Customer Service KPI Guide

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As a growing e-commerce store, it's tough to know if your customer service process is working well. Maybe your agents are complaining that they're too busy and can't handle more workload. Or perhaps you wonder if you're overstaffed and can run a bit leaner to boost profits.

By tracking just a few metrics consistently over time, you can turn your customer service team into a dialed customer satisfaction machine. You can ensure you have just the right agent workload and that agents are providing a great visitor experience. Once you have this process dialed in, you can use these metrics to forecast future changes for customer service.

Measuring Customer Experience

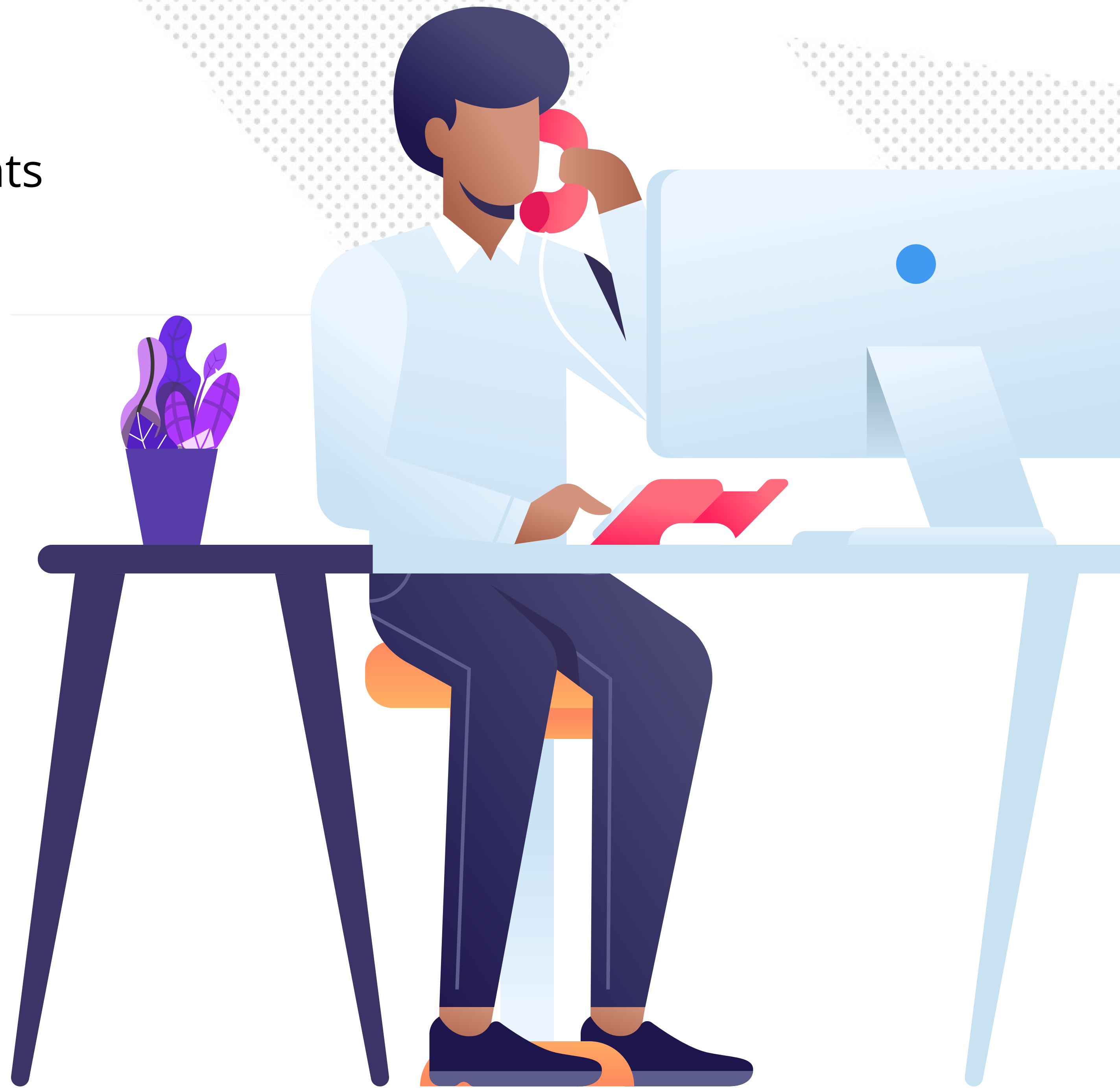
The most important part of customer service is making sure to provide a good experience for customers. Not only is this the right thing to do, but it will grow the value of your customer base over time.

