



Fin Analytics, Taskus CX Summit

**The Operational Flywheel:
The Science of Continuous
Improvement for CX Metrics**

Outline

- ▶ **Trends in Measurement**
- ▶ **Modernizing Operations Measurement**
- ▶ **The Operational Flywheel Methodology**
- ▶ **Q&A**



Context (for some of the screenshots)...

Fin provides continuous and comprehensive measurement of team process, agent behavioral, and clickstream data.



We came to CX from consumer product background...

We have Venmo and Facebook product roots, and when we were building an on-demand executive assistance service, and wanted better tools for operational measurement.



Now, we help companies modernize their CX operations with workforce insights like...

- ▶ Your fully loaded cost of labor is **\$15 per hour**, but you're actually paying **\$31 per hour** of customer support case work.
- ▶ Chat time in **Slack** comprises **15%** of your total cost of labor.
- ▶ Team **efficiency** has improved **14%** after implementing Fin's daily productivity report with line managers at your site in the Philippines.



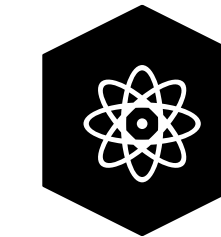
That's us, but this talk is about...

**A formal methodology for driving continuous
and repeatable improvement of customer
support KPIs.**



Why should you care?

Every other part of modern organizations leverage continuous measurement, feedback loops, and rapid iteration to optimize their decision making and execution process.



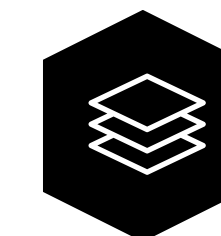
ENGINEERING TEAMS

pagerduty New Relic



MARKETING TEAMS

mixpanel Google Analytics



OPERATIONS TEAMS

Shadowing Time Studies

Fin Analytics



e.g. The Marketing Transformation

In 2000, teams only measured checkouts, awareness, and store purchases due to **limited traceability of customer behavior**.

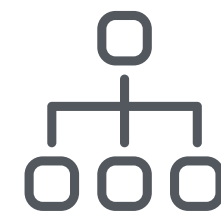
By 2010, full customer funnel analytics transformed marketing into a **data-driven science**.



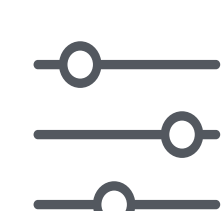
Retail Purchase
Tracking



E-Commerce
Tracking



Funnel Analytics
and Big Data



Marketing Spend
Optimization



Increased ROI
and Revenue



But, in customer support...

We still only measure outcomes. The state of the art in CX operations looks like marketing did twenty years ago.



The Cost of Waiting

Businesses spend a huge amount of time and **millions of dollars** every year investing in strategic initiatives to drive KPIs.



People

Training and Coaching



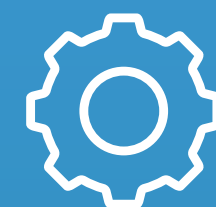
Process

SOPs and Canned Responses



Quality Assurance

Spot Reviews and Shadowing



Software

Tools and Automation

Think about your ideas from the 2020 roadmap...

Without full process data, the best you can do is make intuitive bets to drive your KPIs. You can't optimize what you can't measure.



And we can't take advantage of rapid iteration...

**The feedback loop for understanding
impact of process and tools change across
thousands of agents and is far too slow.**



Why Now?



New **tools and automation**

Support is a **huge percent of COGS** for consumer brands and services

Increased **customer expectations** for speed and quality of support

Rapidly shifting from brick and mortar to **e-commerce**

Leadership expects **data driven strategy** from every part of the organization

The Power of Reinforcing Feedback Loops

For consumer apps, the goal is to build a product where **the numbers keep moving in the right direction even if everyone goes home** and new product development stops.



How can we achieve similar results in contexts where **people on the front lines are essential** to our service?

In CX and service operations, if everyone goes home, service stops.

The analogous goal is a system that continues improving **without new strategic investment**.

Key question...

