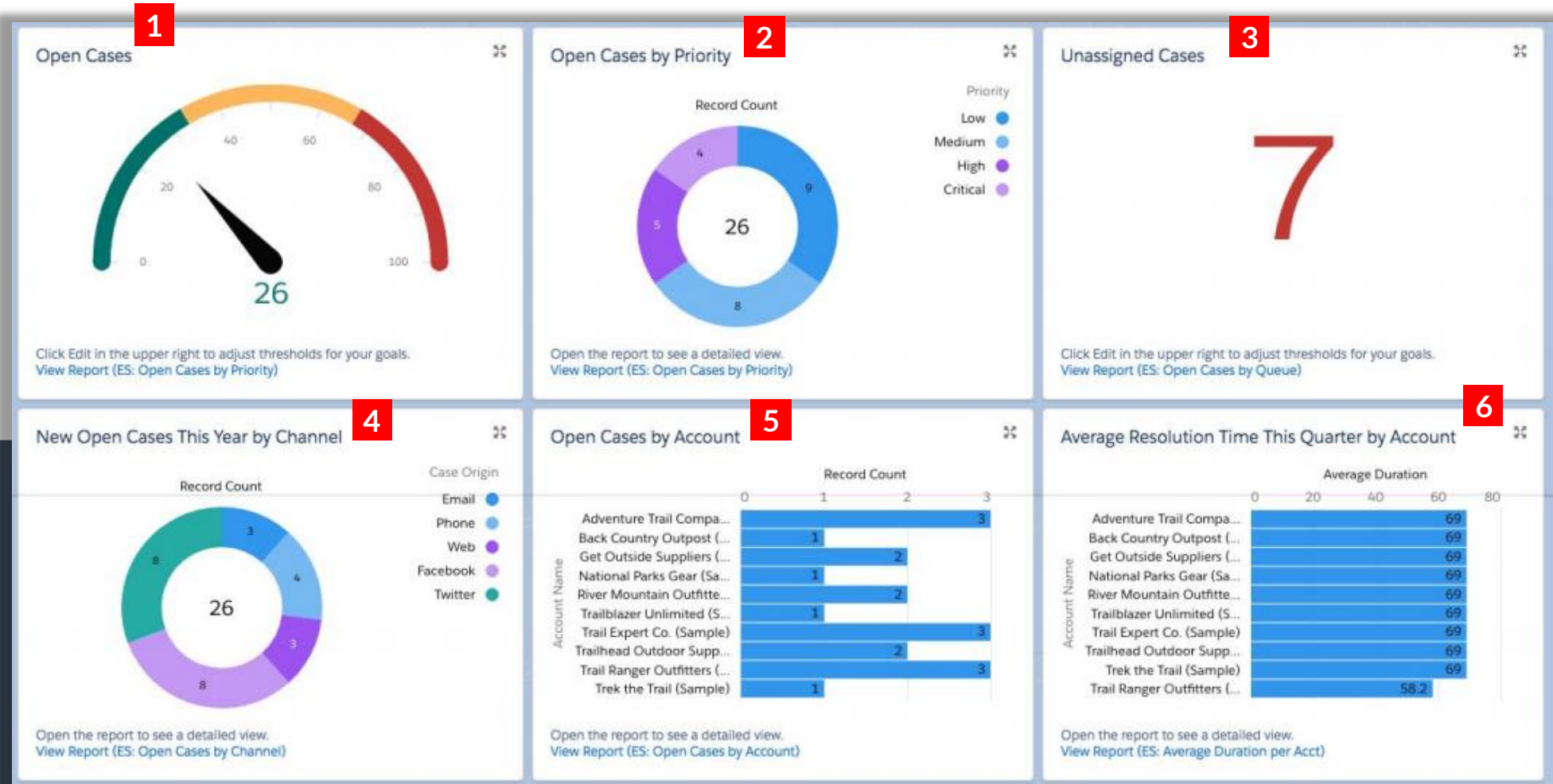
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# #1: Dashboard for Executive Sponsors/ Project Managers

