



Spoke Phone Analytics Guide

A step by step guide to understanding
Spoke Analytics and BI tools

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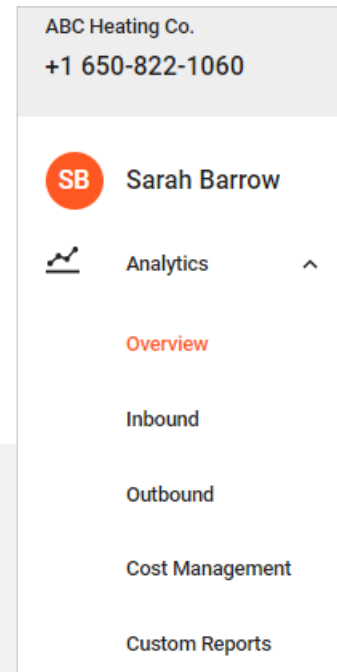
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Overview

The Spoke Phone Analytics Guide is for Phone and Call Center Managers or Business Analysts who monitor business performance within your organization, or who are responsible for producing management information reports to the wider organization.

It provides a step-by-step guide to monitoring day to day operational performance, as well as configuring custom reports to share performance data within your organization.

The Analytics tool sits in your menu bar on the left hand side of the admin portal, directly below the organization name.



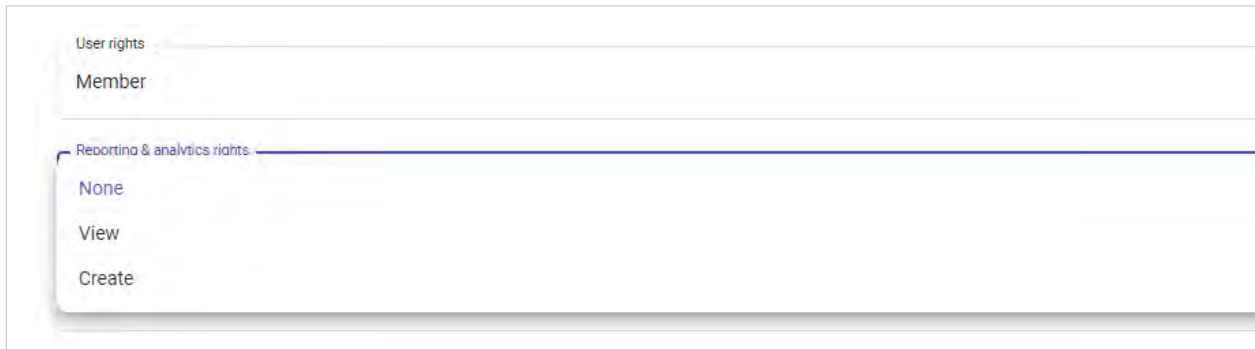
Prerequisites

1. An existing or new Spoke Phone account.
2. Administrator access to your Spoke account, or
3. Analytics and reporting rights granted to your user profile within the Spoke admin portal.

Creating user roles for managed access

Once the Analytics package has been purchased and added to your Spoke account, all administrators will automatically be given access to the Analytics function. Other Spoke users can also be given access from within the 'manage users' page in the admin portal.

There are two role options available - create and view.



Create allows the analytics user to access all areas of the analytics platform and create custom reports. This role is ideal for managers who are responsible for providing management information internally, reporting on key KPIs or managing usage costs associated with running their Spoke account.

View only gives the analytics user the ability to view the pre-built dashboards and/or any custom reports that have been shared with them. This role is ideal for team managers/supervisors who are monitoring intra-day operations.

*Please note that the **create** and **view** roles given to non-administrators will not allow them access to any other part of the administration portal.*

Understanding the pre-built dashboards

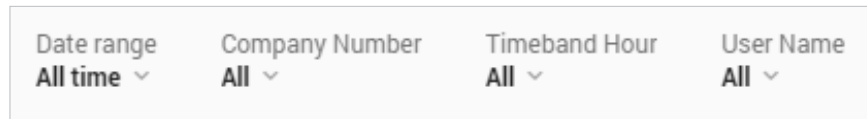
Out of the box, you will be provided with 4 pre-built dashboards:

- Overview
- Inbound
- Outbound
- Cost Management

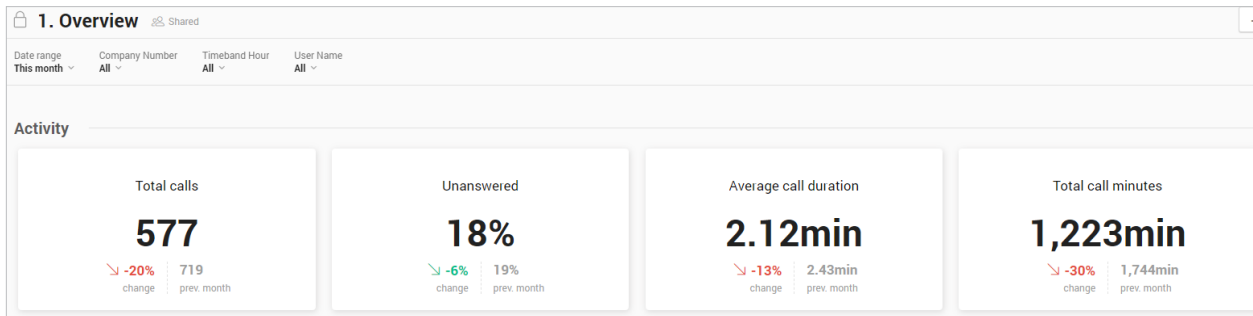
Each dashboard displays a mix of totals, percentages and averages for the KPIs being measured. In addition there are time spans to show activity across days of the week and hours of the day.

The data can also be filtered by:

- Date range
- Phone number
- Time of day
- User Name



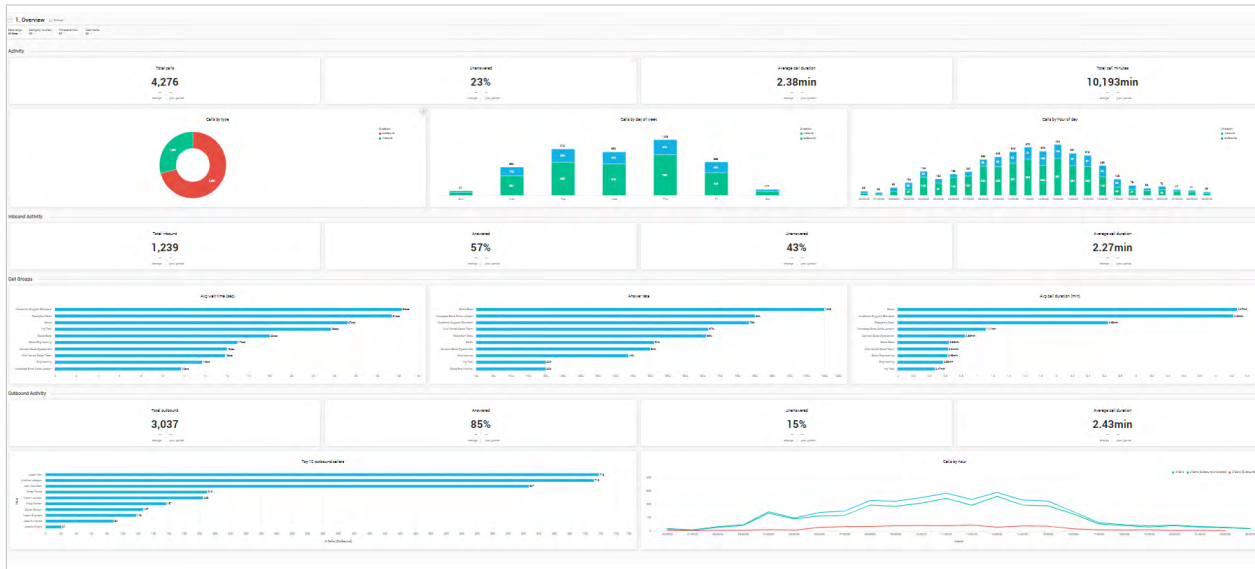
When the filters are changed to a specific time period (rather than all time), you will also be provided with comparative data from the corresponding previous time period. In the example below the data has been filtered for this month, providing comparative data for the previous month.



