Oracle

Engagement Cloud
Subject Areas for Transactional Business Intelligence in Engagement

13 (update 18C)
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What is the breakdown of open action plans by category?  

How many action plans are open and how long have they been open?  

Are we responding to customer messages in a timely manner?  

Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?  

What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?  

Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?  

How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?  

Are there currently service requests that have missed the target milestone and require escalation?  

Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?  

Are our processes inefficient or preventing agents from meeting milestones?  

Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?  

How does my team perform in meeting first response milestones versus resolution milestones?  

What is the % of open SRs with milestones, that is, have at least one milestone?  

What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?  

By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?  

As an agent am I spreading myself too thin by being part of one too many SR teams?  

What are the open critical SRs that my team is working on currently? How many of these are escalated?  

How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?  

What are the SRs that are waiting on my customers?  

Who are my agents that have the most pending SRs?  

How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?  

What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?  

How does the aging profile of SRs look like? Are there any outliers calling for intervention?  

How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?  

How many social posts are we receiving over time?  

What is the current count of inbound social requests by status and social channel?  

How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?  

How many social posts came from known versus unknown contacts?  

Is the Service organization effectively handling new social service requests in the appropriate timeframe?
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons

? to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the Oracle Help Center to find guides and videos.
- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
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<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
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<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons

? to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

• Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
• Guides and Videos: Go to the Oracle Help Center to find guides and videos.
• Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
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<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction

Subject Areas: Overview

This guide contains information about Transactional Business Intelligence subject areas, their associated job and duty roles, and the business questions that they provide answers to. For your reference:

- Subject areas are the building blocks of your analytics and reports based upon them. Analytics are built by choosing an appropriate subject area that has information that answers the business question you’re analyzing. Technically, subject areas are a grouping of information pieces called data objects that relate to each other in a particular context.

- Job roles are associated with duty roles, and together control access to subject areas.
2 Subject Areas

Overview

This chapter provides information on the subject areas with data you maintain in Oracle Engagement Cloud. These subject areas, with their corresponding data, are available for you to use when creating and editing analyses and reports. The information for each subject area includes:

- Description of the subject area.
- Business questions that can be answered by data in the subject area, with a link to more detailed information about each business question.
- Job roles and duty roles that can be used to secure access to the subject area, with a link to more detailed information about each job role and duty role.
- Primary navigation to the work area that is represented by the subject area.
- Time reporting considerations in using the subject area, such as whether the subject area reports historical data or only the current data. Historical reporting refers to reporting on historical transactional data in a subject area. With a few exceptions, all dimensional data are current as of the primary transaction dates or system date.
- The lowest grain of transactional data in a subject area. The lowest transactional data grain determines how data are joined in a report.
- Special considerations, tips, and things to look out for in using the subject area to create analyses and reports.

CRM - CRM Activity Contact Real Time

Description

Used to analyze/report on all the contacts/contact roles on an activity. Contact dimension in this subject area refers to both primary and non-primary contacts, unlike other subject areas, where it refers to only primary contact. This subject area can be combined with any other subject area that has activity dimension, when results are needed at the level of an activity. For cross-subject-area queries, include at least one metric from each subject area and ensure that the Dimensionality check box under the Advanced tab in reporting is selected.

Business Questions

This subject area can answer the following business questions:

- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- How many contacts were not favored with a positive outcome with a given agent?
What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
**Subject Areas for Transactional Business Intelligence in Engagement**

- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

### Primary Navigation
Navigator > Service > Activities

### Time Reporting
This subject area doesn’t report historical data.
This subject area has no anchoring date.

### Transactional Grain
Activity and Contact

### Special Considerations
This subject area is an alias of Sales CRM Activity Contact.

**CRM - CRM Activity Objective Real Time**

### Description

Used to analyze/report on all the objectives defined on an activity. This subject area can be combined with any other subject area that has activity dimension, when results are needed at the level of an activity. For cross-subject-area queries, include at least one metric from each subject area and ensure that the Dimensionality check box under the Advanced tab in reporting is selected.

### Business Questions

This subject area can answer the following business questions:

- What are the activity objectives for the current period?
- What are the latest revisions to activity objectives?
- Who has completed the most activity objectives?

### Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Activities
Time Reporting
This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain
Activity and Objective

Special Considerations
This subject area is an alias of Sales CRM Activity Objective.

CRM - CRM Activity Real Time

Description
Used to analyze/report on activities such as Tasks and Appointments associated to Service Requests and other CRM business entities. For example, Lead and Opportunity. Useful activity attributes such as Type (Call, Meeting, and so on), Owner, Priority, Status, and Outcome make it possible to perform compelling analysis, leading to a better understanding of the time and resource demands in supporting customers, pursuing leads and opportunities, or running marketing campaigns.

Business Questions
This subject area can answer the following business questions:

- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
- How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Lead Qualifier
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to this subject area:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Marketing Lead Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
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Primary Navigation
Navigator > Service > Activities

Time Reporting
This subject area can report historical data.
Time dimension is linked to Sales - CRM Sales Activity."Activity"."Creation Date".

Transactional Grain
Activity

Special Considerations
This subject area is an alias of Sales CRM Sales Activity.

CRM - CRM Activity Resource Real Time

Description
Used to analyze/report on all the resources/resource roles on an activity. Resources dimension in this subject area refers to both primary and non-primary resources, unlike other subject areas, where resource refers to only primary resource. This subject area can be combined with any other subject area that has activity dimension, when results are needed at the level of an activity. For cross-subject-area queries, include at least one metric from each subject area, and ensure that the Dimensionality check box under the Advanced tab in reporting is selected.

Business Questions
This subject area can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- What managers have teams averaging the most activities?
- What are the activity levels in specific regions?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Subject Areas for Transactional Business Intelligence in Engagement

- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
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- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Activities

Time Reporting

This subject area doesn't report historical data.
This subject area has no anchoring date.

Transaction Grain

Activity and Resource

Special Considerations

This subject area is an alias of Sales CRM Activity Resource.

CRM - CRM Interaction Aggregate

Description

This subject area can be used independently or in conjunction with the CRM - CRM Service Request Summary subject area, to help obtain an aggregated view of service interactions by week, month, or a higher period. Managers can obtain an insight into the volume of interactions that occur with or without an associated SR, how often these occur, and across what channels.

Business Questions

This subject area can answer the following business questions:

• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• How many customer interactions happen without an SR?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
Subject Areas for Transactional Business Intelligence in Engagement

- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM - CRM Interaction Aggregate.Interaction.Creation Date.

Transactional Grain

Aggregated interactions at weekly and monthly level

Special Considerations

The Aggregate Service Requests job process needs to be run periodically for data refreshes.
CRM - CRM Interaction Service Requests Real Time

Description

This subject area enables you to analyze interactions in the context of SRs and helps answer questions such as the average number of interactions it takes to close an SR, how would that vary between regions, customer segments, products, service categories, and other business contexts. Insights such as these help managers identify outliers to take corrective action.

Business Questions

This subject area can answer the following business questions:

- **How many times has the customer communicated with the contact center on this particular service request and what channels did they use?**
- **What percentage of service requests involve at least one interaction?**
- **How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?**
- **On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?**

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 2

Subject Areas

- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

This subject area doesn’t report historical data.

This subject area has no anchoring date.

Transactional Grain

Interaction and Service Request

Special Considerations

None.

CRM - CRM Interactions Real Time

Description
Interaction information is captured whenever an inbound or outbound communication occurs between a service personnel and a customer. This subject area enables you to build analyses to obtain a real-time view of the nature of interactions such as the number and frequency of interactions, whether they are inbound, outbound, and so on, across the spectrum of customers, contacts, channels, and agents. Performance indicators such as average interaction handling times are available ready-to-use to enable building quick insights. Interaction Wrap-Up analysis is also supported.