## 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.

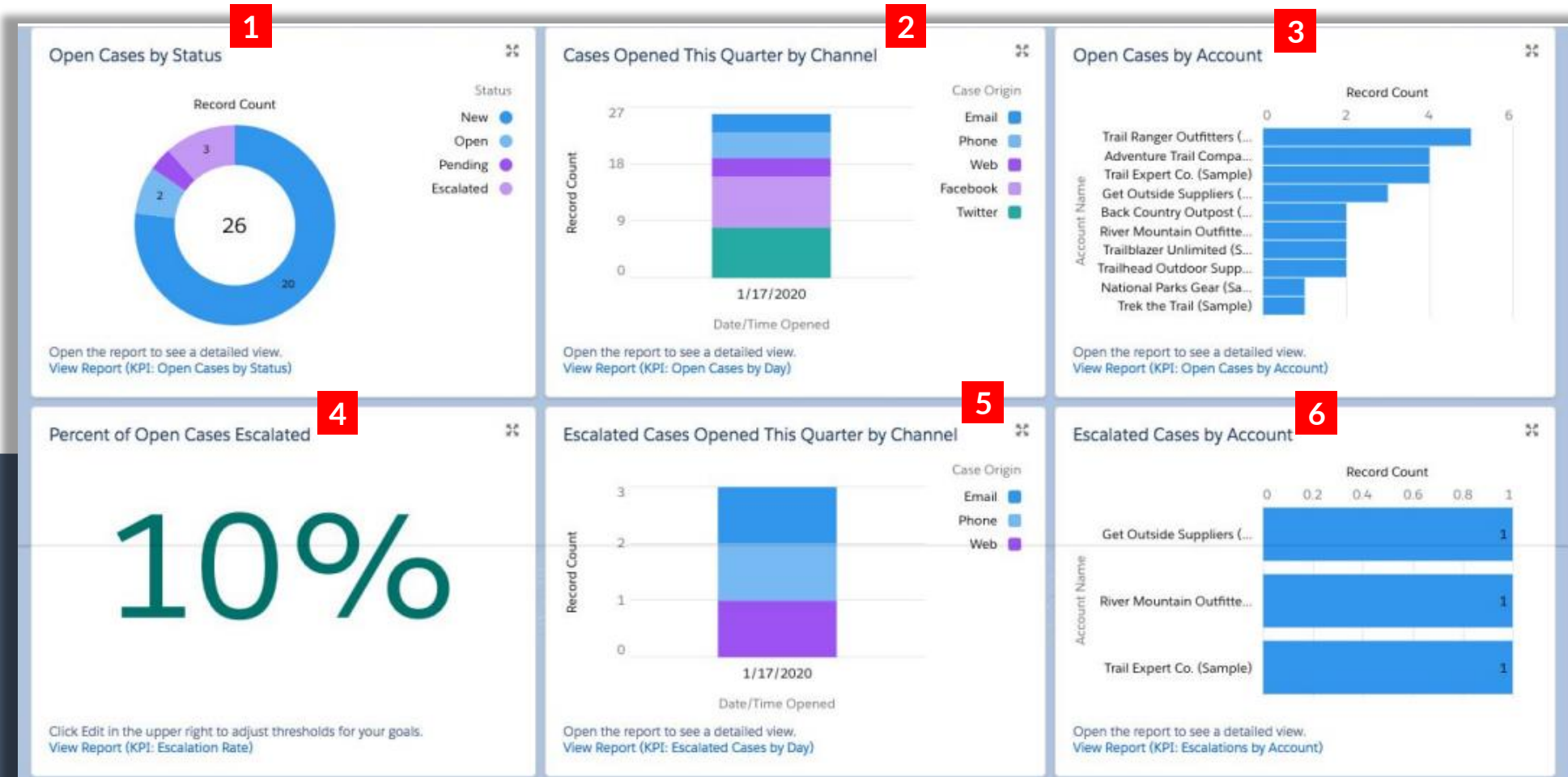
- 5. Open Cases by Account**  
Identify customer concerns via account-specific open cases.