You can quantify a great customer experience using just a few metrics:

1. **First Response Time** - When a customer sends in a support question, the first response time is the time it takes for one of your agents to reply. It may take time to resolve the question, but a fast first response time lets the visitor know you are handling it.
2. **Resolution Time -** Resolution time is how long it takes from the time a visitor sends in a ticket to the time the ticket is fully resolved. Balancing a fast response time with a reasonable resolution time leaves visitors feeling taken care of the entire time.
3. **Customer Satisfaction -** Once a ticket is resolved, you can gather a rating from customers on their satisfaction with the outcome. By tracking this over time, you can gauge how happy visitors are with the result, including if they feel it was handled in a timely manner.

Measuring Agent Performance

The customer experience metrics mentioned earlier directly impact customer experience. But to provide a great customer experience, you need to ensure your agents are working effectively and performing well.



1. **Agent Capacity -** Agent capacity is measured by the amount of tickets per day each agent handles. Over time, you can benchmark the appropriate ticket capacity that agents should be able to hit. If agents are at the appropriate ticket capacity, but you still have more tickets coming in, that is a sign that you need more agents. They are, in fact, “too busy” to handle more.
2. **Handle Time -** Handle time is the amount of time it takes an agent to process a ticket. Different types of tickets will have different handle times, but again comparing this on an agent by agent basis to the benchmark will help you identify agents that are not working efficiently enough.
3. **Customer Satisfaction -** Again, the most important metric in customer service is customer satisfaction. By measuring customer satisfaction on an agent by agent basis, you can identify agents that are not up to par with other agents–which is usually an indication of working too quickly or possibly a bad culture fit for helping customers.

By tracking efficiency metrics along with the customers’ view of how a ticket was handled, you can find the right balance between efficiency and customer satisfaction.

Reporting Cadence

Once you are tracking the customer and agent metrics above, it's important to monitor these over time. This will help you identify trends of when metrics are going in the wrong direction so you can take action.

We've run a lot of different customer service teams, and the below cadence seems to work best:

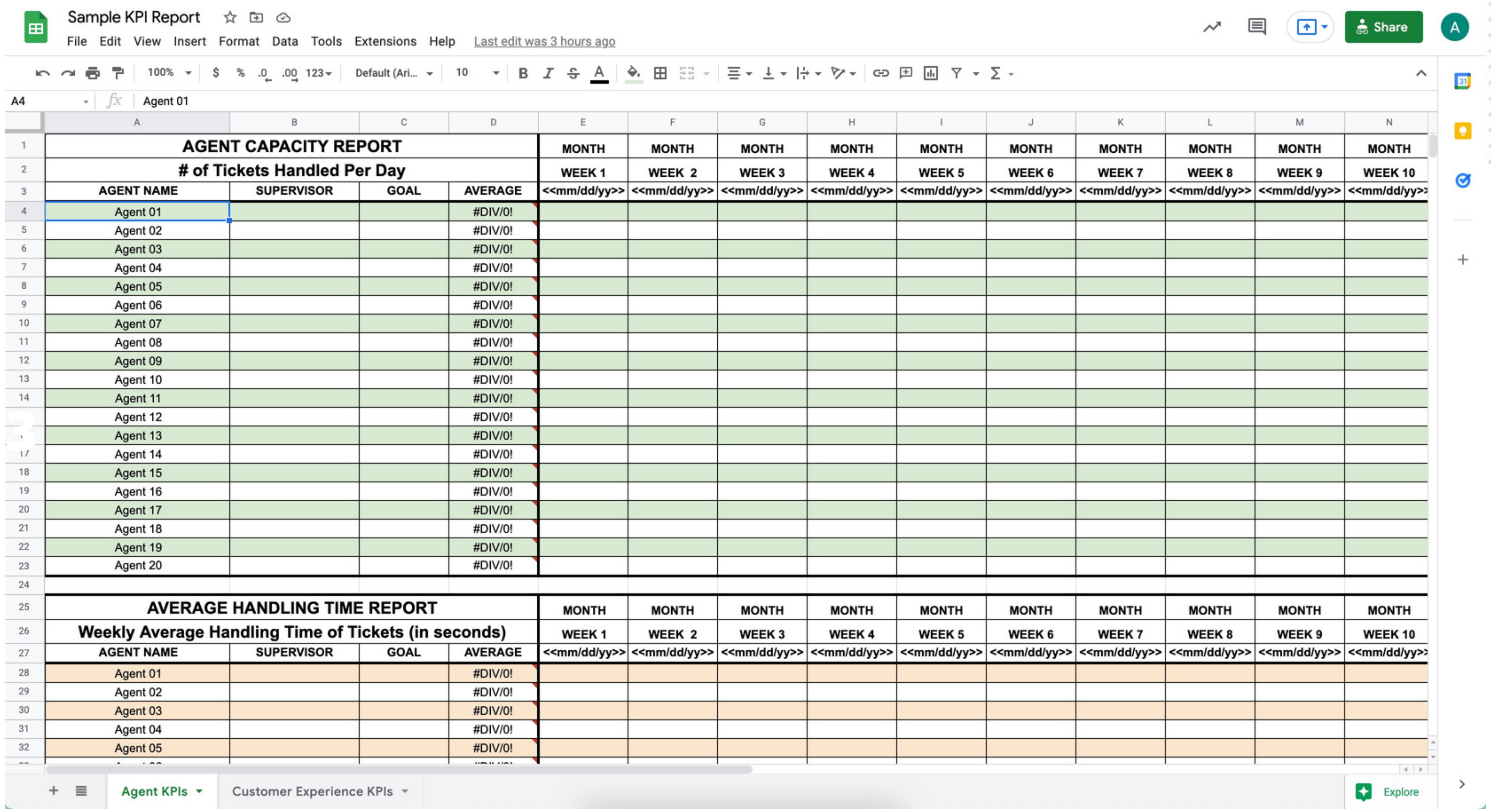
1. On a weekly basis, have your team compile the metrics and make it part of your weekly team meeting.
2. Track team level metrics in a simple spreadsheet so you can see trends for each metric over time. Having your team leader compile these metrics on a weekly basis also builds accountability.
3. Watch for trends of metrics that fall out of benchmark thresholds, along with trends over time for specific metrics and how metrics are related to each other.

