



Data Reporting

Finding Meaning Through Reporting

By Susan Campbell, Vera Bradley

In midst of the COVID-19 pandemic, when so many questions remain unanswered, data has been one of the only truths society has been able to use to make decisions. Scientists, medical professionals, government officials, and the general public have been tracking the rate of spread, geographical location, confirmed cases, deaths, and so on. Data has never been more relevant in our lives.

No one ever believes reporting can be inspiring, but it actually can be! The knowledge gleaned from even the simplest reporting can be empowering, leading to organizational efficiencies, customer satisfaction improvements, employee engagement, and even profits. In 1597, Sir Frances Bacon said “Knowledge is power,” so this is not a new concept. Sharing data is paramount to organizational success. In *The End of the Competitive Advance*,

How to Keep Your Strategy Moving as Fast as Your Business, Rita Gunther McGrath discusses how Sanjay Purohit, the head of strategy for Infosys, explains that there is no concept of hidden data in the company—everything is transparent to the business units as it is to corporate, and there is only one version of the truth. Purohit says, “Our chairman has a great phrase for this. In God we trust, everybody else brings data.”

Still not convinced? Here's why you need to implement or refine your reporting.

Reporting creates ownership. Access to reporting leads to empowerment. It doesn't take long for team members who have access to reporting to begin to ask questions; it opens healthy dialog to have “how” and “why” conversations. Empowerment can lead to individual contributions at a higher level. We have been able to raise department productivity over 10 percent with simple awareness. Our



customer service representatives did not realize how much time they were putting themselves “away from desk” until we shared the report on their dashboard. Many of them were astonished. One simple efficiency translated to being available for our customers 10 percent more frequently. Ownership happens to be one of our organizational focuses. Last year, we launched a work from home program for our customer service representatives. This was a new concept, and there were various concerns when we began to share the structure of the program. The first concern was our culture. How do we maintain our amazing culture when full-time

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team members have the ability to work from home? How can anyone be as productive at home as they are at work? We launched the program as a pilot. To participate in the program, our team members had to be “certified.” They had to provide proof of sufficient internet service, provide photos of their office workspace, and maintain an approved productivity. We were surprised at our original results. The reporting showed that our team members working from home were actually more productive! At first, we thought perhaps it was an anomaly, but month after month, the results were the same. We’ve also maintained our culture. All of our team members are invested in the program. They want to



continue to work from home and therefore, they want to be successful. It's a win/win that would not be possible without accurate, trusted reporting.

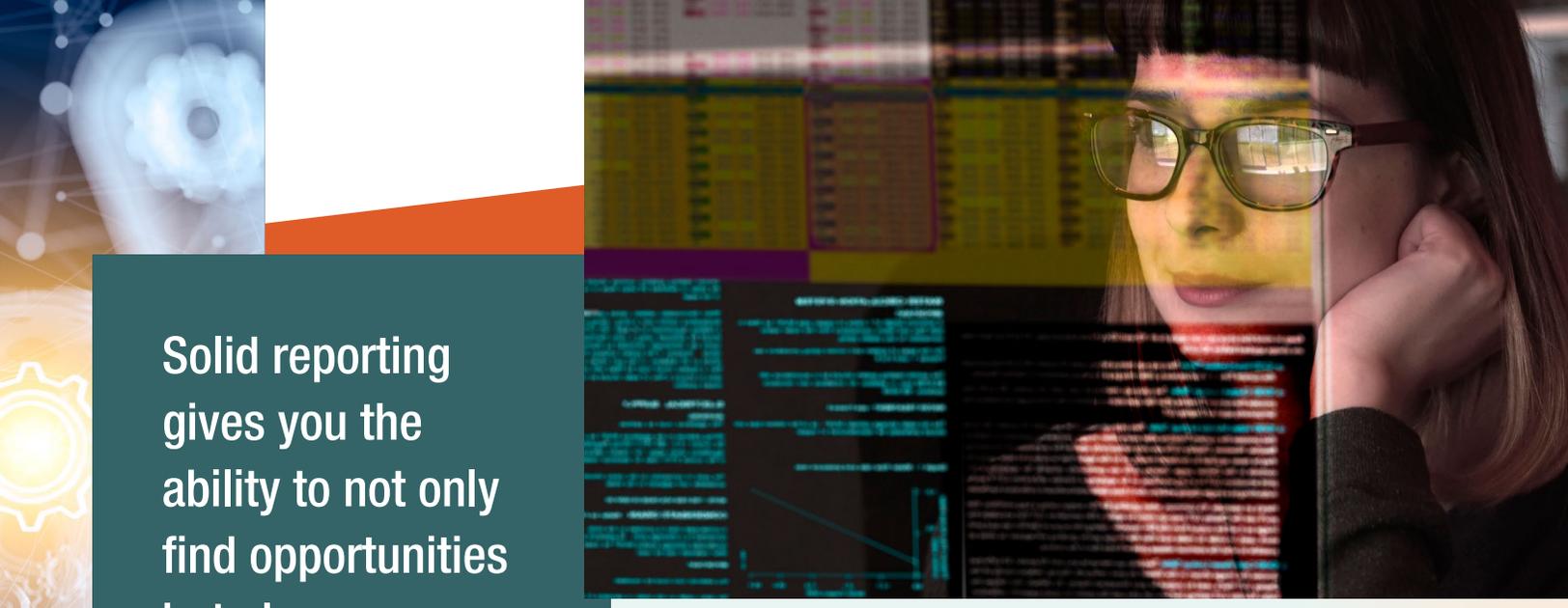
Alignment of company objectives. Collecting the data is important; however, communicating the data is equally important. Start with casual conversations if your culture is less formal. It's important to interpret the data, and there's no better way than to talk through details with co-workers. Everyone has a different perspective and priorities, even within your own department. The data will give you the opportunity to find the gaps and opportunities within your organization. The sooner you can begin to interpret the data, the sooner you will be on your way to make business improvements. It's only natural at times to challenge the data. These challenges can lead to more data and more analysis and ultimately improve a process by making it more efficient.