Understanding the pre-built dashboards

Overview Dashboard

The Overview dashboard provides a holistic view of both inbound and outbound traffic and performance within your Spoke account.



This dashboard provides a high level view of overall performance, both inbound and outbound. In particular the reports showing calls by day of the week and hour of day provide a snapshot of peak periods, allowing you to plan for when your customers are most likely to call.

The metrics also allow you to easily see if you are meeting your SLAs, comparative data to see if performance has improved, as well as individual call group performance. The comparative data can be particularly beneficial if you have, for example, just launched a new marketing campaign. By filtering on the relevant call group, you will be easily able to distinguish if your call volumes have increased as a result of that campaign.

The key performance indicators provided are:

Total calls

% unanswered

Average call duration

Total call minutes

Calls by direction (IB/OB)

Calls by day of the week

Calls by hour of day inbound/outbound

Total inbound/outbound calls

% inbound/outbound answered

% inbound/outbound unanswered

Average inbound/outbound call duration

Average wait time by call group

Answer rate by call group

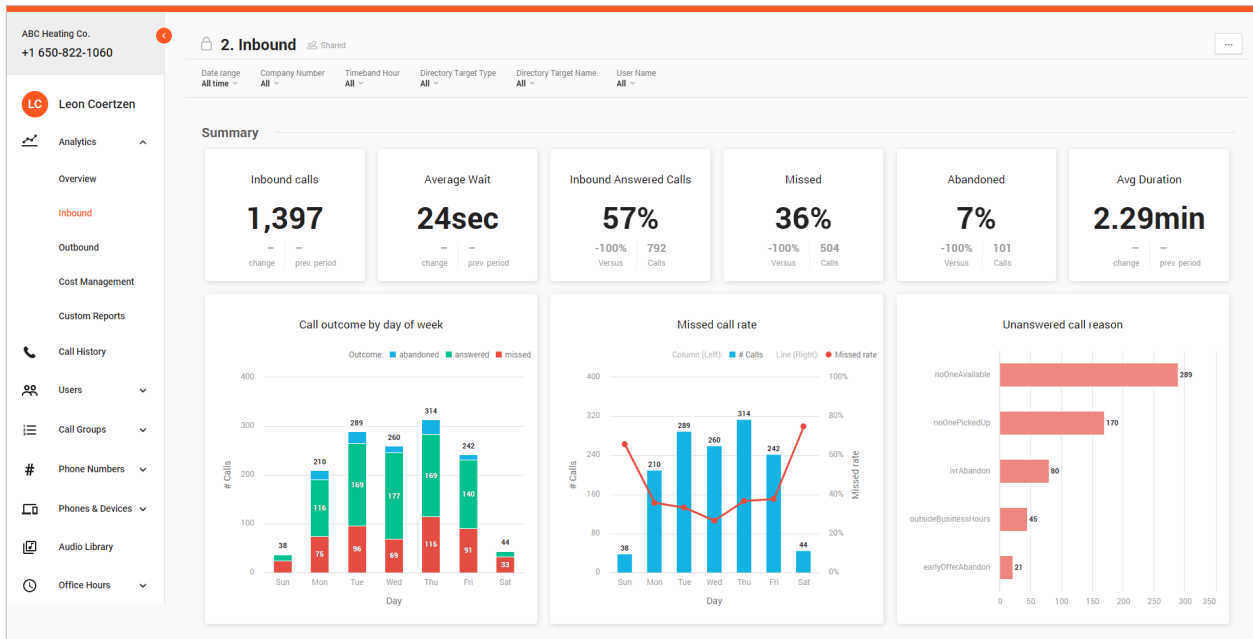
Average call duration by call group

Top 10 outbound callers

Understanding the pre-built dashboards

Inbound Dashboard

The Inbound dashboard provides more granular information around inbound call handling performance, including specific data around when your busiest days and hours of the day are, performance of individual users and heat maps to give a graphical overview of those busy times.



In particular the unanswered call reasons can provide helpful analysis for managing resourcing. For example, if the unanswered call reason relates to 'no-one available', this indicates you do not have sufficient staff logged into Spoke Phone to handle the volume of calls coming into your business. If, however, the unanswered call reason is 'no-one picked up', then this is a behavioral issue as the staff are available, but are missing the calls. And if the unanswered call reason is due to 'calls outside business hours', then maybe it would be worth extending your business hours to meet customer demand.

The key performance indicators provided are:

Total inbound calls

Average wait time in seconds

% inbound answered calls

% missed calls

% abandoned calls

Average call duration in minutes

Call out come by day of the week

Missed call rate by day of the week

Unanswered call reasons

Top 10 call groups by call volume

Missed call rate by call group

Longest wait time by call group

Missed call reason by call group

Top 10 call group users

Busy hours by day of the week - heat map

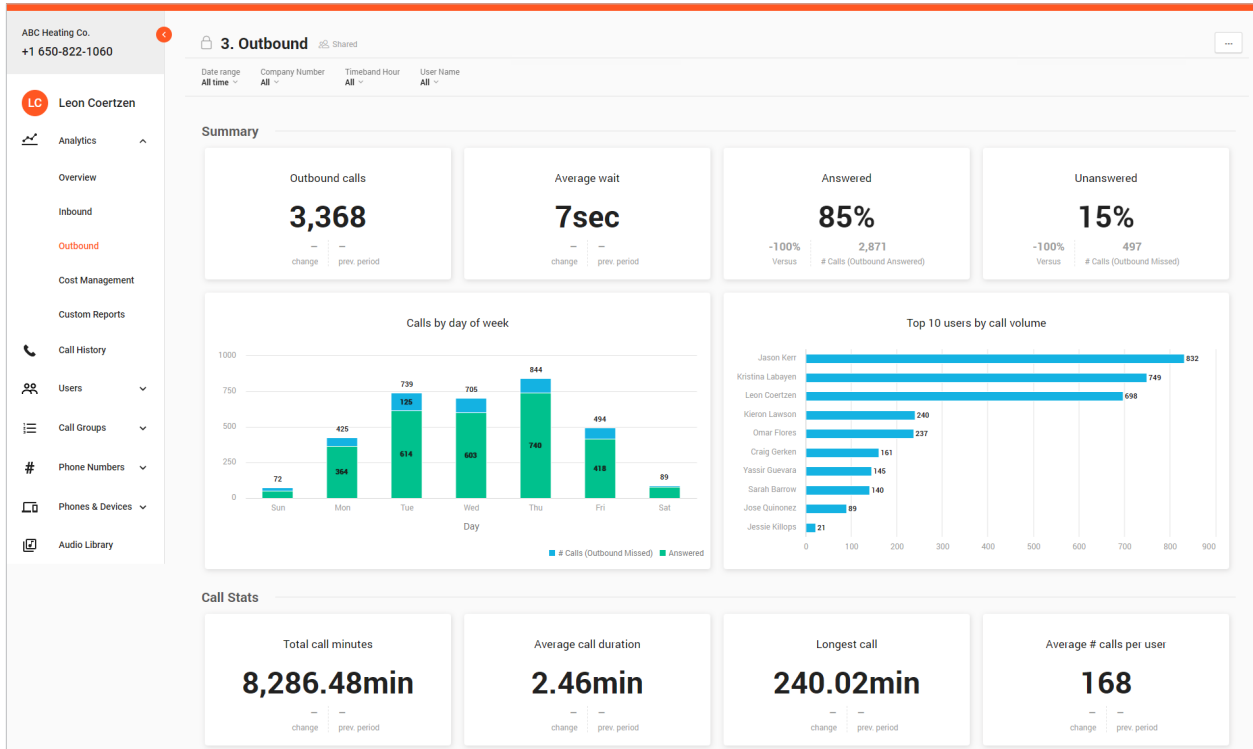
Average wait time by day of the week in hours - heat map

Table of performance by individual users

Understanding the pre-built dashboards

Outbound Dashboard

The outbound dashboard focuses on your customer pick up rate, top outbound performers, which days and time of day they are making calls and how long they are spending on each call.