Business Questions

This subject area can answer the following business questions:

- What is the interactions activity level across channels and agents? How do they compare across time periods?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- What are our issue resolution rates for low and high cost channels?
- Are agents prematurely updating SRs as Resolved to make their numbers look better?
- Do customers contact us more often to solve issues or to seek answers to questions?
- How often are my agents able to resolve issues using a low cost channel like chat?
- What channels are the most effective for resolving issues with a single interaction?
Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM - CRM Interactions Real Time.Interaction.Creation Date.

Transactional Grain

Interaction

Special Considerations

None.

CRM - CRM Omni Channel Events Real Time

Description

Enables users to build dynamic analyses to monitor Omnichannel work assignments across agent, queue, and channel. Managers can balance agents' workload by obtaining insight into their current workload, presence, and availability. Key
performance indicators such as average customer wait times, duration in queues, offers, and agents' acceptance rates of work assignments can be measured, for better throughput, higher system efficiency, and improvement in customer satisfaction.

Business Questions

This subject area can answer the following business questions:

- What are the rates for agents declining work offers?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How long is it taking for offers to be made to agents?
- What are the average handle times?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to this subject area:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

This subject area reports historical data.

Time dimension is linked to "CRM - CRM Omni Channel Events Real Time"."Omni Channel Event"."Start Time".

Transactional Grain

Omni Channel Event

Special Considerations

None.

**CRM - CRM Service Request Summary**

Description

Analyses built using this subject area enable customer service managers to
obtain a complete picture of service performance, as it relates to interactions, 
compliance, and knowledge article usage. The analyses built serve to expand 
the real-time reporting of service interactions, by providing additional 
summary metrics and prebuilt reports. The added analytic capabilities provide 
valuable insight, helping service organizations assess the volume and 
effectiveness of their channel interactions in resolving service issues. 
Similarly, SR compliance analysis delivers a comprehensive view of SR 
milestone attainments and compliance. Customer service managers and 
executives can gain visibility into the diverse factors affecting compliance, 
identify patterns for a better understanding of this key area of service 
performance, and take corrective action. This subject area also helps managers to track the extent to which agents leverage knowledge articles in SRs for issue resolutions.

Business Questions

This subject area can answer the following business questions:

- How often are communications being transferred between agents?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What are the number of interactions by channel, agent, and time period?
- What is the average length of time of an interaction, by agent and channel?
- Where are the outliers when it comes to compliance?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 2
Subject Areas

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to this subject area:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
Primary Navigation
Navigator > Service > Service Requests

Time Reporting
This subject area reports historical data.

Time dimension is linked to CRM - CRM Service Request Summary."Service Request Secondary Dates"."Open Date" or CRM - CRM Service Request Summary."Service Request Secondary Dates"."Close Date" or CRM - CRM Service Request Summary."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain
Service Request

Special Considerations
This is a non-real time subject area. The Aggregate Service Requests job process needs to be run periodically for data refreshes.

CRM - CRM Work Orders Real Time

Description
The analysis built using this subject area provides the ability for managers to keep close tabs on SR generated field work orders to ensure alignment with customer commitments and SLAs governing the underlying SRs. Agents can monitor the progress of work orders tied to their own SRs. Key dates such as resolution due date and scheduled date are compared with actual completion dates across resources, teams, products, and customers, to spot trends and exceptions, with the objective of taking corrective action or plan better to avoid future recurrence of suboptimal performance.

Business Questions
This subject area can answer the following business questions:

- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
Primary Navigation
Navigator > Service > Work Orders

Time Reporting
This subject area reports historical data.
Time dimension is linked to CRM - CRM Work Orders Real Time."CRM Work Order"."Creation Date".

Transactional Grain
Work Order

Special Considerations
None.

Service - CRM Customer Coverage Real Time

Description
Provides the ability to report on the detail of service request coverage. Working from date ranges, this subject area is suitable for cross-subject-area queries to provide customer level detail.

Business Questions
This subject area can answer the following business questions:

- Are we equipped to service the increase in coverages?
- How many new coverages begin in the ensuing month?
- To what extent has the number of customer coverages increased between two given dates?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Subject Areas for Transactional Business Intelligence in Engagement

- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Customer Coverage Real Time."Customer Coverage"."Start Date".

Transactional Grain

Coverage
Special Considerations

None.

Service - CRM Inbound Messages Real Time

Description

Allows users to develop analyses to track inbound communications by message channel and the resulting service request creations and updates from those messages. Performance metrics such as average time to create an SR and time for the agent to acknowledge are available down to seconds, allowing for a granular understanding of inbound message flow and the resulting SR response and closure.

Business Questions

This subject area can answer the following business questions:

- Is the Service organization effectively handling new emails in the appropriate timeframe?
- How many messages resulted in new service request creation versus update to existing service request?
- What is the current count of inbound email requests by status and mailbox?
- How many emails are we receiving over time?
- How many emails came from known versus unknown contacts?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 2

Subject Areas

- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles

The following duty roles secure access to this subject area:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Messages

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Inbound Messages Real Time.**Inbound Message**.**Creation Date**.

Transactional Grain

Inbound Message

Special Considerations

None.

Service - CRM Service Queue Resources Real Time

Description

Allows analyses around queues, teams, and resources within a service organization. This subject area can be combined with any other subject area that has employee and service queue dimensions, when the results are needed at the employee and
service queue levels. For cross-subject-area queries, include at least one metric from each subject area, and ensure that the Dimensionality check box is selected during report creation.

Business Questions

This subject area can answer the following business questions:

- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to this subject area:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation
Navigator > Service > Queues

Time Reporting
This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain
Service Queue and Resource

Special Considerations
This is a non-real-time subject area, although its name suggests it is real-time. The Refresh the Business Intelligence Queue Resources Table job process needs to be run periodically for data refreshes.

Service - CRM Service Request Action Plan Actions Real Time

Description
Enables an analysis that helps customer service managers to obtain a complete picture of action plan enforcement of company policies and procedures. Agents can monitor their own performance regarding action plan completions and delays. Action plan information captures compliance against a predefined set of actions, and analytics highlights metrics around open and closed action plans, delayed actions, and aging of action plans. Real-time reporting built using this subject area provides both summary and detail metrics.

Business Questions

This subject area can answer the following business questions:

- How many action plans are open and how long have they been open?
- Are there action plans tracking late to an overall target completion date?
- What is the delay in estimated completion dates?
- What is the breakdown of open action plans by category?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 2

Subject Areas

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Action Plans

Time Reporting

This subject area reports historical data.

Time dimension is linked to "Service - CRM Service Request Action Plan Actions Real Time"."Time"."Date".

Transactional Grain

Action Plan and Action

Special Considerations

Data is limited to Action Plans associated to Service Requests.

Service - CRM Service Request Messages Real Time

Description

Enables analysis of SR messages for service managers to understand message traffic patterns, channel usages, message processing statuses, message types, message origins and assignments, and such other aspects of messaging. Tracking of specific message types that have a bearing on customer satisfaction such as customer entry and response message types to ensure timely response or updates is another key value that can be derived from the analyses created.

Business Questions
This subject area can answer the following business questions:

- Are we responding to customer messages in a timely manner?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- HR Help Desk Administrator Transaction Analysis Duty
Oracle Engagement Cloud
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 2
Subject Areas

- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation
Navigator > Service > Service Requests > Service Request Details > Messages

Time Reporting
This subject area reports historical data.

Time dimension is linked to Service - CRM Service Request Messages Real Time."Service Request Message"."Last Update Date".

Transactional Grain
Service Request Message

Special Considerations
None.