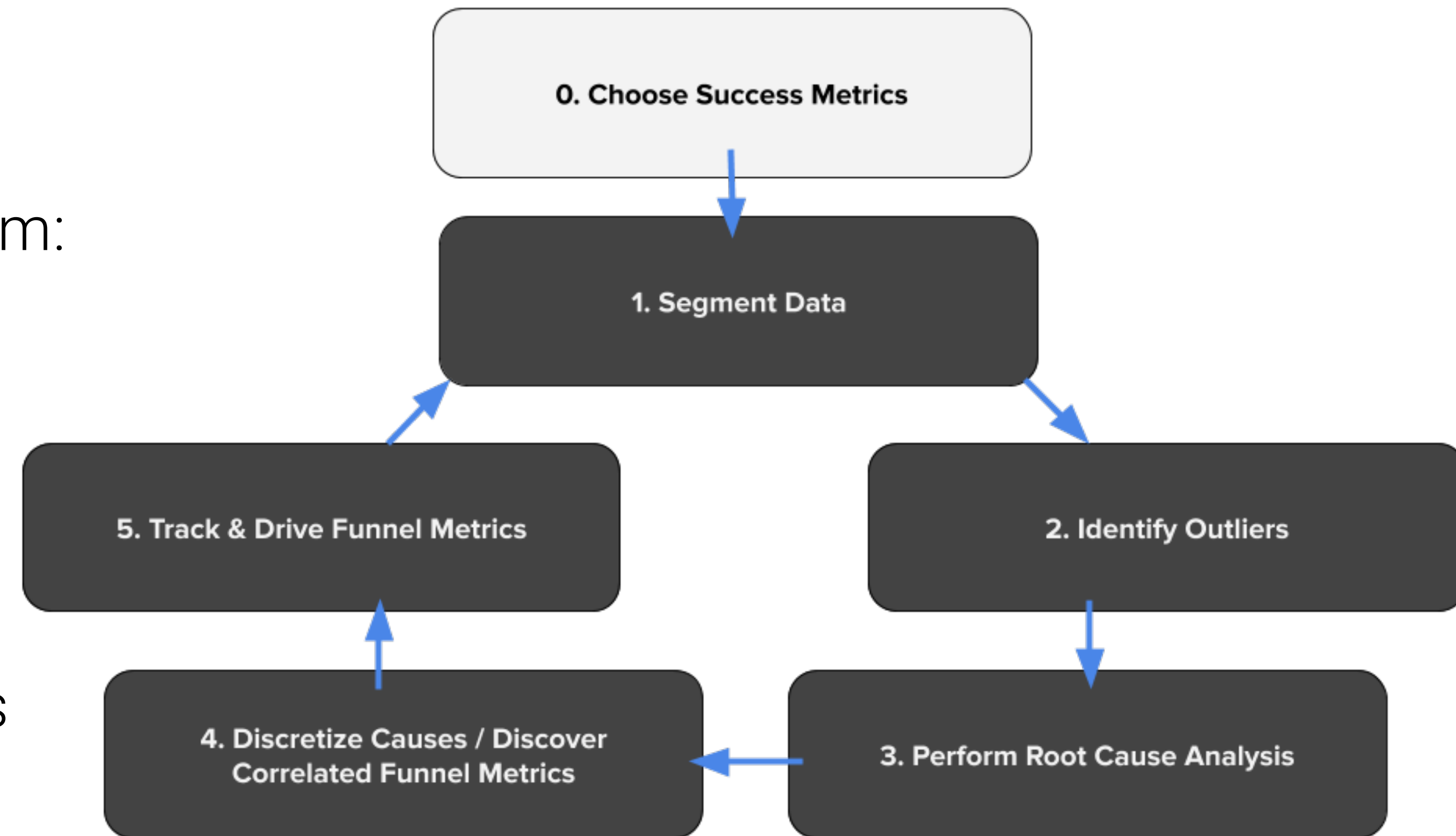
**Is your organization prepared
for modernization and full-
stack measurement?**



The Operational Flywheel Methodology

A formal methodology for **continuous improvement** developed by the Fin Team:

- ▶ To run our own large operations organization in the US and Manilla
- ▶ Working with dozens of best in class CX teams to optimize their operations



These principles **enable rapid iteration** and increase your organization's ability to achieve its goals.

Now, let's get more specific and look at the flywheel in action driving **CSAT**.

The same process works for Cost per Resolution, etc.