The key performance indicators provided are:

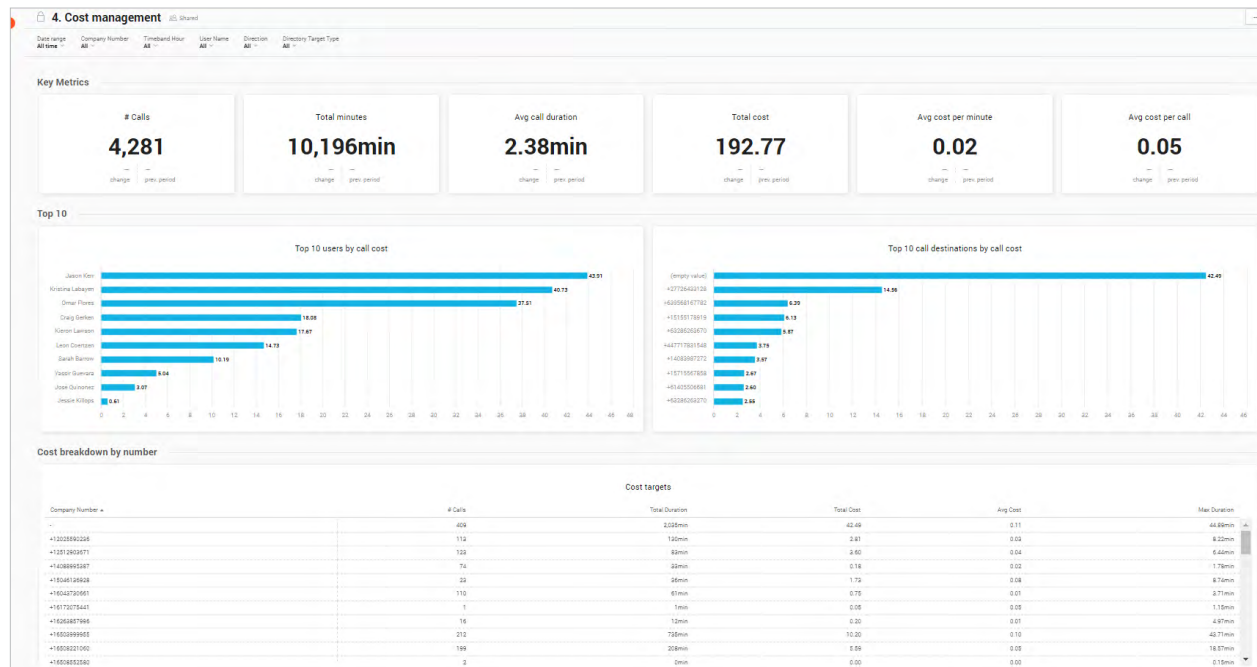
- Total outbound calls
- Average wait time in seconds
- % inbound answered calls
- % unanswered calls
- Calls by day of the week
- Top 10 users by volume
- Total outbound call minutes
- Average call duration in minutes
- Longest call
- Average number of calls by user
- Call volumes by day and hour - heat map
- Missed calls by day and hour - heat map
- Table of performance by top 10 outbound callers

Organizations with outbound sales teams will find this dashboard particularly helpful in order to determine the answer rate for their campaigns and also when the most successful times of day are to call prospects and leads. Also if their users are targeted based on the number of successful calls, this will provide the necessary data for performance management.

Understanding the pre-built dashboards

Cost Management

The Cost Management dashboard is extremely helpful in understanding your variable call costs. Whether you recharge internal departments for calls made on their behalf, or represent different brands, knowing exactly how much those calls are costing is invaluable.



The key performance indicators provided are:

Total calls

Total minutes

Average call duration in minutes

Total cost

Average cost per minutes

Average cost per call

Top 10 users by call cost

Top 10 destinations by call cost

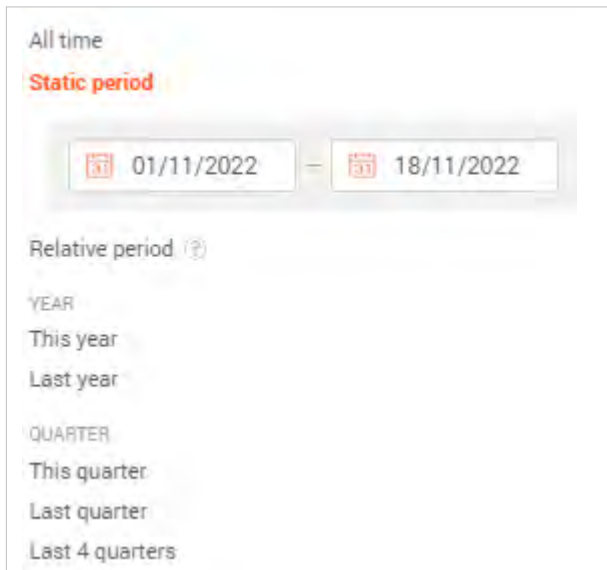
Table of breakdown by phone number

Being able to filter down to individual incoming phone numbers, outbound call targets or users allows you to manage budgets effectively and flag concerns if certain numbers/ destinations are being called more than they should be.

Adding filters

Each of the pre-built dashboards can be filtered to drill down into the data provided. The filters available are as follows:

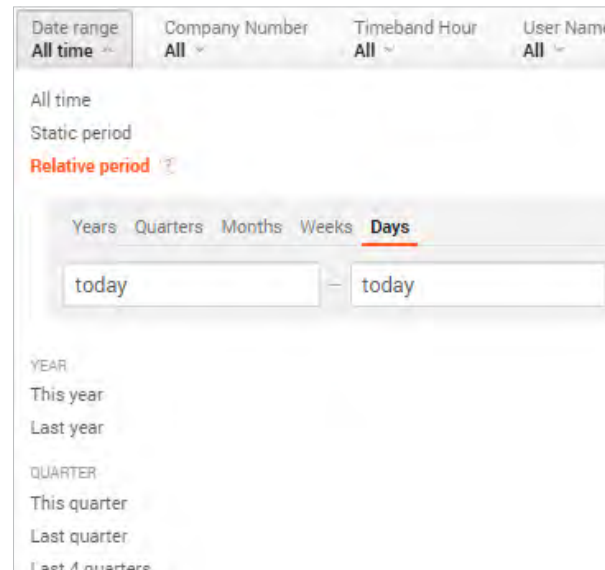
Date Range



The screenshot shows a filter interface with the following elements:

- At the top, it says "All time".
- Below that, "Static period" is highlighted in red.
- A date range is selected: "01/11/2022" to "18/11/2022", with calendar icons on either side.
- Below the date range, "Relative period" is shown with a help icon.
- Under "Relative period", there are two sections: "YEAR" and "QUARTER".
- Under "YEAR", the options are "This year" and "Last year".
- Under "QUARTER", the options are "This quarter", "Last quarter", and "Last 4 quarters".