- 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.

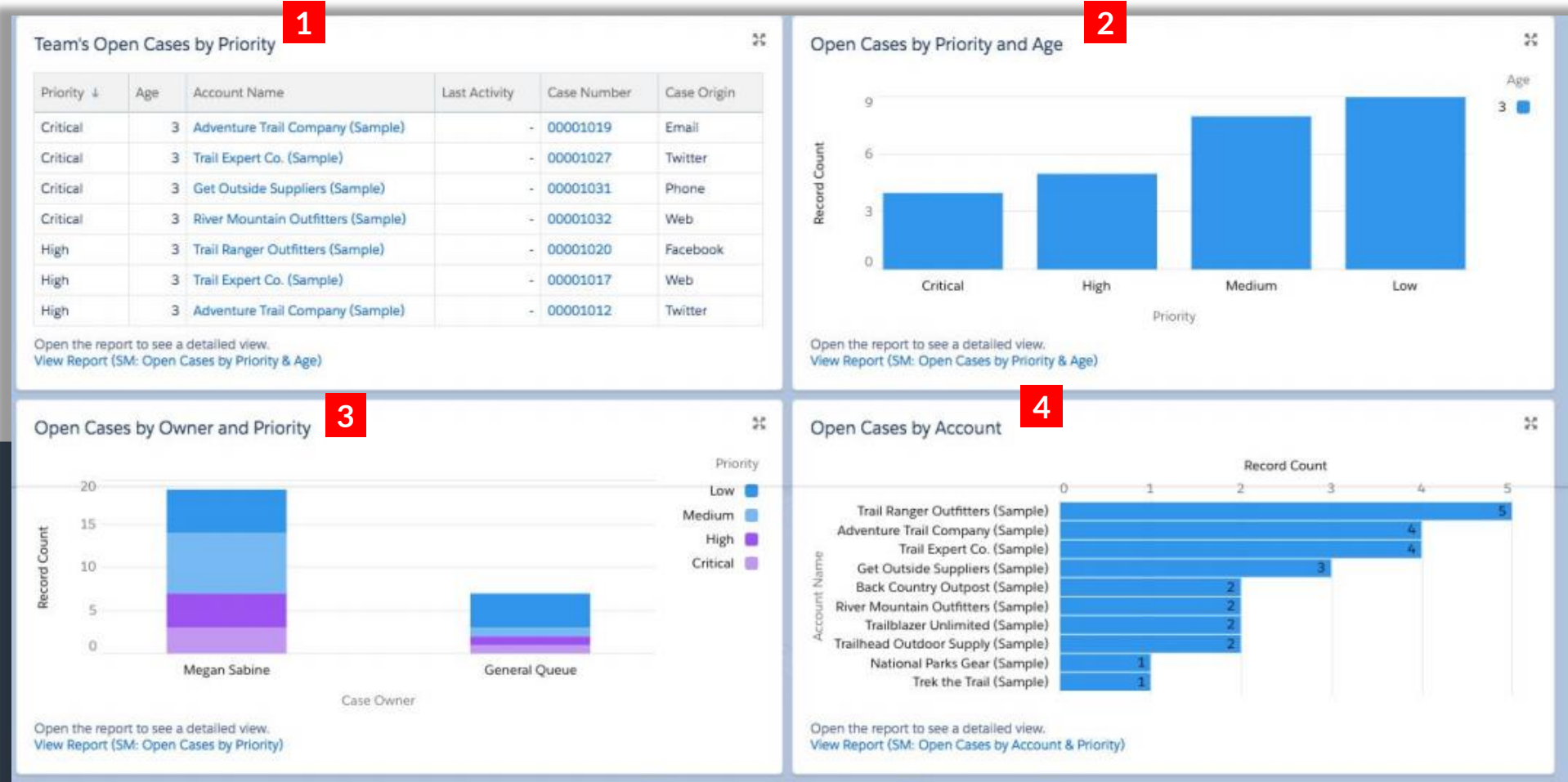
### 6. Escalated Cases by Account

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.