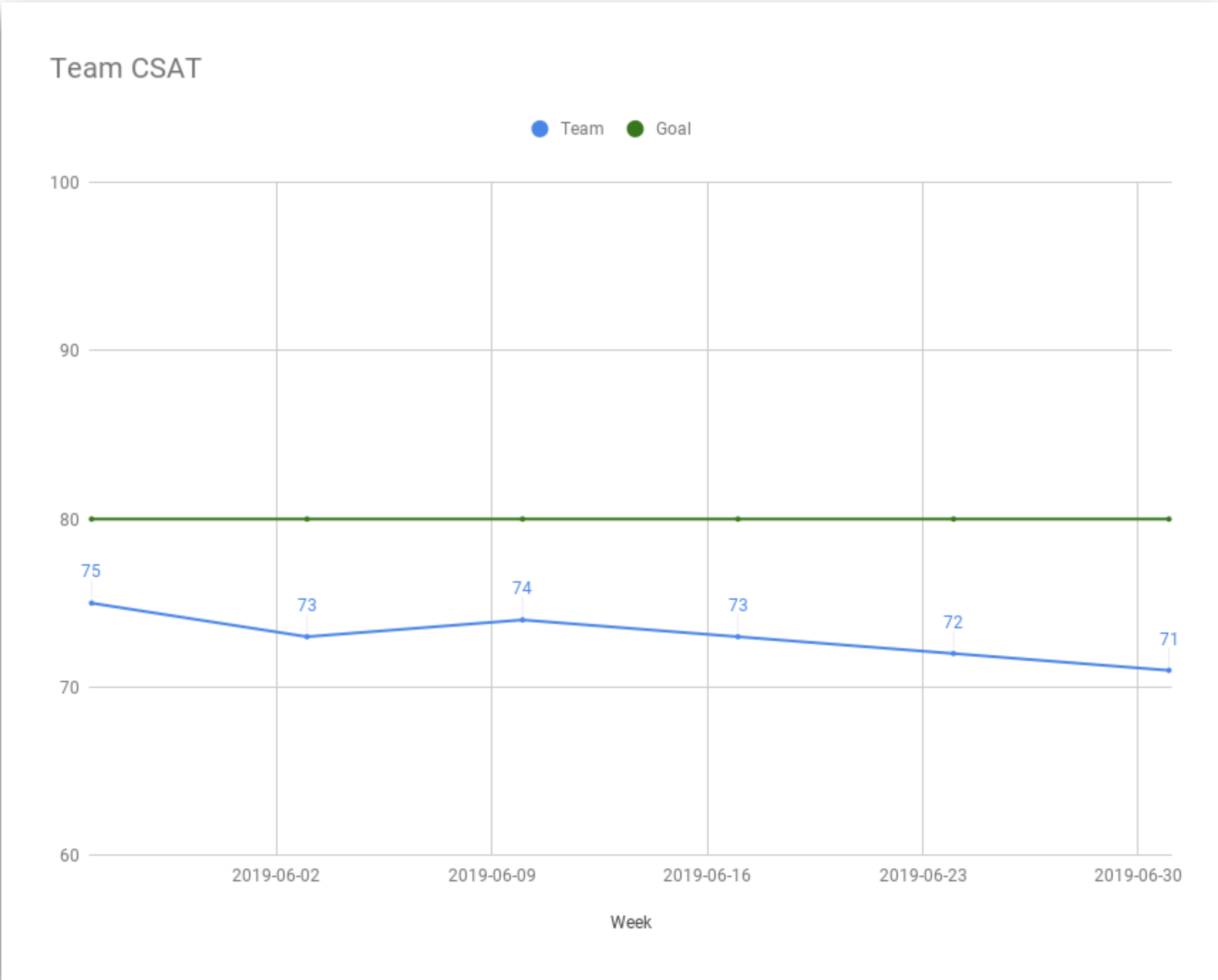


0. **Choose Success Metric** / 1. Segment Data / 2. Identify Outliers / 3. Perform Root Cause Analysis / 4. Discretize Causes / 5. Track and Drive Metrics / 6. Repeat

Choose Success Metrics

You've already decided how you measure key business indicators of efficiency, cost, and utilization, so this is done!

Take CSAT from 71 to 85.