The date range filter is available in both static and relative time periods. The static time period is for a set time period, such as this quarter. When that time period is selected, your comparative data will be the previous quarter. In addition you can use the date picker as illustrated above to choose a specific date range which may be a number of days, weeks or months.



The screenshot shows a filter interface with the following elements:

- At the top, there are four dropdown menus: "Date range" (set to "All time"), "Company Number" (set to "All"), "Timeband Hour" (set to "All"), and "User Name" (set to "All").
- Below these, it says "All time" and "Static period".
- "Relative period" is highlighted in red.
- Below "Relative period", there are tabs for "Years", "Quarters", "Months", "Weeks", and "Days". The "Days" tab is selected and underlined.
- A date range is selected: "today" to "today", with a minus sign between the two boxes.
- Below the date range, there are two sections: "YEAR" and "QUARTER".
- Under "YEAR", the options are "This year" and "Last year".
- Under "QUARTER", the options are "This quarter", "Last quarter", and "Last 4 quarters".

With a relative time period, you are able to select data on a from/to basis - such as yesterday to today or if you want to see just the current day's stats, then today–today is great for monitoring intra-day KPI performance.

Adding filters

The image displays two screenshots of the Spoke Phone interface's 'Company Number' filter. The left screenshot shows the filter set to 'All', with a search bar and a list of 10 phone numbers, all of which are selected with red checkmarks. The right screenshot shows the filter set to 'None', with a search bar containing '+44'. Three phone numbers are listed below the search bar, all of which are unselected (checkboxes are empty).

Company Number	Timeband Hour
All	All

Search...

Select all Clear

-
- +12025590236
- +12512903671
- +14088995387
- +15046136928
- +16043730661
- +16172075441
- +16263857996
- +16503999955
- +16508221060
- +16508552580

Company Number	Timeband Hour
None	All

Search +44

Select all Clear

- +442033221971
- +447700175479
- +447723497939

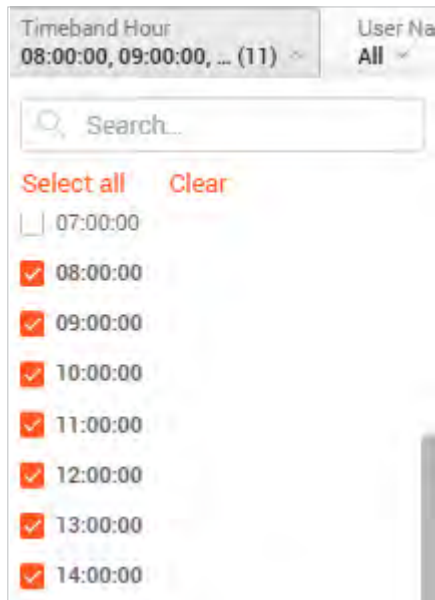
Cancel Apply

Company Number

The company number filter allows you to drill down into the performance of specific lines into your organization. To select certain numbers click on 'clear' and then make your selection. Or if you want to search for all numbers with a particular country code or local code then you can simply put that into the search bar and then select the numbers which appear, click apply and the dashboard will reflect data for those numbers only.

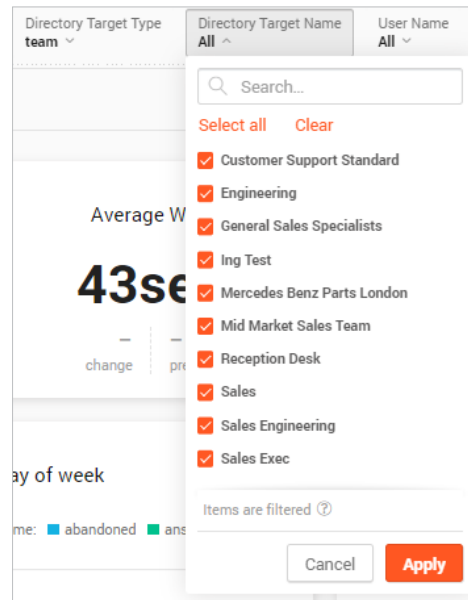


Adding filters



Timeband Hour

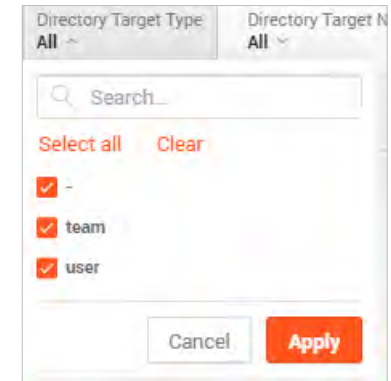
The timeband filter provides the ability to look at data for a single hour or a set number of hours. This might be helpful to understand peak periods, such as how many calls you are getting on a Monday morning between 9-10am or outside of business hours.



Directory target type, target name and user name

In the Inbound dashboard, the directory target type allows you to filter by your call groups and/or your users. If 'team' is selected as the target type then it will only show the call groups in the directory target name filter. Alternatively you can also select 'user' to filter down to the specific users in those teams. Or select 'user' only to see a pick list of users to select from.

Please note that in the overview and outbound dashboards, you will only have the option of selecting individual users, as call group data is restricted to inbound calls only.