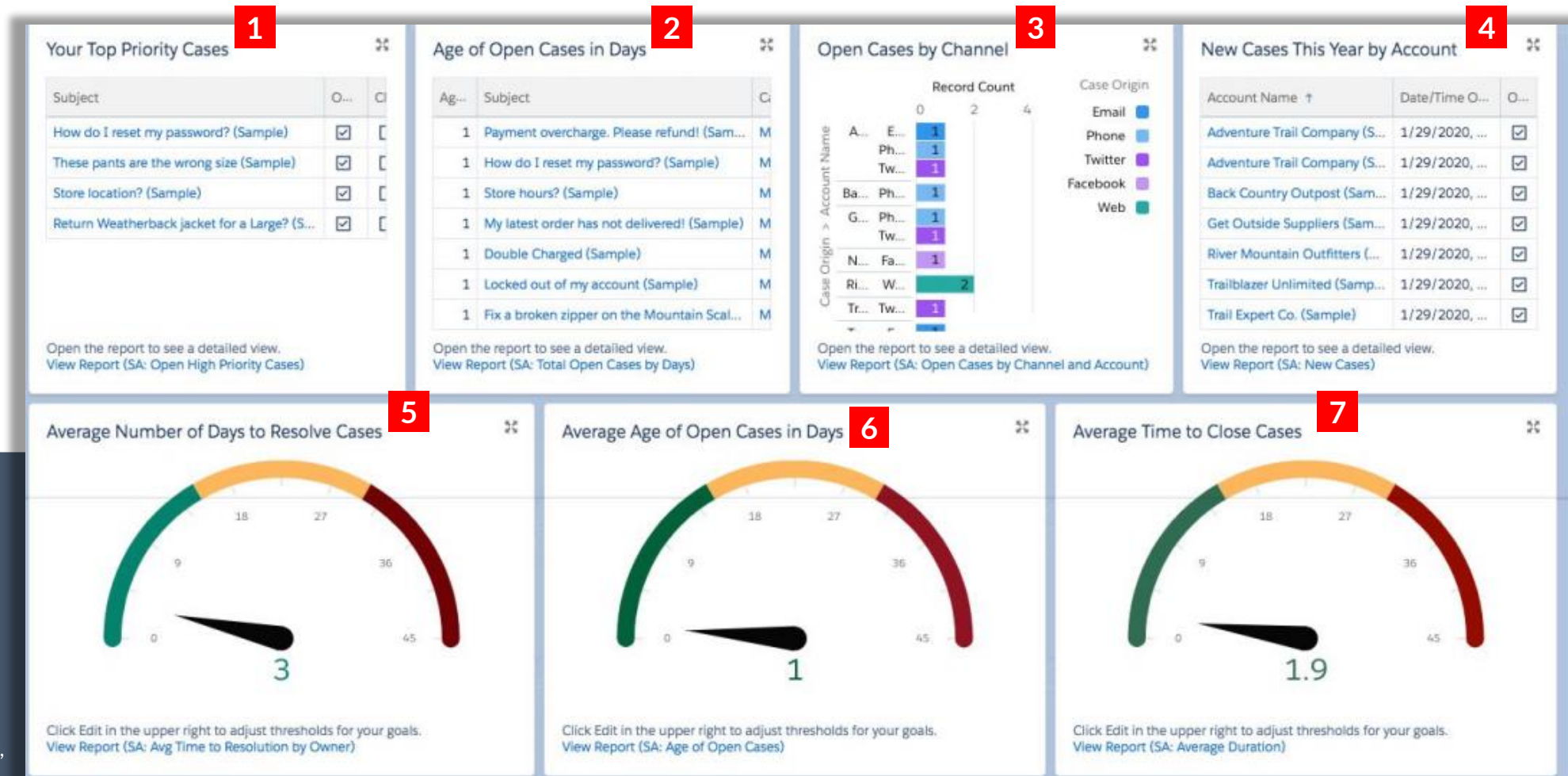
**3. Open Cases by Owner and Priority**  
Prioritize open cases by owner for better workload management.