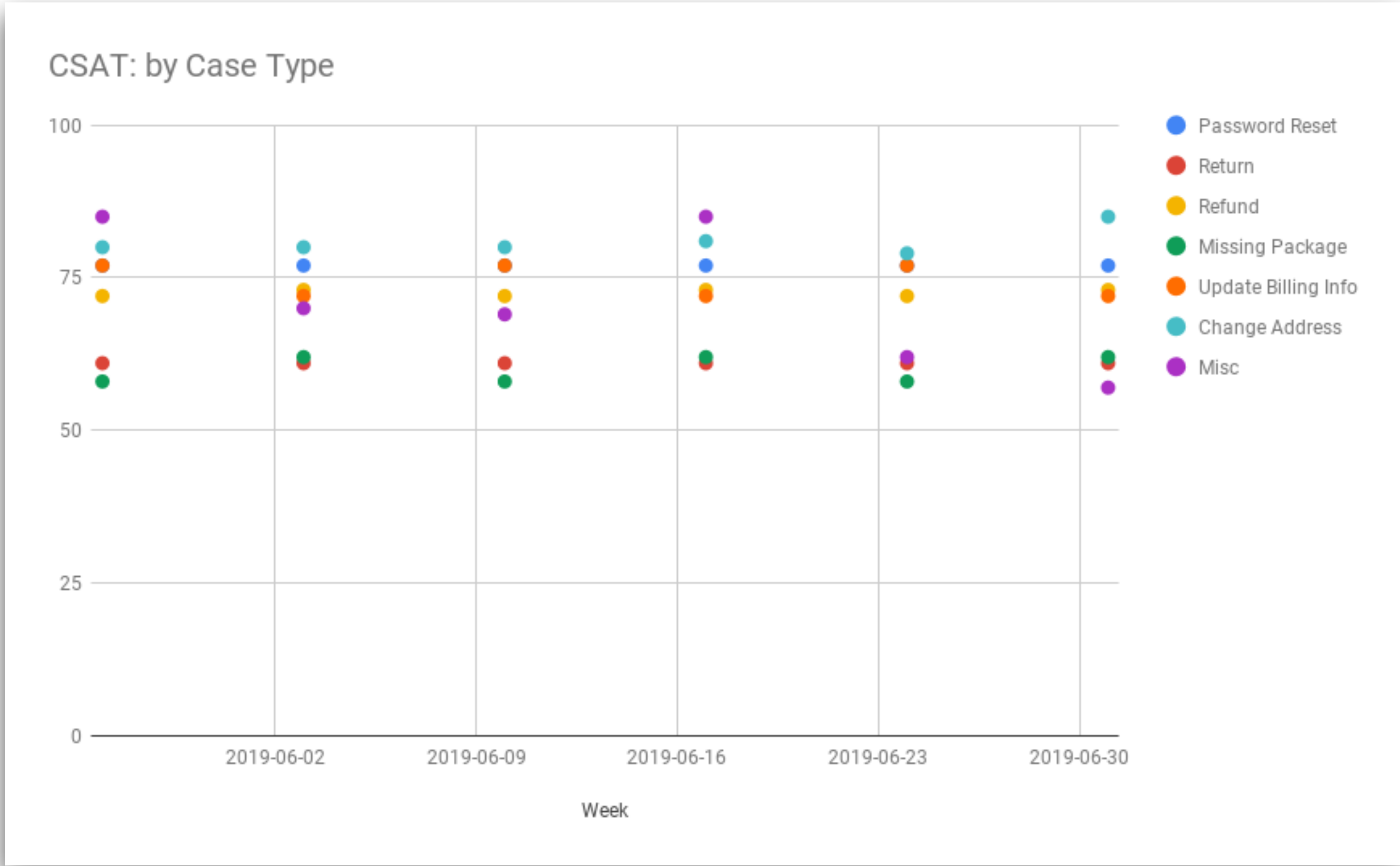
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Segment Data

This helps prioritize your biggest opportunities and ensure your team focuses on the highest impact areas.