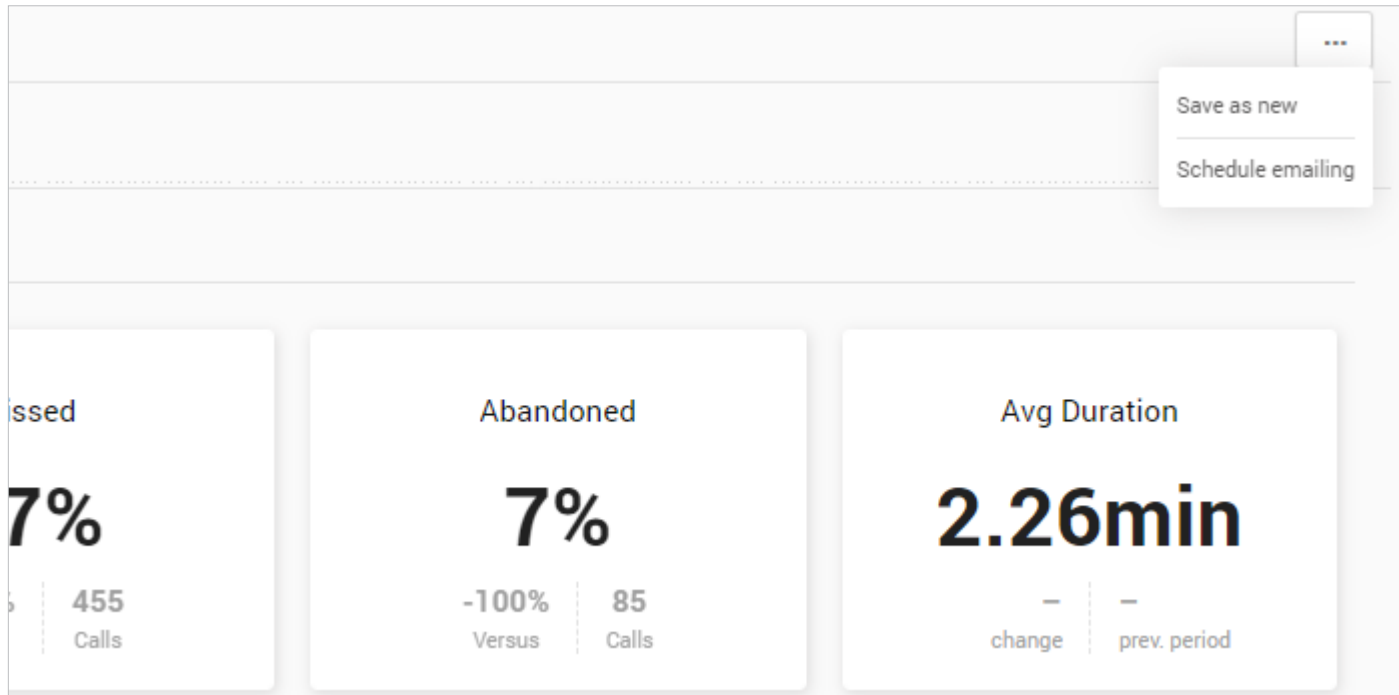
Setting alerts on KPIs

For many of the KPIs in the dashboards, you have the ability to be notified if the thresholds set for those KPIs are exceeded. If you hover over the top right hand corner of the metric, you will see the alarm bell. Click on the bell and it will open up the alert options, which will allow you to set a threshold above or below a certain number. In this example if the number of unanswered calls goes above 20%, then the alert will be triggered and an email warning will be sent to the user who created the alert.

The image shows a KPI card for 'Unanswered' calls with a value of 34%. Below the value, it shows a -2% change from the previous month's 35%. An alarm bell icon in the top right corner of the card is highlighted, and a modal window is open to the right, allowing the user to set an alert. The modal is titled 'Email me when this KPI is' and has a close button (X) in the top right. It contains a dropdown menu set to 'above', a text input field with '20' and a '%' symbol, and the text 'in this month' with a calendar icon. Below this, it says '3 more filters applied'. At the bottom of the modal are two buttons: 'Set alert' (orange) and 'Cancel' (white).

Copying and amending pre-built dashboards

In the top right hand corner of the dashboard click on the 3 dots to expand the options. The 'Save as new' option will create a duplicate dashboard which can be customized to your specific needs.



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Copying and amending pre-built dashboards

1. Give your dashboard a name and then click create dashboard.

Save dashboard as new ✕

Give your new dashboard a new descriptive name, so it's easier to find it later on.

Alerts and email schedules will not be duplicated

Cancel **Create dashboard**

2. You will notice that the dashboard is now showing as 'private'. This dashboard now only belongs to you.

My daily dashboard Private

Date range	Company Number	Timeband Hour	Directory Target Type	Directory Target Name
All time	All	All	All	All

3. To amend your dashboard go to the Custom report tab, find the dashboard you have cloned and click on the action button. This will launch a new window.

Analytics

- Overview
- Inbound
- Outbound
- Cost Management
- Custom Reports**

↑ NAME

- CSM Team Stats
- My daily dashboard
- Sales Team
- Today's Overview
- Today's stats

4. Click on the edit button to start making changes to your dashboard.

Edit Share ...

Missed	Abandoned	Avg Duration
37%	7%	2.26min

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Copying and amending pre-built dashboards

You can update your filters, such as changing the date to 'today' and can edit or remove any metrics you do not need by simply clicking on the metric and selecting the edit option or selecting remove from dashboard.

The screenshot displays the 'My daily dashboard' interface. At the top, there are filter controls for Date range (Today), Company Number (All), Timeband Hour (All), Directory Target Type (All), Directory Target Name (All), and User Name (All). Below the filters is a 'Summary' section with three key metrics: Inbound calls (12, up 100% from 6), Average Wait (16sec, down 12% from 18sec), and Inbound Answered Calls (42%, down 92% from 5). A chart titled 'Call outcome by day of week' shows a bar for Friday with 12 total calls, consisting of 5 answered (blue) and 7 missed (green). A context menu is open over the chart, offering options: Configuration, Interactions, Edit, and Remove from dashboard.

Drag to add

NEW ITEM

- Insight
- Key Performance Indicator
- Attribute Filter

SAVED INSIGHTS

Search all insights...

created by me all

- Team report NOV 4
- Missed cal...ime of day NOV 4
- Test webinar SEP 9
- Sarah Test SEP 3
- Donut Sarah SEP 2
- SB Donut SEP 2
- Donut SEP 2
- Calls by call type SEP 2
- calls by call type SEP 2
- Yesterday SEP 2
- Breakdown...m member AUG 30
- Calls by c...vious week AUG 30
- Calls by Call Type AUG 30
- CSM Team ...Last Week AUG 30

My daily dashboard Private

Date range: Today | Company Number: All | Timeband Hour: All | Directory Target Type: All | Directory Target Name: All | User Name: All

Summary

Add Description here...

Inbound calls
12
100% change | 6 prev. day

Average Wait
16sec
-12% change | 18sec prev. day

Inbound Answered Calls
42%
-92% Versus | 5 Calls

Call outcome by day of week

Outcome: answered missed

Day	answered	missed	Total
Fri	5	7	12

Call outcome by day of week

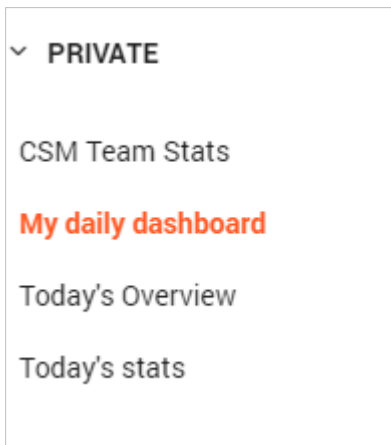
- Configuration
- Interactions
- Edit
- Remove from dashboard

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Copying and amending pre-built dashboards

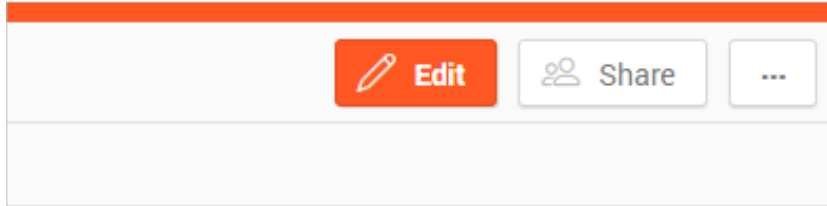
Any new metrics you want to add can be dragged and dropped from the selections in the far left hand column. You have the option of adding insights that you have created (more of this on page 20), or insights created by other users. You can also drag in new KPIs. To change the layout, simply drag and drop the reports and KPIs to where you would like them to be positioned. Once you have all the metrics in place and your filters set, save your dashboard.

Your new dashboard will now appear in your 'private' list.

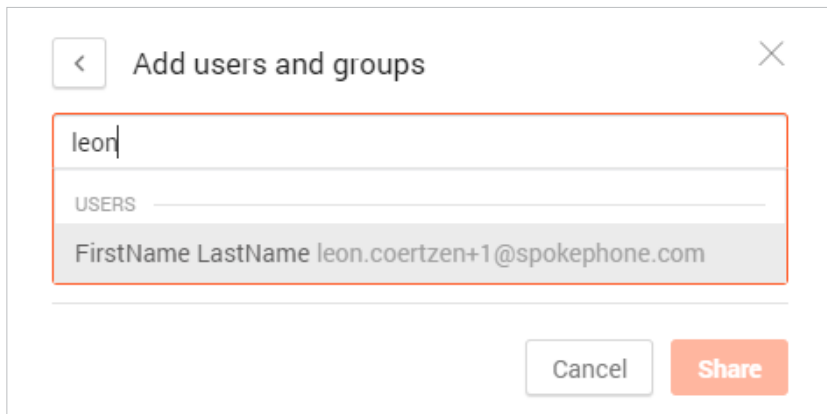


Sharing, exporting and scheduling dashboards

Once you have created your new dashboard, you now have the ability to share it with others. The share button will be visible next to the edit button.