Service - CRM Service Request Milestones Real Time

Description
Provides the ability to report on the performance of each service agent, and the means to resolve SRs and meet stated targets. A milestone is a specific target set for the resolution of the SR. The information provided in this subject area allows service managers to identify efficient agents, coach, and measure under-performance within the team. It also allows agents to effectively monitor personal performance to meet the milestone targets. Like most others, this is a real-time subject area, allowing up to the moment reporting on SR performance to milestone targets.
Business Questions

This subject area can answer the following business questions:

- How does my team perform in meeting first response milestones versus resolution milestones?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- Are there currently service requests that have missed the target milestone and require escalation?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to this subject area:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Milestone Details

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Service Request Milestones Real Time."Time"."Date" (Note: This is the Service Request Open Date).

Transactional Grain

Service Request and Coverage Template

Special Considerations

None.

**Service - CRM Service Request Resource Real Time**

Description
Used to analyze and report on all the resources, and resource roles on an SR. Employee dimension in this subject area refers to both primary and non-primary resources, unlike other subject areas where employee refers to only primary resource. This subject area can be combined with any other subject area that has SR dimension, when results are required at the level of an SR. For cross-subject-area queries, include at least one metric from each subject area.

Business Questions

This subject area can answer the following business questions:

- As an agent am I spreading myself too thin by being part of one too many SR teams?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to this subject area:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation
Navigator > Service > Service Requests

Time Reporting
This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain
Service Request and Resource

Special Considerations
None.

Service - CRM Service Requests Real Time

Description
Provides the ability to report on service requests. The information provided in this subject area allows service managers and agents to review critical SRs, targets, priority status, and measure service performance levels in alignment with organizational goals. It also allows agents to effectively monitor personal performance in dispositioning service requests in a timely manner. It also enables building insightful reports to measure SR throughput such as submissions, updates, resolutions, closures,
reopens, and so on. Analyses uncover bottlenecks in speedy resolution of SRs by alerting to long wait times at agent and customer.

Business Questions

This subject area can answer the following business questions:

- Who are my agents that have the most pending SRs?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- What are the SRs that are waiting on my customers?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Oracle Engagement Cloud

Subject Areas for Transactional Business Intelligence in Engagement

Subject Areas

- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Service Requests Real Time."Service Request Secondary Dates"."Open Date" or Service - CRM Service Requests Real Time."Service Request Secondary Dates"."Close Date" or Service - CRM Service Requests Real Time."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Service Request

Special Considerations

None.
Service - CRM Social Post Real Time

Description

Provides the ability to develop analyses around social posts created in the context of an SR. Access to the social post channel, associated SR, social post detail, and social post specific metrics supports the development of complex reporting around SR social posts in real-time.

Business Questions

This subject area can answer the following business questions:

- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
- How many social posts are we receiving over time?
- What is the current count of inbound social requests by status and social channel?
- How many social posts came from known versus unknown contacts?
- How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles
Chapter 2
Subject Areas

The following duty roles secure access to this subject area:

- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**

Primary Navigation
Navigator > Service > Service Requests

Time Reporting
This subject area reports historical data.
Time dimension is linked to Service - CRM Social Post Real Time."Social Post"."Social Post Creation Date".

Transactional Grain
Social Post

Special Considerations
None.
3 Business Questions

Overview

For each business question in this chapter, links are provided for more detailed information about the subject areas, job roles, and duty roles associated with the business question.

What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Contact Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
Oracle Engagement Cloud
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 3
Business Questions

- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many contacts were not favored with a positive outcome with a given agent?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Contact Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How many distinct customer contacts does an agent interact with through a given channel during a specific period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Contact Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the activity objectives for the current period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Objective Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
Subject Areas for Transactional Business Intelligence in Engagement

Business Questions

- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the latest revisions to activity objectives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Objective Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Who has completed the most activity objectives?

Subject Areas
Subject Areas for Transactional Business Intelligence in Engagement

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Activity Objective Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
Are there any workload balancing issues in my team, with a few members performing most of the activities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Activity Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Lead Qualifier**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Sales Managerial Transaction Analysis Duty
Sales Transaction Analysis Duty
Service Administrative Transaction Analysis Duty
Service Managerial Transaction Analysis Duty
Service Transaction Analysis Duty

As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
• Sales Administrator
• Sales Lead Qualifier
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Marketing Lead Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• CRM - CRM Activity Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
How can I identify neglected but strategic accounts to guide my team to focus on these?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
Subject Areas for Transactional Business Intelligence in Engagement

Business Questions

- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the activity levels in specific regions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Resource Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 3

Business Questions

- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What managers have teams averaging the most activities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Resource Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How do the number of activities in a region and their average SR resolution rates by quarter compare?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Resource Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How often do communications cross channels to get to resolution?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Aggregate
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How many customer interactions happen without an SR?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Aggregate

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Across what channels do such non-SR interactions most often occur?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Aggregate

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Is my team following the norm that an SR must be opened (or updated) for every customer communication?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Aggregate

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
• **Channel Partner Portal Administrator**
• **Channel Sales Director**
• **Channel Sales Manager**
• **Customer Relationship Management Application Administrator**
• **Customer Service Manager**
• **Customer Service Representative**
• **Partner Administrator**
• **Partner Sales Manager**
• **Partner Sales Representative**
• **Sales Administrator**
• **Sales Manager**
• **Sales Representative**
• **Sales Restricted User**
• **Sales VP**

### Duty Roles

The following duty roles secure access to the data related to this business question:

• **Partner Channel Administrative Transaction Analysis Duty**
• **Partner Channel Transaction Analysis Duty**
• **Partner Org Transaction Analysis Duty**
• **Sales Administrative Transaction Analysis Duty**
• **Sales Executive Transaction Analysis Duty**
• **Sales Managerial Transaction Analysis Duty**
• **Sales Transaction Analysis Duty**
• **Service Administrative Transaction Analysis Duty**
• **Service Managerial Transaction Analysis Duty**
• **Service Transaction Analysis Duty**

How many times has the customer communicated with the contact center on this particular service request and what channels did they use?

### Subject Areas
Chapter 3
Business Questions

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interaction Service Requests Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What percentage of service requests involve at least one interaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Subject Areas for Transactional Business Intelligence in Engagement

• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interaction Service Requests Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
Subject Areas for Transactional Business Intelligence in Engagement

### Chapter 3

#### Business Questions

- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

**What is the interactions activity level across channels and agents? How do they compare across time periods?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interactions Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
- **Sales Restricted User**
- **Sales VP**
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in Engagement

**Business Questions**

- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

**Do customers contact us more often to solve issues or to seek answers to questions?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
What channels are the most effective for resolving issues with a single interaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interactions Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
- **Sales VP**

Duty Roles

The following duty roles secure access to the data related to this business question:

- **Partner Channel Administrative Transaction Analysis Duty**
Subject Areas for Transactional Business Intelligence in Engagement

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### Business Questions

- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

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**What are our issue resolution rates for low and high cost channels?**

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**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interactions Real Time**

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**Job Roles**

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are agents prematurely updating SRs as Resolved to make their numbers look better?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Oracle Engagement Cloud
Subject Areas for Transactional Business Intelligence in Engagement

Business Questions

- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How often are my agents able to resolve issues using a low cost channel like chat?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interactions Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
How many interactions are being lost/abandoned? How does this compare with previous periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the rates for agents declining work offers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in Engagement

**Business Questions**

- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Omni Channel Events Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the average handle times?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 3

**Business Questions**

- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**
How long is it taking for offers to be made to agents?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How often do communications cross channels before they are resolved?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
Subject Areas for Transactional Business Intelligence in Engagement

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- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What percent of communications are resolved the first time? What is the most commonly used channel?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
### What are the number of interactions by channel, agent, and time period?

#### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Service Request Summary**
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
How often are communications being transferred between agents?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Service Request Summary**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many interactions, on average, does it require to resolve an issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in Engagement

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Business Questions

- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
What is the average length of time of an interaction, by agent and channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What product lines have a higher percentage of non-compliant SRs open?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty
How is the percentage of compliant SRs trending month over month, quarter over quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Where are the outliers when it comes to compliance?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are we keeping the number of non-compliant SRs in check for our most valuable customers?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
How frequently do agents link articles to SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Service Request Summary**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• CRM - CRM Service Request Summary
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in Engagement

Business Questions

- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Sales Restricted User
Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many were compliant and non-compliant when I, as an agent review my own completed work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
How many showed up as compliant; how many were non-compliant during my review of completed work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many new coverages begin in the ensuing month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Customer Coverage Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
• **Partner Sales Representative**
• **Sales Administrator**
• **Sales Manager**
• **Sales Representative**
• **Sales Restricted User**
• **Sales VP**

### Duty Roles

The following duty roles secure access to the data related to this business question:

• **Partner Channel Administrative Transaction Analysis Duty**
• **Partner Channel Transaction Analysis Duty**
• **Partner Org Transaction Analysis Duty**
• **Sales Administrative Transaction Analysis Duty**
• **Sales Executive Transaction Analysis Duty**
• **Sales Managerial Transaction Analysis Duty**
• **Sales Transaction Analysis Duty**
• **Service Administrative Transaction Analysis Duty**
• **Service Managerial Transaction Analysis Duty**
• **Service Transaction Analysis Duty**

### To what extent has the number of customer coverages increased between two given dates?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• **Service - CRM Customer Coverage Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

• **Channel Account Manager**
• **Channel Administrator**
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

**Are we equipped to service the increase in coverages?**

**Subject Areas**
The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Customer Coverage Real Time**

## Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

## Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
How many emails are we receiving over time?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Inbound Messages Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**

Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
What is the current count of inbound email requests by status and mailbox?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Inbound Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

How many messages resulted in new service request creation versus update to existing service request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Inbound Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
• **Human Resource Help Desk Manager**
• **Partner Administrator**
• **Partner Sales Manager**
• **Partner Sales Representative**
• **Sales Administrator**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

• **HR Help Desk Administrator Transaction Analysis Duty**
• **HR Help Desk Manager Transaction Analysis Duty**
• **Partner Channel Administrative Transaction Analysis Duty**
• **Partner Channel Transaction Analysis Duty**
• **Partner Org Transaction Analysis Duty**
• **Sales Administrative Transaction Analysis Duty**
• **Service Administrative Transaction Analysis Duty**
• **Service Managerial Transaction Analysis Duty**

**How many emails came from known versus unknown contacts?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

• **Service - CRM Inbound Messages Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

• **Channel Account Manager**
• **Channel Administrator**
• **Channel Operations Manager**
• **Channel Partner Manager**
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**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Is the Service organization effectively handling new emails in the appropriate timeframe?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Inbound Messages Real Time*

**Job Roles**
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

Are my team resources optimally deployed across service queues to maximize productivity?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Queue Resources Real Time

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
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- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Queue Resources Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Queue Resources Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Are there action plans tracking late to an overall target completion date?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Action Plan Actions Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What is the delay in estimated completion dates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Action Plan Actions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
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• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

What is the breakdown of open action plans by category?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Service - CRM Service Request Action Plan Actions Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How many action plans are open and how long have they been open?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Action Plan Actions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
Are we responding to customer messages in a timely manner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 3

Business Questions

- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Messages Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Messages Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
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- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
Subject Areas for Transactional Business Intelligence in Engagement

Business Questions

- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are there currently service requests that have missed the target milestone and require escalation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are our processes inefficient or preventing agents from meeting milestones?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
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Business Questions

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in Engagement

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Business Questions

Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

How does my team perform in meeting first response milestones versus resolution milestones?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Milestones Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
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**Business Questions**

- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
What is the % of open SRs with milestones, that is, have at least one milestone?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Resource Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Resource Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
As an agent am I spreading myself too thin by being part of one too many SR teams?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Resource Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

What are the open critical SRs that my team is working on currently? How many of these are escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Requests Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 3

Business Questions

- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the SRs that are waiting on my customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

Who are my agents that have the most pending SRs?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Requests Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Requests Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
Subject Areas for Transactional Business Intelligence in Engagement

Business Questions

• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Service - CRM Service Requests Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
How does the aging profile of SRs look like? Are there any outliers calling for intervention?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Requests Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
Sales Manager
Sales Representative
Sales Restricted User
Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
How many social posts are we receiving over time?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Social Post Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**

Duty Roles

The following duty roles secure access to the data related to this business question:

- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
What is the current count of inbound social requests by status and social channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Social Post Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Social Post Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

How many social posts came from known versus unknown contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Social Post Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

Is the Service organization effectively handling new social service requests in the appropriate timeframe?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Social Post Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
• **Sales Administrator**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

• **Partner Channel Administrative Transaction Analysis Duty**
• **Partner Channel Transaction Analysis Duty**
• **Partner Org Transaction Analysis Duty**
• **Sales Administrative Transaction Analysis Duty**
• **Service Administrative Transaction Analysis Duty**
• **Service Managerial Transaction Analysis Duty**
4 Job Roles

Overview

For each job role in this chapter, links are provided for more detailed information about the duty roles, subject areas, and business questions associated with the job role.

Channel Account Manager

Code Name

ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Partner Channel Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• What are the activity objectives for the current period?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
- What are the average handle times?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many emails are we receiving over time?
- How many emails came from known versus unknown contacts?
- What is the breakdown of open action plans by category?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
- How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Channel Administrator

Code Name

ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- Partner Channel Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
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- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
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- What channels are the most effective for resolving issues with a single interaction?
- What are the average handle times?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many emails are we receiving over time?
- How many emails came from known versus unknown contacts?
- What is the breakdown of open action plans by category?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
- How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Channel Operations Manager

Code Name
ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB

Duty Roles
This job role is related to the following duty roles:

- Partner Channel Administrative Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• What are the activity objectives for the current period?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

• What channels are the most effective for resolving issues with a single interaction?

• What are the average handle times?

• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

• How many emails are we receiving over time?

• How many emails came from known versus unknown contacts?

• What is the breakdown of open action plans by category?

• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?

• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Channel Partner Manager

Code Name

ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Partner Channel Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• What are the activity objectives for the current period?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
- What is the average length of time of an interaction, by agent and channel?
- Where are the outliers when it comes to compliance?
- How many messages resulted in new service request creation versus update to existing service request?
- How many action plans are open and how long have they been open?
- Are there currently service requests that have missed the target milestone and require escalation?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
- What managers have teams averaging the most activities?
- How many customer interactions happen without an SR?
- What are our issue resolution rates for low and high cost channels?
- Are agents prematurely updating SRs as Resolved to make their numbers look better?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How long is it taking for offers to be made to agents?
- How many new coverages begin in the ensuing month?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
- What is the current count of inbound social requests by status and social channel?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- How often are my agents able to resolve issues using a low cost channel like chat?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- What is the current count of inbound email requests by status and mailbox?
- Are there action plans tracking late to an overall target completion date?
- What is the delay in estimated completion dates?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Channel Partner Portal Administrator

Code Name

ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

• Partner Channel Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 4

Job Roles

- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- What are the SRs that are waiting on my customers?
- How many social posts are we receiving over time?
- Who has completed the most activity objectives?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

How many social posts came from known versus unknown contacts?

Is my team following the norm that an SR must be opened (or updated) for every customer communication?

On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

What channels are the most effective for resolving issues with a single interaction?

What are the average handle times?

How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

How many emails are we receiving over time?

How many emails came from known versus unknown contacts?

What is the breakdown of open action plans by category?

What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

How does the aging profile of SRs look like? Are there any outliers calling for intervention?

How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?

How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Channel Sales Director

Code Name

ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB

Duty Roles

This job role is related to the following duty roles:

- Partner Channel Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

**Business Questions**

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?

• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

• How often do communications cross channels before they are resolved?

• How frequently do agents link articles to SRs?

• Are we equipped to service the increase in coverages?

• Are my team resources optimally deployed across service queues to maximize productivity?

• Are we responding to customer messages in a timely manner?

• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

• What is the % of open SRs with milestones, that is, have at least one milestone?

• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

• How many contacts were not favored with a positive outcome with a given agent?

• How often do communications cross channels to get to resolution?

• Across what channels do such non-SR interactions most often occur?

• What percentage of service requests involve at least one interaction?

• How many interactions are being lost/abandoned? How does this compare with previous periods?

• How many interactions, on average, does it require to resolve an issue?

• What product lines have a higher percentage of non-compliant SRs open?

• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

• Is the Service organization effectively handling new social service requests in the appropriate timeframe?

• Are there any workload balancing issues in my team, with a few members performing most of the activities?

• How can I identify neglected but strategic accounts to guide my team to focus on these?

• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

• How many showed up as compliant; how many were non-compliant during my review of completed work orders?

• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

• Are our processes inefficient or preventing agents from meeting milestones?

• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

• What are the open critical SRs that my team is working on currently? How many of these are escalated?

• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?

• Who has completed the most activity objectives?

• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?

• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

• What are the number of interactions by channel, agent, and time period?

• What is the average length of time of an interaction, by agent and channel?

• Where are the outliers when it comes to compliance?

• How many messages resulted in new service request creation versus update to existing service request?

• How many action plans are open and how long have they been open?

• Are there currently service requests that have missed the target milestone and require escalation?

• As an agent am I spreading myself too thin by being part of one too many SR teams?

• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

• What managers have teams averaging the most activities?

• How many customer interactions happen without an SR?

• What are our issue resolution rates for low and high cost channels?

• Are agents prematurely updating SRs as Resolved to make their numbers look better?

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

• How long is it taking for offers to be made to agents?

• How many new coverages begin in the ensuing month?

• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

• What is the current count of inbound social requests by status and social channel?

• What are the activity levels in specific regions?

• Do customers contact us more often to solve issues or to seek answers to questions?

• How often are my agents able to resolve issues using a low cost channel like chat?

• What percent of communications are resolved the first time? What is the most commonly used channel?

• How is the percentage of compliant SRs trending month over month, quarter over quarter?

• Are we keeping the number of non-compliant SRs in check for our most valuable customers?

• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

• How many were compliant and non-compliant when I, as an agent review my own completed work orders?

• To what extent has the number of customer coverages increased between two given dates?

• What is the current count of inbound email requests by status and mailbox?

• Are there action plans tracking late to an overall target completion date?
What is the delay in estimated completion dates?

What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

How many social posts came from known versus unknown contacts?

Is my team following the norm that an SR must be opened (or updated) for every customer communication?

On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

What channels are the most effective for resolving issues with a single interaction?

What are the average handle times?

How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

How many emails are we receiving over time?

How many emails came from known versus unknown contacts?

What is the breakdown of open action plans by category?

What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

How does the aging profile of SRs look like? Are there any outliers calling for intervention?

How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Channel Sales Manager

Code Name

ORA_ZPM_CHANNEL_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Partner Channel Transaction Analysis Duty
Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?

• What are the latest revisions to activity objectives?

• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

• How often do communications cross channels before they are resolved?

• How frequently do agents link articles to SRs?

• Are we equipped to service the increase in coverages?

• Are my team resources optimally deployed across service queues to maximize productivity?

• Are we responding to customer messages in a timely manner?

• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

• What is the % of open SRs with milestones, that is, have at least one milestone?

• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

• How many contacts were not favored with a positive outcome with a given agent?

• How often do communications cross channels to get to resolution?

• Across what channels do such non-SR interactions most often occur?

• What percentage of service requests involve at least one interaction?

• How many interactions are being lost/abandoned? How does this compare with previous periods?

• How many interactions, on average, does it require to resolve an issue?

• What product lines have a higher percentage of non-compliant SRs open?

• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

• Is the Service organization effectively handling new social service requests in the appropriate timeframe?

• Are there any workload balancing issues in my team, with a few members performing most of the activities?

• How can I identify neglected but strategic accounts to guide my team to focus on these?

• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

• How many showed up as compliant; how many were non-compliant during my review of completed work orders?

• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

• Are our processes inefficient or preventing agents from meeting milestones?

• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Customer Relationship Management Application
Administrator

Code Name
ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB

Duty Roles
This job role is related to the following duty roles:

- **Service Administrative Transaction Analysis Duty**

### Subject Areas

This job role secures access to the following subject areas:

- **CRM - CRM Activity Contact Real Time**
- **CRM - CRM Activity Objective Real Time**
- **CRM - CRM Activity Real Time**
- **CRM - CRM Activity Resource Real Time**
- **CRM - CRM Interaction Aggregate**
- **CRM - CRM Interaction Service Requests Real Time**
- **CRM - CRM Interactions Real Time**
- **CRM - CRM Omni Channel Events Real Time**
- **CRM - CRM Service Request Summary**
- **CRM - CRM Work Orders Real Time**
- **Service - CRM Customer Coverage Real Time**
- **Service - CRM Inbound Messages Real Time**
- **Service - CRM Service Queue Resources Real Time**
- **Service - CRM Service Request Action Plan Actions Real Time**
- **Service - CRM Service Request Messages Real Time**
- **Service - CRM Service Request Milestones Real Time**
- **Service - CRM Service Request Resource Real Time**
- **Service - CRM Service Requests Real Time**
- **Service - CRM Social Post Real Time**

### Business Questions

This job role secures access to data that can answer the following business questions:

- **What are the activity objectives for the current period?**
- **How do the number of activities in a region and their average SR resolution rates by quarter compare?**
- **How many times has the customer communicated with the contact center on this particular service request and what channels did they use?**
- **What is the interactions activity level across channels and agents? How do they compare across time periods?**
- **What are the rates for agents declining work offers?**
- **How often are communications being transferred between agents?**
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

• How many were compliant and non-compliant when I, as an agent review my own completed work orders?

• To what extent has the number of customer coverages increased between two given dates?

• What is the current count of inbound email requests by status and mailbox?

• Are there action plans tracking late to an overall target completion date?

• What is the delay in estimated completion dates?

• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• How many social posts came from known versus unknown contacts?

• Is my team following the norm that an SR must be opened (or updated) for every customer communication?

• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

• What channels are the most effective for resolving issues with a single interaction?

• What are the average handle times?

• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

• How many emails are we receiving over time?

• How many emails came from known versus unknown contacts?

• What is the breakdown of open action plans by category?

• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Customer Service Manager

Code Name

ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB
Duty Roles

This job role is related to the following duty roles:

- Service Managerial Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

Are our processes inefficient or preventing agents from meeting milestones?

Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

What are the open critical SRs that my team is working on currently? How many of these are escalated?

What are the SRs that are waiting on my customers?

How many social posts are we receiving over time?

Who has completed the most activity objectives?

As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?

How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

What is the number of interactions by channel, agent, and time period?

What is the average length of time of an interaction, by agent and channel?

Where are the outliers when it comes to compliance?

How many messages resulted in new service request creation versus update to existing service request?

How many action plans are open and how long have they been open?

Are there currently service requests that have missed the target milestone and require escalation?

As an agent am I spreading myself too thin by being part of one too many SR teams?

What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

What managers have teams averaging the most activities?

How many customer interactions happen without an SR?

What are our issue resolution rates for low and high cost channels?

Are agents prematurely updating SRs as Resolved to make their numbers look better?

As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

How long is it taking for offers to be made to agents?

How many new coverages begin in the ensuing month?

Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

What is the current count of inbound social requests by status and social channel?