Segmenting by Case Type reveals opportunities in:

- Missing Package
- Return

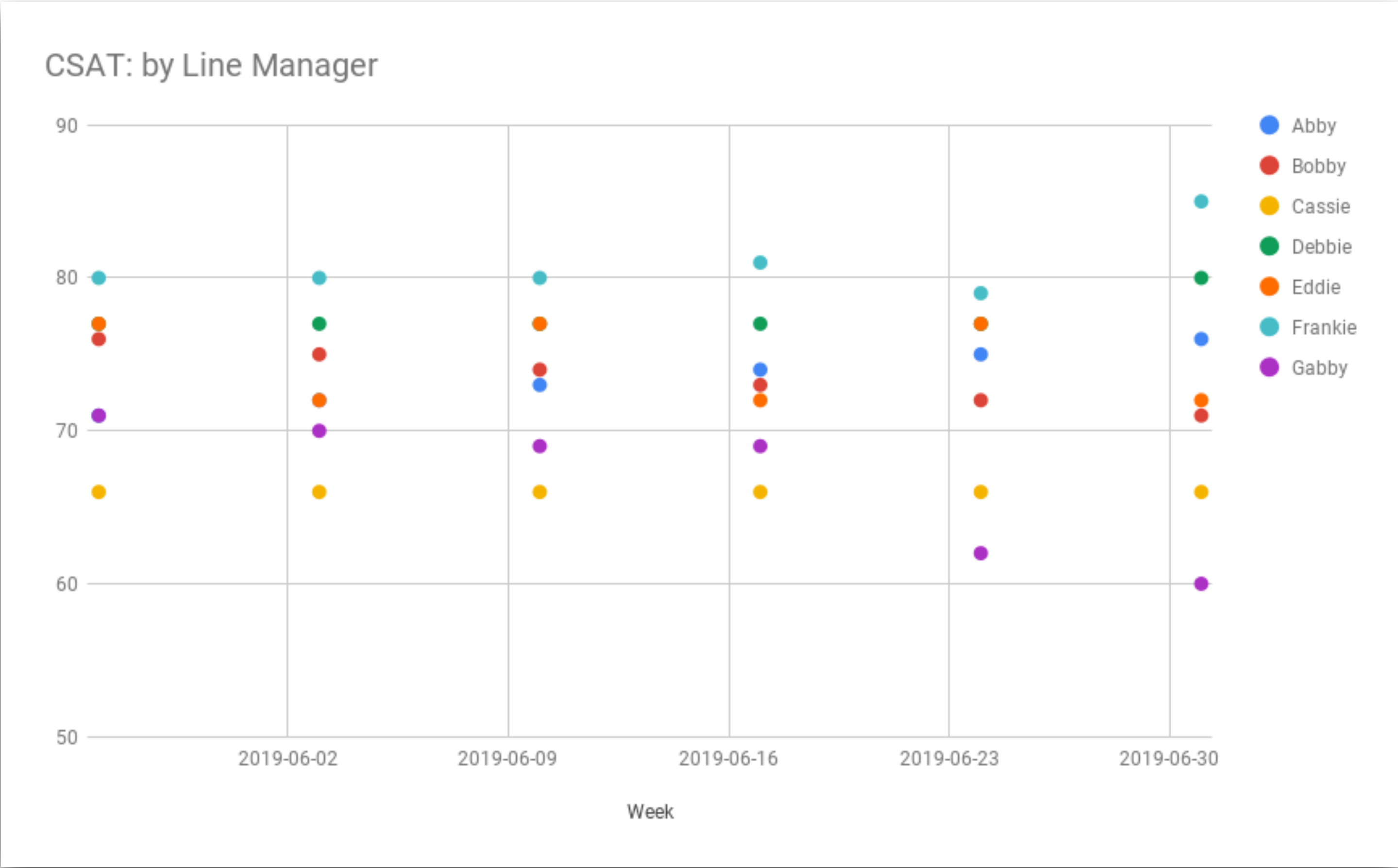


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Identify Outliers

What individuals, managers, sites, or shifts contribute disproportionately to low CSAT scores within each segment?

Cassie & Gabby's reports are struggling.
Frankie's agents are great. What can we learn from her?



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Perform Root Cause Analysis

Understand causes for failure and what drives outliers in performance.

Tip: Don't rely on random review.

Tip: Use video to drive QA efficiency.

The screenshot displays a video player interface for a support ticket analysis. The main display (DISPLAY 1) shows a support ticket for 'Sample ticket: Meet the ticket' with a public reply from 'Rei-Ling Hudson' and a customer response. A smaller display (DISPLAY 2) shows a code editor. The video player includes a timeline at the bottom with 'Page Visits' and 'Case Sessions' tracks, and a control bar with 'Auto-switch active display' and a 'Fin Exploration Co. - Agent' tooltip.