One point of truth. Reporting gives you the ability to find meaning in what you are doing. The numbers do not lie. One of our organizational goals is Customer Satisfaction (CSAT). We monitor it daily, passing feedback and suggestions along to departments that can make an

impact. Then we take it a step further, monitoring CSAT before and after a change in process or experience. For example, we started to see a drop in CSAT whenever a specific promotion was mentioned in one of our distribution channels. We updated the language on the promotion, and our CSAT grew 14 points within 30 days. The point of truth that reporting can give us can validate success. How many times have you spent hours working on a change, but you don't really have a way to know if it made an impact? Solid reporting gives you the ability to not only find opportunities but also measure success.

Here's what you need to get started creating a focus on reporting in your organization.

Simple is best—agree on what metrics are the most important to your culture. Review your organization's mission, vision, goals, and strategies. In our Contact Center, we look at average handle time (AHT), but we do not use it as a metric for our customer service representatives. Paramount in our culture is a need to solve the customer's issue no matter how long it takes. There are situations when a customer wants to share her recent



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experience or a story regarding her product and we believe those moments are equally important to placing a new order. Although we do not count AHT toward any of our metrics, we still do monitor them. Surprisingly, we realized our “sales” calls actually take longer than our “service” calls. This led to some technology improvements to create time efficiencies for customers placing an order. Even if it’s a metric you are not using for efficiency, it still may be an important data point for your reporting. It can lead to finding a potential improvement or even a situation when you know that further analysis is needed.

Interpreting the data—collaborate on the reporting interpretation. This may sound nebulous, but there are various ways to read even the simplest of metrics. Take, for instance, abandonment. You will need to determine if you want to include pre-queue abandoned calls. In sales data, do you want net sales, gross sales, or both? I recommend both. This will ensure consistency throughout the organization. And remember, it’s ok to continue to refine your reporting again and again as you learn and communicate the results.

Share the findings every way you can—to everyone who will listen and celebrate the positives. It is important to know your audience and what information is important to various roles within the organization. Your boss, CEO, and CFO will likely all request different information. What information can you share that would help with their strategic objectives? Is there an elevator speech you can prepare for your boss attending a meeting or a conference? CSAT and Net Promoter Scores (NPS) are monitored daily as a way to gauge everything from successful in-store training, ecommerce experience, customer service experience and even order fulfillment. These metrics can shape policy in a matter of hours. When

creating dashboards or reports, ask for feedback. If your department reports into Sales, it may be different from your department reporting into Marketing. It’s important to determine your priorities.

What are the next steps?

If you want to introduce some simple reporting into your organization, network with another business. You may have a local company in your area that you have always wanted to learn more about, and it’s easy to learn from the processes they already have in place. Ask any of your account managers if they could recommend someone—maybe your case management system, survey tool, or telephony solution account manager. Professional groups (e.g., SOCAP) will also help you find a good match to achieve your objectives. Once you begin the benchmarking process, your reporting will continue to evolve and improve. There are so many ways you can introduce or reintroduce reporting to your organization. **CRM**



Susan Campbell is the customer experience director at Vera Bradley, responsible for managing the Customer Service Organization and Contact Center and providing strategic vision and exceptional customer experience through phone, email, SMS text messaging, and live chat in support of strategic business goals, sales goals, and objectives across all channels. She is responsible for developing and maintaining customer loyalty metrics, response strategies, satisfaction indexes, quality assurance measurements, and program effectiveness to drive performance and improvements to the customer experience, and for supporting enterprise-wide goals and VoC (Voice of Customer) advocacy. Susan has a B.S. and an MBA and a geeky passion for data.