What are the activity levels in specific regions?

Do customers contact us more often to solve issues or to seek answers to questions?

How often are my agents able to resolve issues using a low cost channel like chat?

What percent of communications are resolved the first time? What is the most commonly used channel?

How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopens?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?
Duty Roles

This job role is related to the following duty roles:

- Service Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Human Resource Help Desk Administrator

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

• HR Help Desk Administrator Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- CRM - CRM Activity Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What is the current count of inbound email requests by status and mailbox?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the average handle times?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Human Resource Help Desk Agent

Code Name

ORA_SVC_HUMANRESOURCE_HELP_DESK_AGENT_JOB

Duty Roles

This job role is related to the following duty roles:

• HR Help Desk Agent Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activity Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?

- **Who are my agents that have the most pending SRs?**
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- What are the SRs that are waiting on my customers?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
- How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What are the number of interactions by channel, agent, and time period?
- What is the average length of time of an interaction, by agent and channel?
- Where are the outliers when it comes to compliance?
- Are there currently service requests that have missed the target milestone and require escalation?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How long is it taking for offers to be made to agents?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the average handle times?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?

Human Resource Help Desk Manager

Code Name
ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• HR Help Desk Manager Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activity Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
Subject Areas for Transactional Business Intelligence in Engagement

- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What is the current count of inbound email requests by status and mailbox?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the average handle times?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
Partner Administrator

Code Name

ORA_ZPM_PARTNER_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- Partner Org Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions
This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

• What is the current count of inbound social requests by status and social channel?

• What are the activity levels in specific regions?

• Do customers contact us more often to solve issues or to seek answers to questions?

• How often are my agents able to resolve issues using a low cost channel like chat?

• What percent of communications are resolved the first time? What is the most commonly used channel?

• How is the percentage of compliant SRs trending month over month, quarter over quarter?

• Are we keeping the number of non-compliant SRs in check for our most valuable customers?

• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

• How many were compliant and non-compliant when I, as an agent review my own completed work orders?

• To what extent has the number of customer coverages increased between two given dates?

• What is the current count of inbound email requests by status and mailbox?

• Are there action plans tracking late to an overall target completion date?

• What is the delay in estimated completion dates?

• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• How many social posts came from known versus unknown contacts?

• Is my team following the norm that an SR must be opened (or updated) for every customer communication?

• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

• What channels are the most effective for resolving issues with a single interaction?

• What are the average handle times?

• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

• How many emails are we receiving over time?

• How many emails came from known versus unknown contacts?

• What is the breakdown of open action plans by category?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?
Partner Sales Manager

Code Name
ORA_ZPM_PARTNER_SALES_MANAGER_JOB

Duty Roles
This job role is related to the following duty roles:

• Partner Org Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time
This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?
Partner Sales Representative

Code Name

ORA_ZPM_PARTNER_SALES_REPRESENTATIVE_JOB

Duty Roles

This job role is related to the following duty roles:

- Partner Org Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions
This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?
Sales Administrator

Code Name

ORA_ZBS_SALES_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
Oracle Engagement Cloud
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 4
Job Roles

- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
- How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Sales Lead Qualifier

Code Name

ORA_MKL_SALES_LEAD_QUALIFIER_JOB

Duty Roles

This job role is related to the following duty roles:

- Marketing Lead Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many contacts were not favored with a positive outcome with a given agent?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• What are the activity levels in specific regions?

Sales Manager

Code Name

ORA_ZBS_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Marketing Lead Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
Sales Representative

Code Name

ORA_ZBS_SALES_REPRESENTATIVE_JOB

Duty Roles

This job role is related to the following duty roles:

- Marketing Lead Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
Duty Roles

This job role is related to the following duty roles:

- Marketing Lead Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- What are the SRs that are waiting on my customers?
- Who has completed the most activity objectives?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
- How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What are the number of interactions by channel, agent, and time period?
- What is the average length of time of an interaction, by agent and channel?
- Where are the outliers when it comes to compliance?
- How many action plans are open and how long have they been open?
- Are there currently service requests that have missed the target milestone and require escalation?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
- What managers have teams averaging the most activities?
- How many customer interactions happen without an SR?
- What are our issue resolution rates for low and high cost channels?
- Are agents prematurely updating SRs as Resolved to make their numbers look better?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How long is it taking for offers to be made to agents?
- How many new coverages begin in the ensuing month?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- How often are my agents able to resolve issues using a low cost channel like chat?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Sales VP

Code Name

ORA_ZBS_SALES_VP_JOB

Duty Roles

This job role is related to the following duty roles:

• Marketing Lead Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• **Who has completed the most activity objectives?**

• **As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?**

• **How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?**

• **Are there preferred channels that customers use to contact us for specific service issue categories and product areas?**

• **What are the number of interactions by channel, agent, and time period?**

• **What is the average length of time of an interaction, by agent and channel?**

• **Where are the outliers when it comes to compliance?**

• **How many action plans are open and how long have they been open?**

• **Are there currently service requests that have missed the target milestone and require escalation?**

• **As an agent am I spreading myself too thin by being part of one too many SR teams?**

• **What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?**

• **What managers have teams averaging the most activities?**

• **How many customer interactions happen without an SR?**

• **What are our issue resolution rates for low and high cost channels?**

• **Are agents prematurely updating SRs as Resolved to make their numbers look better?**

• **As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?**

• **How long is it taking for offers to be made to agents?**

• **How many new coverages begin in the ensuing month?**

• **Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?**

• **What are the activity levels in specific regions?**

• **Do customers contact us more often to solve issues or to seek answers to questions?**

• **How often are my agents able to resolve issues using a low cost channel like chat?**

• **What percent of communications are resolved the first time? What is the most commonly used channel?**

• **How is the percentage of compliant SRs trending month over month, quarter over quarter?**

• **Are we keeping the number of non-compliant SRs in check for our most valuable customers?**

• **What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?**

• **How many were compliant and non-compliant when I, as an agent review my own completed work orders?**

• **To what extent has the number of customer coverages increased between two given dates?**

• **Are there action plans tracking late to an overall target completion date?**

• **What is the delay in estimated completion dates?**

• **What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?**
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• Is my team following the norm that an SR must be opened (or updated) for every customer communication?

• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

• What channels are the most effective for resolving issues with a single interaction?

• What are the average handle times?

• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

• What is the breakdown of open action plans by category?

• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
5 Duty Roles

Overview

For each duty role in this chapter, links are provided for more detailed information about the job roles, subject areas, and business questions associated with the duty role.

HR Help Desk Administrator Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_ADMIN_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Human Resource Help Desk Administrator

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions
This duty role secures access to data that can answer the following business questions:

- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- What are the SRs that are waiting on my customers?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
- How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What is the current count of inbound email requests by status and mailbox?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the average handle times?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
Job Roles

This duty role is related to the following job roles:

• Human Resource Help Desk Agent

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activity Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the average handle times?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?

HR Help Desk Manager Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_MANAGER_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Human Resource Help Desk Manager

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activity Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What is the current count of inbound email requests by status and mailbox?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the average handle times?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Marketing Lead Transaction Analysis Duty

Code Name

FBI_MARKETING_LEAD_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Sales Lead Qualifier
• Sales Manager
Sales Representative
Sales Restricted User
Sales VP

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many contacts were not favored with a positive outcome with a given agent?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
- How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
- What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
- What managers have teams averaging the most activities?
- What are the activity levels in specific regions?

Partner Channel Administrative Transaction Analysis Duty

Code Name
FBI_PARTNER_CHANNEL_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY
Job Roles

This duty role is related to the following job roles:

- Channel Administrator
- Channel Operations Manager
- Channel Partner Portal Administrator

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
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- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

• How many showed up as compliant; how many were non-compliant during my review of completed work orders?

• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

• Are our processes inefficient or preventing agents from meeting milestones?

• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

• What are the open critical SRs that my team is working on currently? How many of these are escalated?

• What are the SRs that are waiting on my customers?

• How many social posts are we receiving over time?

• Who has completed the most activity objectives?

• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?

• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

• What are the number of interactions by channel, agent, and time period?

• What is the average length of time of an interaction, by agent and channel?

• Where are the outliers when it comes to compliance?

• How many messages resulted in new service request creation versus update to existing service request?

• How many action plans are open and how long have they been open?

• Are there currently service requests that have missed the target milestone and require escalation?

• As an agent am I spreading myself too thin by being part of one too many SR teams?

• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

• What managers have teams averaging the most activities?

• How many customer interactions happen without an SR?

• What are our issue resolution rates for low and high cost channels?

• Are agents prematurely updating SRs as Resolved to make their numbers look better?

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

• How long is it taking for offers to be made to agents?

• How many new coverages begin in the ensuing month?

• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

• What is the current count of inbound social requests by status and social channel?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- How often are my agents able to resolve issues using a low cost channel like chat?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- What is the current count of inbound email requests by status and mailbox?
- Are there action plans tracking late to an overall target completion date?
- What is the delay in estimated completion dates?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- How many social posts came from known versus unknown contacts?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What channels are the most effective for resolving issues with a single interaction?
- What are the average handle times?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many emails are we receiving over time?
- How many emails came from known versus unknown contacts?
- What is the breakdown of open action plans by category?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
- How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?
Partner Channel Transaction Analysis Duty

Code Name

FBI_PARTNER_CHANNEL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Channel Account Manager
- Channel Partner Manager
- Channel Sales Director
- Channel Sales Manager

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

- **What are the activity objectives for the current period?**
- **How do the number of activities in a region and their average SR resolution rates by quarter compare?**
- **How many times has the customer communicated with the contact center on this particular service request and what channels did they use?**
- **What is the interactions activity level across channels and agents? How do they compare across time periods?**
- **What are the rates for agents declining work offers?**
- **How often are communications being transferred between agents?**
- **Is the Service organization effectively handling new emails in the appropriate timeframe?**
- **Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?**
- **How does my team perform in meeting first response milestones versus resolution milestones?**
- **Who are my agents that have the most pending SRs?**
- **How many distinct customer contacts does an agent interact with through a given channel during a specific period?**
- **What are the latest revisions to activity objectives?**
- **I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?**
- **How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?**
- **Are there currently work requests that have a long acceptance time? What are the agent utilization rates?**
- **How often do communications cross channels before they are resolved?**
- **How frequently do agents link articles to SRs?**
- **Are we equipped to service the increase in coverages?**
- **Are my team resources optimally deployed across service queues to maximize productivity?**
- **Are we responding to customer messages in a timely manner?**
- **How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?**
- **What is the % of open SRs with milestones, that is, have at least one milestone?**
- **What are the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?**
- **How many contacts were not favored with a positive outcome with a given agent?**
- **Across what channels do such non-SR interactions most often occur?**
- **What percentage of service requests involve at least one interaction?**
- **How many interactions are being lost/abandoned? How does this compare with previous periods?**
- **How many interactions, on average, does it require to resolve an issue?**
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Partner Org Transaction Analysis Duty

Code Name

FBI_PARTNER_ORG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
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- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
• **What percentage of service requests involve at least one interaction?**
• **How many interactions are being lost/abandoned? How does this compare with previous periods?**
• **How many interactions, on average, does it require to resolve an issue?**
• **What product lines have a higher percentage of non-compliant SRs open?**
• **Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?**
• **Is the Service organization effectively handling new social service requests in the appropriate timeframe?**
• **Are there any workload balancing issues in my team, with a few members performing most of the activities?**
• **How can I identify neglected but strategic accounts to guide my team to focus on these?**
• **How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?**
• **How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?**
• **How many showed up as compliant; how many were non-compliant during my review of completed work orders?**
• **Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?**
• **Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?**
• **Are our processes inefficient or preventing agents from meeting milestones?**
• **Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?**
• **What are the open critical SRs that my team is working on currently? How many of these are escalated?**
• **What are the SRs that are waiting on my customers?**
• **How many social posts are we receiving over time?**
• **Who has completed the most activity objectives?**
• **As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?**
• **How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?**
• **Are there preferred channels that customers use to contact us for specific service issue categories and product areas?**
• **What are the number of interactions by channel, agent, and time period?**
• **What is the average length of time of an interaction, by agent and channel?**
• **Where are the outliers when it comes to compliance?**
• **How many messages resulted in new service request creation versus update to existing service request?**
• **How many action plans are open and how long have they been open?**
• **Are there currently service requests that have missed the target milestone and require escalation?**
• **What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?**
• **What managers have teams averaging the most activities?**
• **How many customer interactions happen without an SR?**
• **What are our issue resolution rates for low and high cost channels?**
• **Are agents prematurely updating SRs as Resolved to make their numbers look better?**
• **As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?**
• **How long is it taking for offers to be made to agents?**
• **How many new coverages begin in the ensuing month?**
• **Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?**
• **What is the current count of inbound social requests by status and social channel?**
• **What are the activity levels in specific regions?**
• **Do customers contact us more often to solve issues or to seek answers to questions?**
• **How often are my agents able to resolve issues using a low cost channel like chat?**
• **What percent of communications are resolved the first time? What is the most commonly used channel?**
• **How is the percentage of compliant SRs trending month over month, quarter over quarter?**
• **Are we keeping the number of non-compliant SRs in check for our most valuable customers?**
• **What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?**
• **How many were compliant and non-compliant when I, as an agent review my own completed work orders?**
• **To what extent has the number of customer coverages increased between two given dates?**
• **What is the current count of inbound email requests by status and mailbox?**
• **Are there action plans tracking late to an overall target completion date?**
• **What is the delay in estimated completion dates?**
• **What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?**
• **How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?**
• **How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?**
• **How many social posts came from known versus unknown contacts?**
• **Is my team following the norm that an SR must be opened (or updated) for every customer communication?**
• **On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?**
• **What channels are the most effective for resolving issues with a single interaction?**
• **What are the average handle times?**
• **How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?**
• **How many emails are we receiving over time?**
• **How many emails came from known versus unknown contacts?**
• **What is the breakdown of open action plans by category?**
Sales Administrative Transaction Analysis Duty

Code Name
FBI_SALES_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

• Sales Administrator

Subject Areas
This duty role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• **Service - CRM Service Request Resource Real Time**
• **Service - CRM Service Requests Real Time**
• **Service - CRM Social Post Real Time**

**Business Questions**

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
Chapter 5
Duty Roles

Sales Campaign Transaction Analysis Duty

Code Name
FBI_SALES_CAMPAIGN_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Subject Areas
This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time

Business Questions
This duty role secures access to data that can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

How many contacts were not favored with a positive outcome with a given agent?

Are there any workload balancing issues in my team, with a few members performing most of the activities?

How can I identify neglected but strategic accounts to guide my team to focus on these?

As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?

How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

What managers have teams averaging the most activities?

What are the activity levels in specific regions?

Sales Executive Transaction Analysis Duty

Code Name

FBI_SALES_EXECUTIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Sales VP

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• What are the activity objectives for the current period?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What are the rates for agents declining work offers?
• How often are communications being transferred between agents?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
Sales Managerial Transaction Analysis Duty

Code Name

FBI_SALES_MANAGERIAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Sales Manager
- Sales Restricted User

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 5
Duty Roles

- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- How often are my agents able to resolve issues using a low cost channel like chat?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- Are there action plans tracking late to an overall target completion date?
- What is the delay in estimated completion dates?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What channels are the most effective for resolving issues with a single interaction?
- What are the average handle times?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- What is the breakdown of open action plans by category?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Sales Transaction Analysis Duty

Code Name
FBI_SALES_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Sales Representative

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
What are the rates for agents declining work offers?