Rei-Ling Hudson

Add an annotation

Used an outdated resource. Remember to search our knowledge base next time!

Tags

Procedural Error

At Time

01:01:03 PM

Annotate

Make a shareable clip

Make Clip

Link to this video time

04/04/19 @ 1:01:03 PM

<https://analytics.fin.com/dashboard/us>

Copy Link



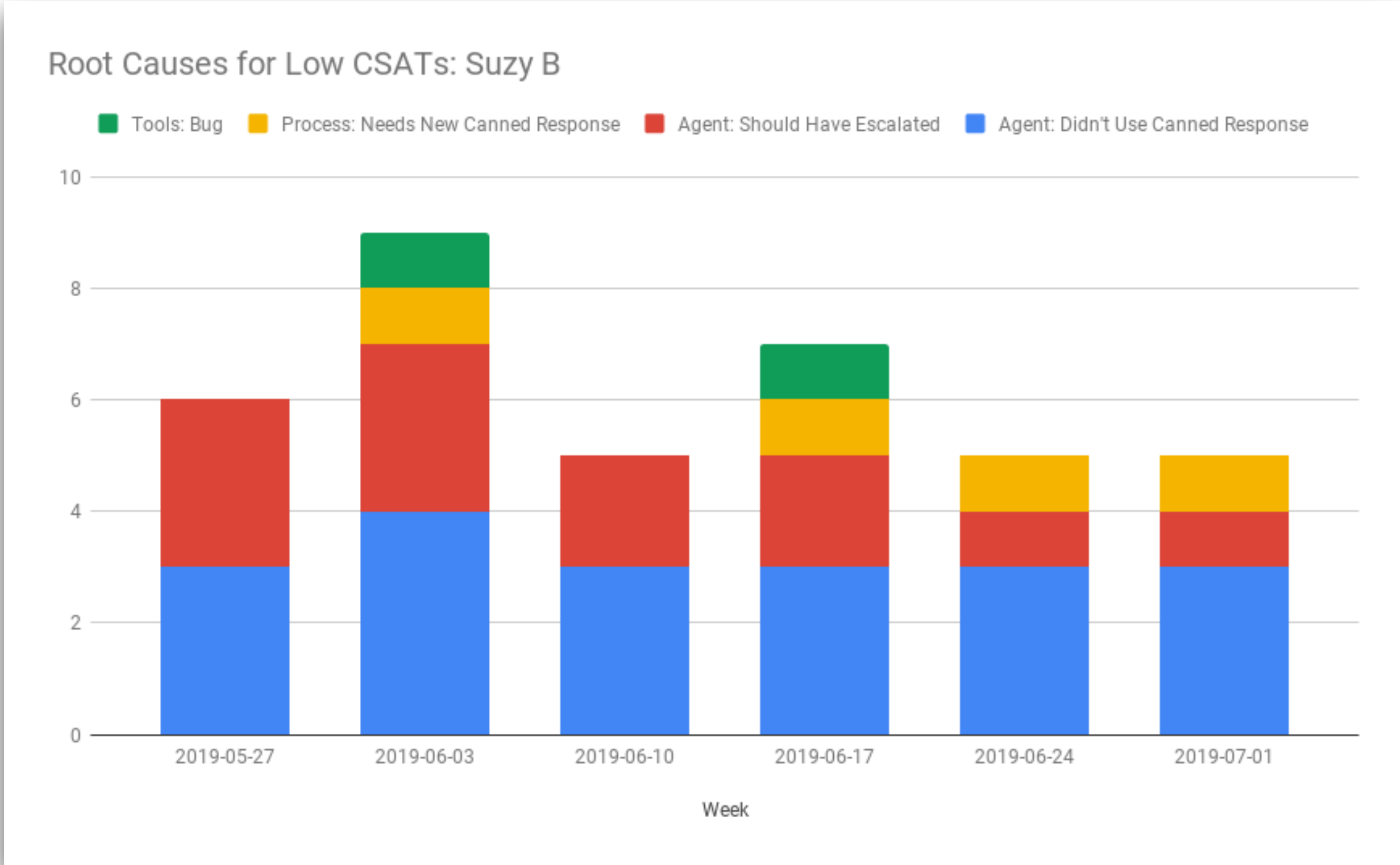
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Discretize Causes

Uncover the hidden problems holding your team back.