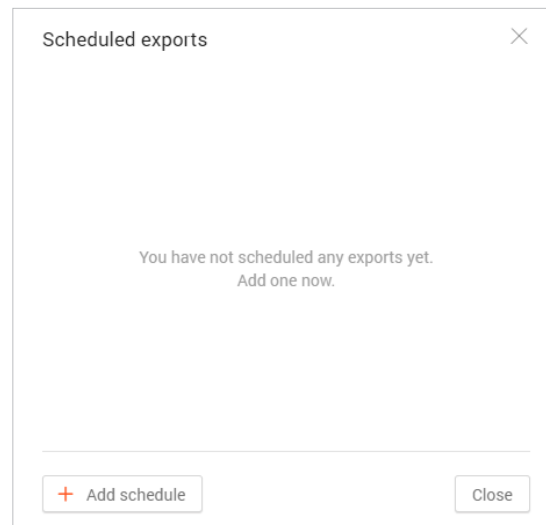
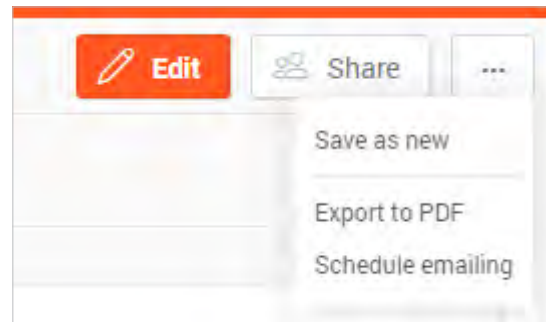


Simply type in the names of the people you want to share the report with and click share. Please note the recipients must have analytics permissions (either create or view) within the Spoke admin portal.



If you want to share either a pre-built or custom dashboard with someone who does not have analytics permissions, then this is possible either through our export or scheduling options.

In the top right hand corner, click on the 3 dots and this will give you the options for Export to PDF or Schedule emailing.



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Sharing, exporting and scheduling dashboards

The PDF export will be sent to you for onward transmission to your required recipients. The scheduling option allows you to automate this function and ensure a regular delivery of the report to either yourself or your required recipients.

Click on the Schedule emailing option and Add schedule. Add your colleagues' details, your message and then set the frequency and time of when you want the scheduled report to be sent. Click 'Schedule' and you can now sit back and let the system send the updated report every morning!

Schedule export ✕

To: Sarah Barrow | leon.coertzen+1@spokephone.com ✕

Subject: My daily dashboard

Message: Hey Leon
Here's the daily stats for our team. Enjoy!

Attachments: PDF My daily dashboard
[Select attachments](#)

First occurrence: 18/11/2022 08:00 AM GMT+00:00 Dublin

Repeats: Daily

Cancel Schedule

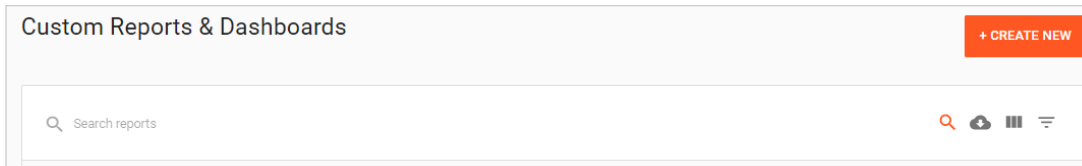
Creating custom reports and dashboards

We have previously looked at amending the pre-built dashboards to include additional metrics, rearranging the layout or deleting existing metrics.

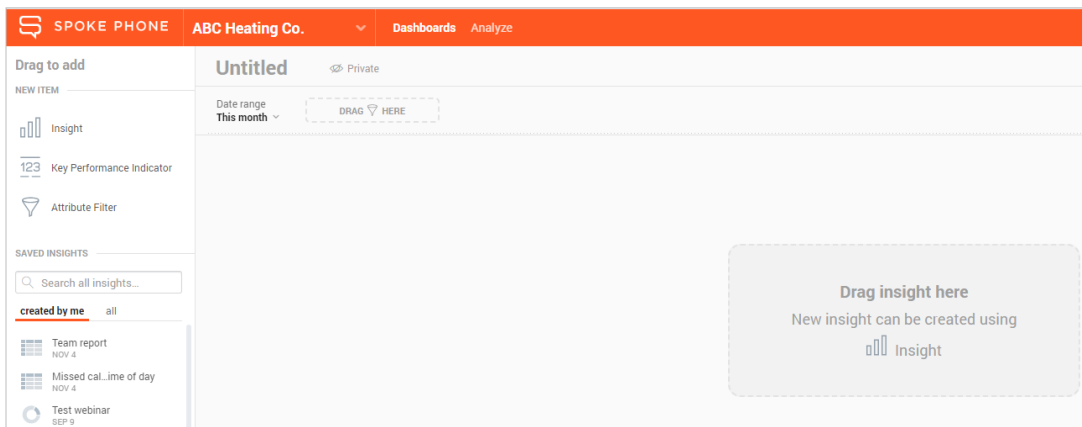
However you may prefer to create custom reports and dashboards from scratch - such as specific team reports.

In order to create a custom dashboard, you first need to create the individual reports called 'insights' that will populate your dashboard. Think of these as the building blocks of your dashboard. Insights allow you to display data as charts, graphs and tables; slice and filter the data and change the way the data is visualized.

Go to Custom reports and click the 'Create New' button.



You will be taken to a blank dashboard canvas.



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Creating custom reports and dashboards

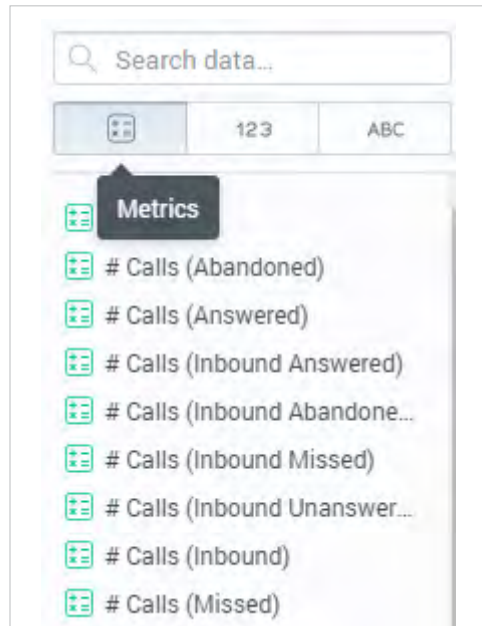
Click on Analyze to be taken to the Analytical Designer where you will create your insights.

The screenshot shows the 'Untitled insight' workspace in the Spoke Phone Analytical Designer. On the left is a data source list with categories like '# Calls' and '# Users'. The main workspace is divided into sections for 'FILTERS', 'METRICS', 'ROWS', and 'COLUMNS', each with a dashed box and a 'DRAG' prompt. A large dashed box on the right contains the instruction: 'Drag 123, [icon] or ABC here. They are located in the panel on the left.'