How often are communications being transferred between agents?

Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

How does my team perform in meeting first response milestones versus resolution milestones?

Who are my agents that have the most pending SRs?

How many distinct customer contacts does an agent interact with through a given channel during a specific period?

What are the latest revisions to activity objectives?

I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

How often do communications cross channels before they are resolved?

How frequently do agents link articles to SRs?

Are we equipped to service the increase in coverages?

Are my team resources optimally deployed across service queues to maximize productivity?

Are we responding to customer messages in a timely manner?

How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

What is the % of open SRs with milestones, that is, have at least one milestone?

What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

How many contacts were not favored with a positive outcome with a given agent?

How often do communications cross channels to get to resolution?

Across what channels do such non-SR interactions most often occur?

What percentage of service requests involve at least one interaction?

How many interactions are being lost/abandoned? How does this compare with previous periods?

How many interactions, on average, does it require to resolve an issue?

What product lines have a higher percentage of non-compliant SRs open?

Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

Are there any workload balancing issues in my team, with a few members performing most of the activities?

How can I identify neglected but strategic accounts to guide my team to focus on these?

How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

How many showed up as compliant; how many were non-compliant during my review of completed work orders?

Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

• Are our processes inefficient or preventing agents from meeting milestones?

• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

• What are the open critical SRs that my team is working on currently? How many of these are escalated?

• What are the SRs that are waiting on my customers?

• Who has completed the most activity objectives?

• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?

• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

• What are the number of interactions by channel, agent, and time period?

• What is the average length of time of an interaction, by agent and channel?

• Where are the outliers when it comes to compliance?

• How many action plans are open and how long have they been open?

• Are there currently service requests that have missed the target milestone and require escalation?

• As an agent am I spreading myself too thin by being part of one too many SR teams?

• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

• What managers have teams averaging the most activities?

• How many customer interactions happen without an SR?

• What are our issue resolution rates for low and high cost channels?

• Are agents prematurely updating SRs as Resolved to make their numbers look better?

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

• How long is it taking for offers to be made to agents?

• How many new coverages begin in the ensuing month?

• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

• What are the activity levels in specific regions?

• Do customers contact us more often to solve issues or to seek answers to questions?

• How often are my agents able to resolve issues using a low cost channel like chat?

• What percent of communications are resolved the first time? What is the most commonly used channel?

• How is the percentage of compliant SRs trending month over month, quarter over quarter?

• Are we keeping the number of non-compliant SRs in check for our most valuable customers?

• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
Subject Areas for Transactional Business Intelligence in Engagement

Chapter 5

Duty Roles

- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- Are there action plans tracking late to an overall target completion date?
- What is the delay in estimated completion dates?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What channels are the most effective for resolving issues with a single interaction?
- What are the average handle times?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- What is the breakdown of open action plans by category?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Service Administrative Transaction Analysis Duty

Code Name

FBI_SERVICE_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Customer Relationship Management Application Administrator
- Sales Administrator
Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?

• What is the current count of inbound email requests by status and mailbox?

• Are there action plans tracking late to an overall target completion date?

• What is the delay in estimated completion dates?

• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• How many social posts came from known versus unknown contacts?

• Is my team following the norm that an SR must be opened (or updated) for every customer communication?

• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

• What channels are the most effective for resolving issues with a single interaction?

• What are the average handle times?

• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

• How many emails are we receiving over time?

• How many emails came from known versus unknown contacts?

• What is the breakdown of open action plans by category?

• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?

Service Managerial Transaction Analysis Duty

Code Name

FBI_SERVICE_MANAGERIAL_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

- Customer Service Manager

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• How does my team perform in meeting first response milestones versus resolution milestones?
• Who are my agents that have the most pending SRs?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• What are the latest revisions to activity objectives?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How often do communications cross channels before they are resolved?
• How frequently do agents link articles to SRs?
• Are we equipped to service the increase in coverages?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How many contacts were not favored with a positive outcome with a given agent?
• How often do communications cross channels to get to resolution?
• Across what channels do such non-SR interactions most often occur?
• What percentage of service requests involve at least one interaction?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How many interactions, on average, does it require to resolve an issue?
• What product lines have a higher percentage of non-compliant SRs open?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Are there any workload balancing issues in my team, with a few members performing most of the activities?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• What are the SRs that are waiting on my customers?
• How many social posts are we receiving over time?
• Who has completed the most activity objectives?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What are the number of interactions by channel, agent, and time period?
• What is the average length of time of an interaction, by agent and channel?
• Where are the outliers when it comes to compliance?
• How many messages resulted in new service request creation versus update to existing service request?
• How many action plans are open and how long have they been open?
• Are there currently service requests that have missed the target milestone and require escalation?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• What managers have teams averaging the most activities?
• How many customer interactions happen without an SR?
• What are our issue resolution rates for low and high cost channels?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How long is it taking for offers to be made to agents?
• How many new coverages begin in the ensuing month?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• What is the current count of inbound social requests by status and social channel?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• How often are my agents able to resolve issues using a low cost channel like chat?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• What is the current count of inbound email requests by status and mailbox?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many social posts came from known versus unknown contacts?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many emails are we receiving over time?
• How many emails came from known versus unknown contacts?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How many messages resulted in new service request creation versus how many messages resulted in an update to an existing service request?
Job Roles

This duty role is related to the following job roles:

- Customer Service Representative

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the activity objectives for the current period?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What are the rates for agents declining work offers?
- How often are communications being transferred between agents?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Who are my agents that have the most pending SRs?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- What are the latest revisions to activity objectives?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How often do communications cross channels before they are resolved?
- How frequently do agents link articles to SRs?
- Are we equipped to service the increase in coverages?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How many contacts were not favored with a positive outcome with a given agent?
- How often do communications cross channels to get to resolution?
- Across what channels do such non-SR interactions most often occur?
- What percentage of service requests involve at least one interaction?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How many interactions, on average, does it require to resolve an issue?
- What product lines have a higher percentage of non-compliant SRs open?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Are there any workload balancing issues in my team, with a few members performing most of the activities?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

• Are our processes inefficient or preventing agents from meeting milestones?

• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

• What are the open critical SRs that my team is working on currently? How many of these are escalated?

• What are the SRs that are waiting on my customers?

• Who has completed the most activity objectives?

• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?

• How are the individuals on my team performing with regards to completion of their planned tasks on SRs with milestone due dates this week?

• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

• What are the number of interactions by channel, agent, and time period?

• What is the average length of time of an interaction, by agent and channel?

• Where are the outliers when it comes to compliance?

• How many action plans are open and how long have they been open?

• Are there currently service requests that have missed the target milestone and require escalation?

• As an agent am I spreading myself too thin by being part of one too many SR teams?

• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

• What managers have teams averaging the most activities?

• How many customer interactions happen without an SR?

• What are our issue resolution rates for low and high cost channels?

• Are agents prematurely updating SRs as Resolved to make their numbers look better?

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

• How long is it taking for offers to be made to agents?

• How many new coverages begin in the ensuing month?

• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

• What are the activity levels in specific regions?

• Do customers contact us more often to solve issues or to seek answers to questions?

• How often are my agents able to resolve issues using a low cost channel like chat?

• What percent of communications are resolved the first time? What is the most commonly used channel?

• How is the percentage of compliant SRs trending month over month, quarter over quarter?

• Are we keeping the number of non-compliant SRs in check for our most valuable customers?

• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Are there action plans tracking late to an overall target completion date?
• What is the delay in estimated completion dates?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What channels are the most effective for resolving issues with a single interaction?
• What are the average handle times?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• What is the breakdown of open action plans by category?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?