Is there an individual performance issue?
Is there an inefficient process?
Is there a broken tool?

Tip: Properly assign responsibility!

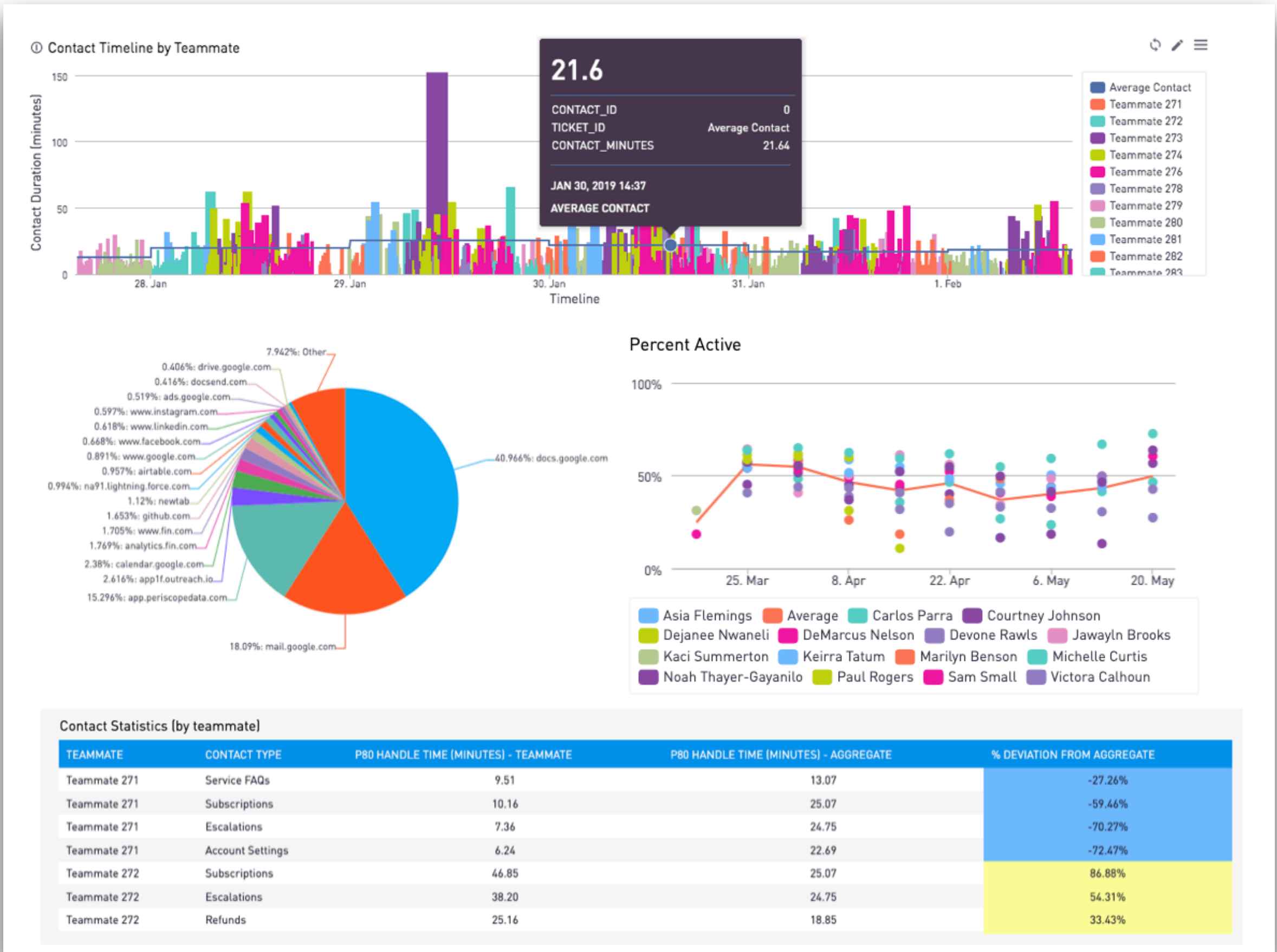


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Track and Drive Funnel Metrics

Prioritize the most frequent and costly team issues.

Tip: Use videos like 'game tape' for personalized coaching and training.