**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.

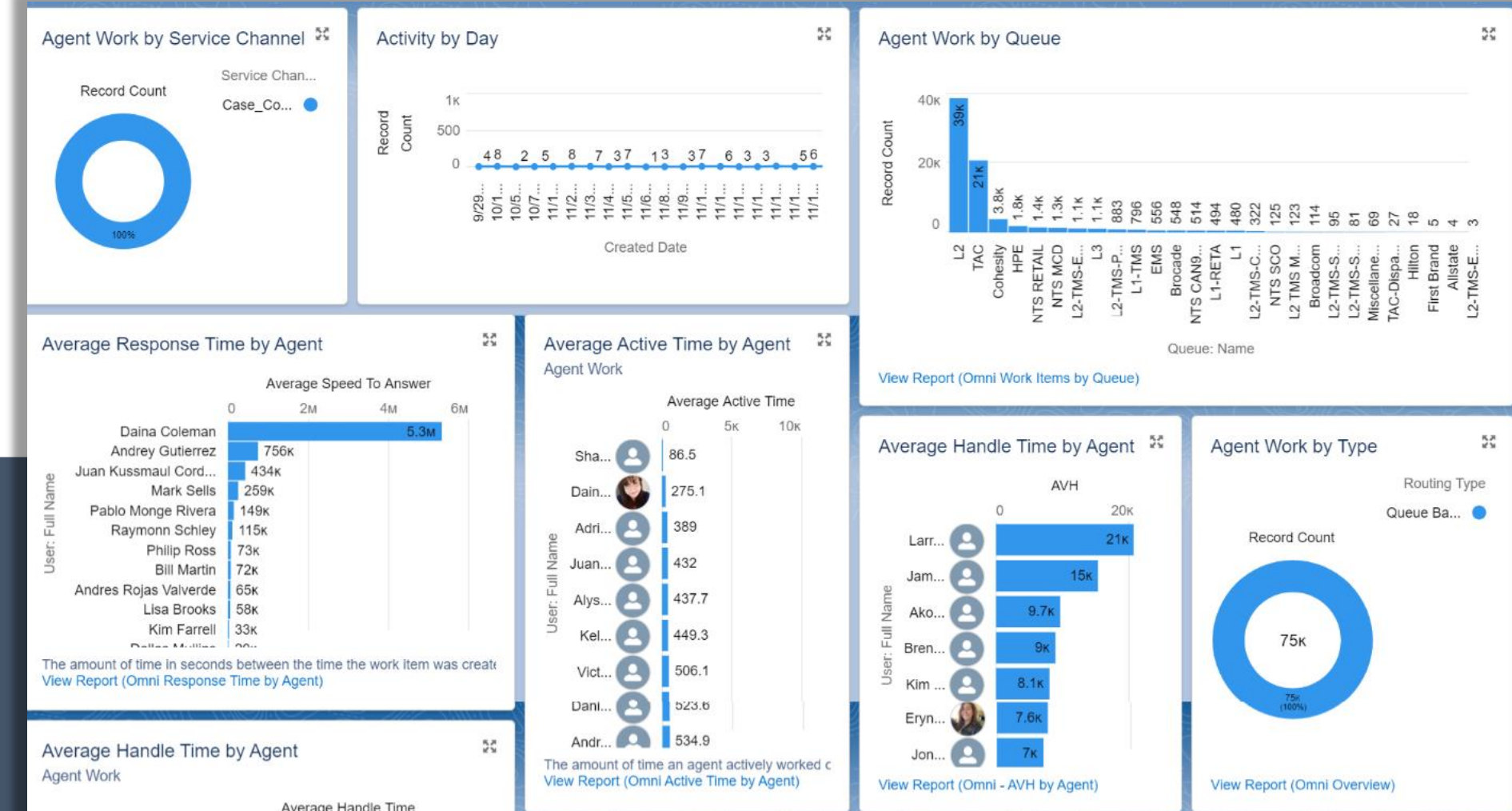
**6. Average Age of Open Cases in Days**  
Agents prioritize open cases for better workload management.

**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

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