By having a simple but on-going reporting cadence, you can ensure you have a firm understanding of how customers are being taken care of and improve that over time.

How To Use The Report

To make things easier for you, we created a similar report to the ones that we use to track our KPIs. Open the [sample report here](#).

1. Create a copy of the report on your Google Drive. Click on File then Make a Copy.
2. The report is designed to record actual numbers on a per agent basis every week. Type in the agent name.
3. If you have multiple teams, entering the name of the Supervisor is helpful when comparing team numbers.
4. Enter your actual numbers every week. From there, analyze trends and patterns on the numbers.
5. More importantly, use the numbers to gauge CS performance and create action plans to improve CS.



AGENT CAPACITY REPORT				MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH
# of Tickets Handled Per Day				WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8	WEEK 9	WEEK 10
AGENT NAME	SUPERVISOR	GOAL	AVERAGE	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>
Agent 01			#DIV/0!										
Agent 02			#DIV/0!										
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AVERAGE HANDLING TIME REPORT				MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH	MONTH
Weekly Average Handling Time of Tickets (in seconds)				WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8	WEEK 9	WEEK 10
AGENT NAME	SUPERVISOR	GOAL	AVERAGE	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>	<<mm/dd/yy>>
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Agent 02			#DIV/0!										
Agent 03			#DIV/0!										
Agent 04			#DIV/0!										
Agent 05			#DIV/0!										

WHAT TO DO NOW?

It’s important to know your numbers and have a weekly review and even a quarterly retrospective routine. In the early days of a business, you can wing it with these things but once you hit a certain scale they become a make or break factor for you to get to the next level. As a next action:

- Implement and track the basic KPIs mentioned in this guide. Use the numbers to guide you in gauging CS performance and CS improvement plans in the future.
- Later on, when everything is stable, you can add other KPIs that you think are important for your company like Quality Score (if you have a Quality Team evaluating your agent transactions), Schedule Adherence, Training Adherence, etc.
- You can also integrate performance incentives to further boost your team in achieving their individual and company KPI goals.

Book A Strategy Call

At HelpFlow, we provide 24/7 live chat and customer service teams to over 100 e-commerce stores (i.e. our agents answer visitor questions on chat and handle email tickets, 24/7). If you want to dig in to your own CS operation, book a Strategy Call with our team.

Even if we don’t work together, you’ll get a lot of insights you can apply from the audit since we’ve worked with so many stores.

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