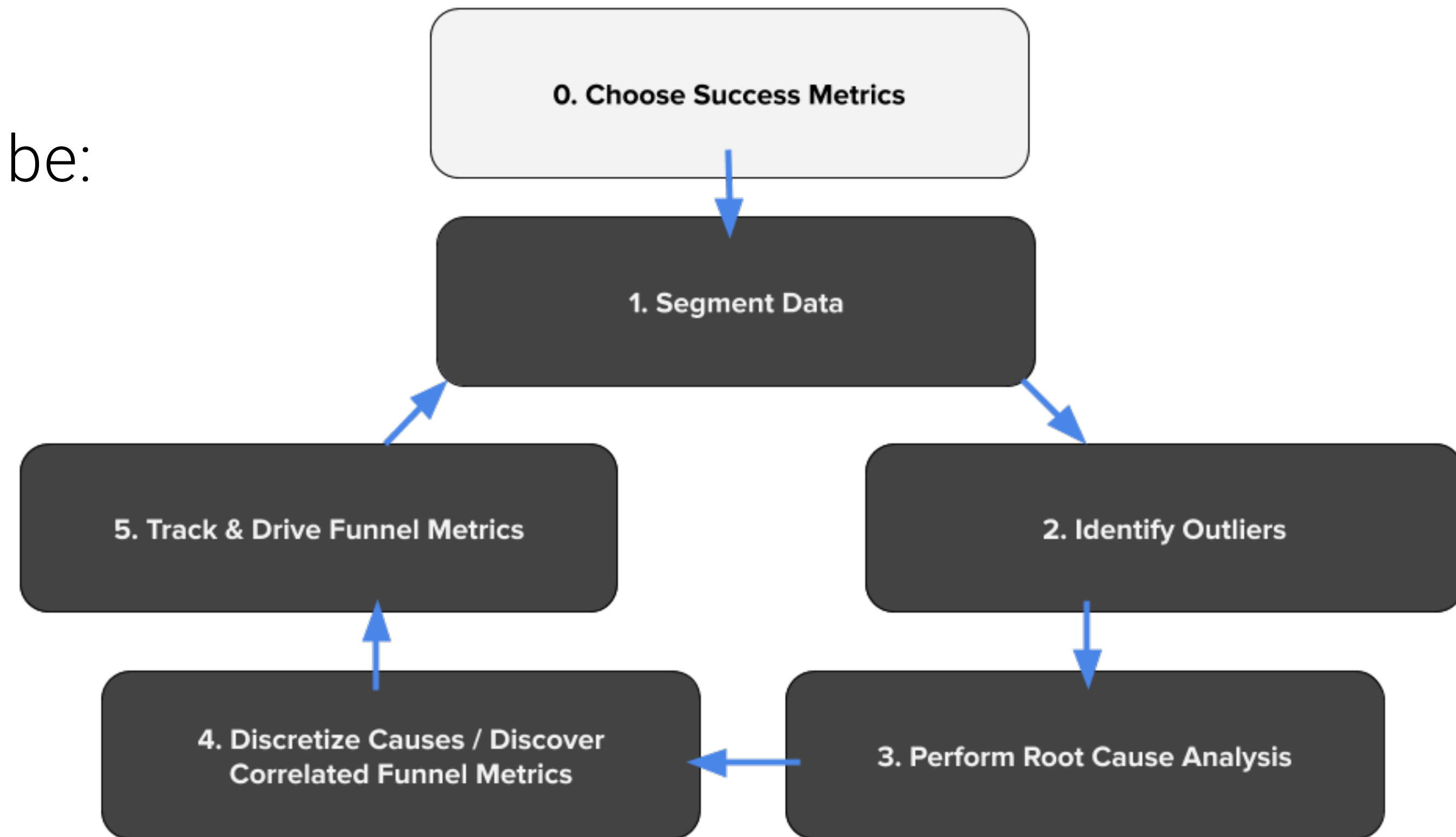
1. Segment Data / 2. Identify Outliers / 3. Perform Root Cause Analysis / 4. Discretize Causes / 5. Track and Drive Funnel Metrics / **6. Rinse and Repeat**

Rinse and Repeat

The operational flywheel is designed to be:

- 1. Measurable
- 2. Repeatable
- 3. Continuous

Find the next biggest opportunity and go back to step one.



The digital transformation is happening...

Leveraging data to make continuous improvement a science will be the biggest opportunity in operations over the next five years.