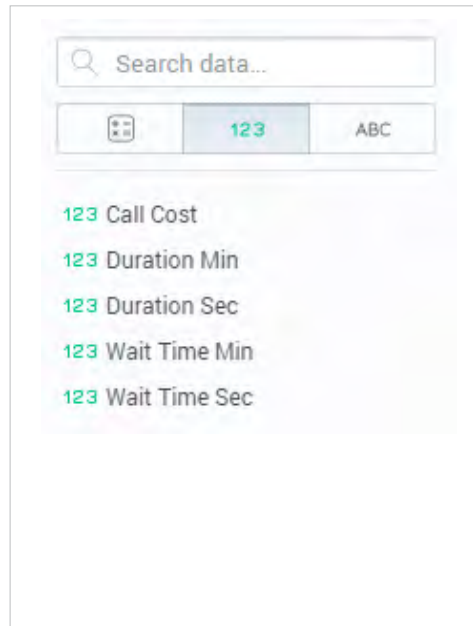
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Creating custom reports and dashboards

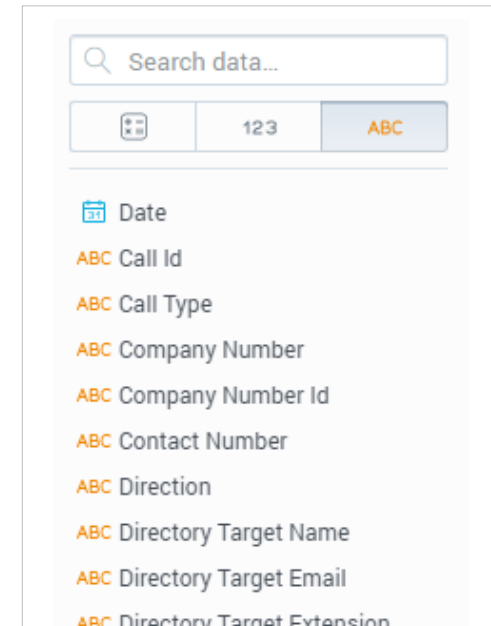
On the far left hand side is the 'Data Catalog' which contains the attributes, facts and metrics available for your insights.



The first tab provides your **Metrics**. These are expressions of numerical data (think of columns in a table) - number of calls/users, percentages, averages, max and totals. For example % of inbound calls answered or average inbound wait time.



The second tab provides your **Facts**. These are time-based calculations, such as duration in minutes and seconds, wait times in minutes and seconds and call cost.



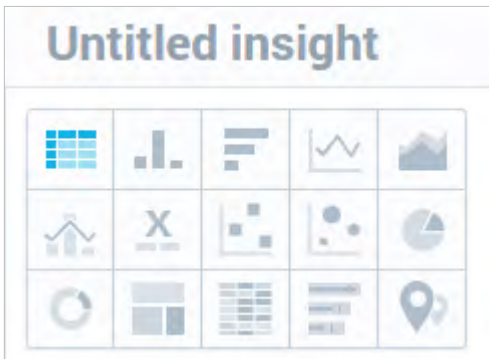
The third tab provides your **Attributes**. These are non-measurable descriptors used to break down metrics and facts, such as call outcomes, call direction, user names or target types. For example the team members whose data you want to view. Attributes would normally be your rows across in a table.

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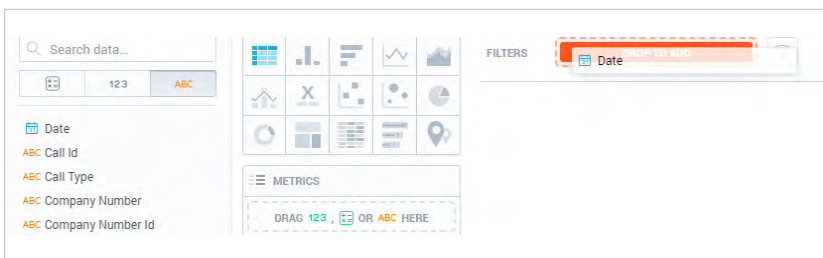
Creating custom reports and dashboards

Let's create an insight to illustrate how they can be used.

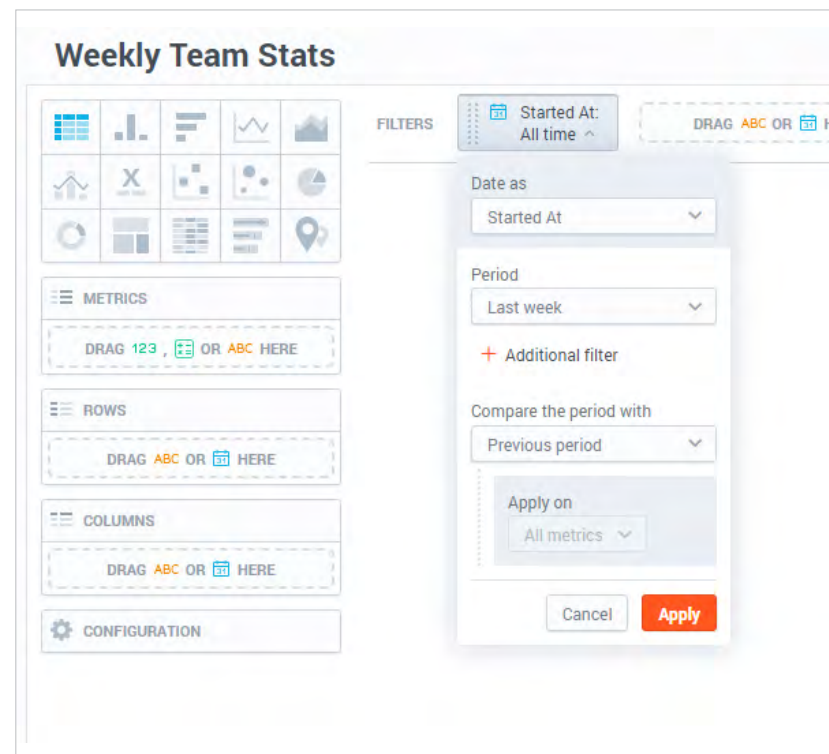
Step 1 - Click on 'Untitled Insight' and give your insight a name.



Step 2 - Find the date option in your attribute tab and drag it across to the filter.



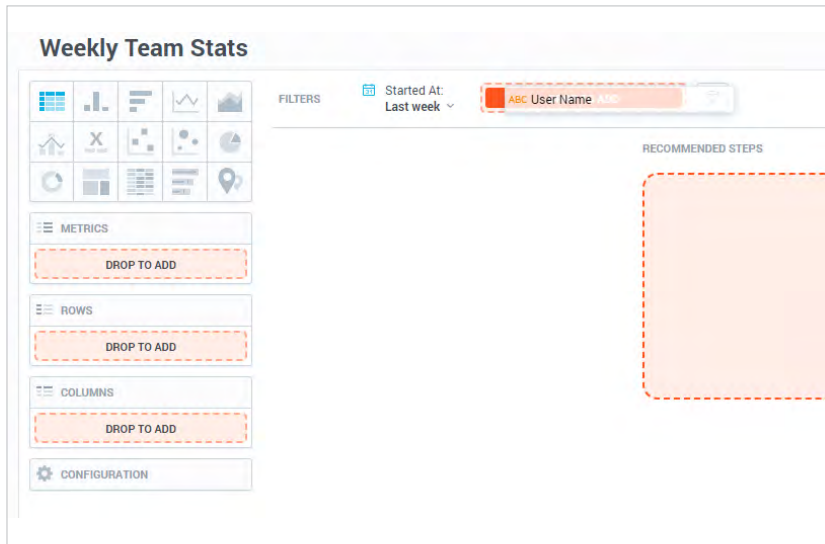
Choose the date period you want your insight to look at. In this example I want to look at last week and compare it with the previous week. Set your date field and click apply.



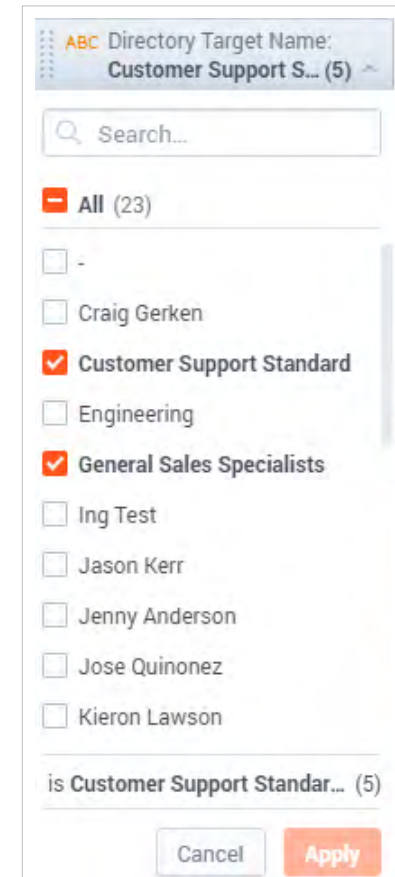
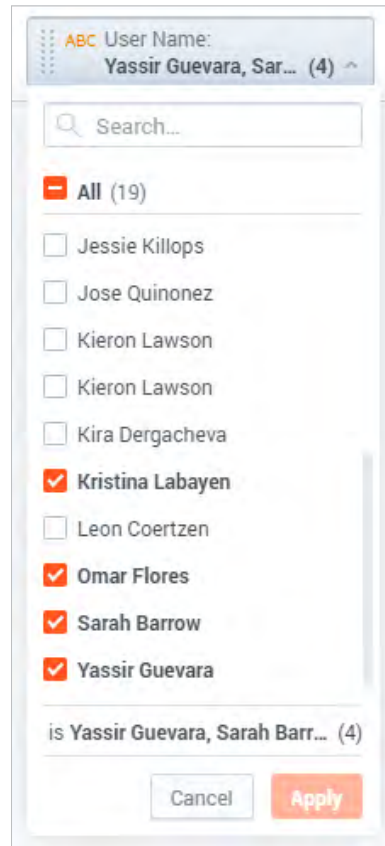
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Creating custom reports and dashboards

Step 3 - Find the User Name field in attributes and drag it across to the filter.



Deselect the 'all' option and click on the names of the team members you want the report to cover (note: if you are only wanting to look at inbound calls to call groups, then select the Directory Target Type and choose the relevant call groups you want to see).



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Creating custom reports and dashboards

Step 4 - Drag the User Name field to the rows field and it will display the names of the users you previously selected in your filter. You are now ready to start building up your report with the key metrics you want to measure.

The screenshot shows the Spoke Phone Analytics dashboard configuration interface. On the left, there is a search bar labeled "Search data..." and a filter bar with "123" and "ABC". Below these are several filter categories: "Date", "ABC Call Id", "ABC Call Type", "ABC Company Number", "ABC Company Number Id", "ABC Contact Number", "ABC Direction", "ABC Directory Target Name", "ABC Directory Target Email", "ABC Directory Target Extension", "ABC Directory Target Id", "ABC Directory Target Type", "ABC Has Voicemail", "ABC Minutes After Midnight", "ABC Outcome", "ABC Outcome Id", and "ABC Outcome Reason".

In the center, there are four main sections for report configuration:

- Visualizations:** A grid of icons representing different chart types: bar, line, pie, area, and scatter.
- METRICS:** A dashed box containing the text "DRAG 123, [filter icon] OR ABC HERE".
- ROWS:** A dashed box containing the text "DRAG ABC OR [filter icon] HERE". The "ABC User Name" field is currently selected and shown above this box.
- COLUMNS:** A dashed box containing the text "DRAG ABC OR [filter icon] HERE".
- CONFIGURATION:** A section with a gear icon.

On the right side, there is a "FILTERS" section with a calendar icon. It lists the following filtered users:

- User Name ▲
- Kristina Labayen
- Omar Flores
- Sarah Barrow
- Yassir Guevara

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Creating custom reports and dashboards

Step 5 - Go to your metrics tab in the Data Catalog and start pulling across the relevant data to your metrics field. Tip: use the search bar to find the metric you are looking for. In this example we have pulled into the metrics fields the following:

- # calls
- Average call duration in minutes
- Max wait time in seconds
- Total cost

We are then slicing the data to include call outcome and direction, which provide a more granular view, in an easy to read format direction and outcome can be found in your attributes tab and drag direction into 'Rows' and outcome into 'Columns'.

Save the insight and it will now be available in the 'created by me' insights, ready to pull into your dashboard.

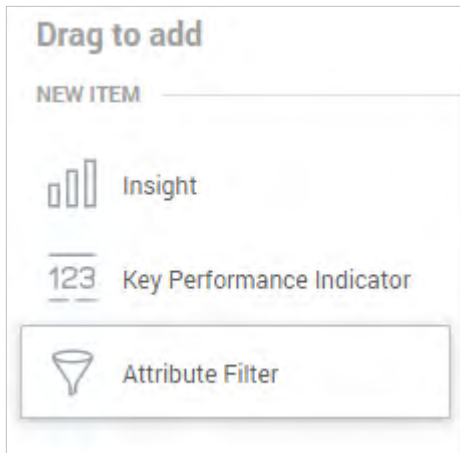
Weekly Stats

FILTERS: Started At: Last week, ABC User Name: Yassir Guevara, Sar... (4)

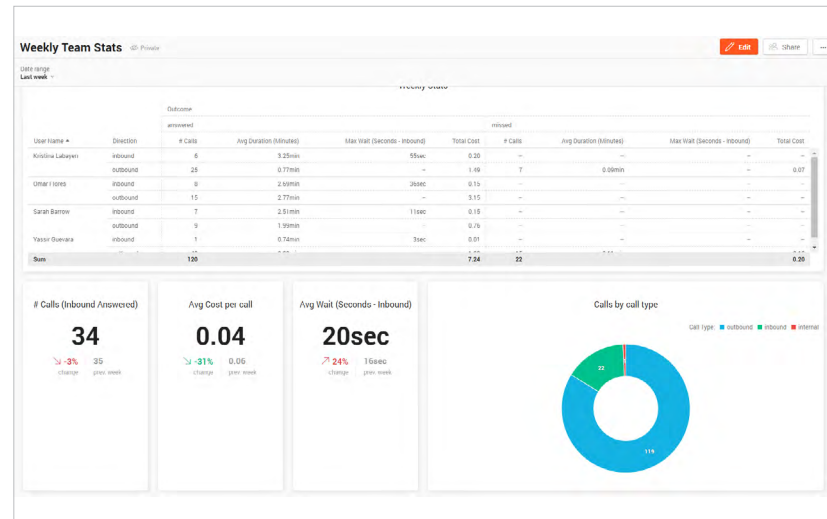
User Name	Direction	answered				missed			
		# Calls	Avg Duration (Minutes)	Max Wait (Seconds - Inbound)	Total Cost	# Calls	Avg Duration (Minutes)	Max Wait (Seconds - Inbound)	Total Cost
Kristina Labayen	inbound	6	3.25min	55sec	0.20	-	-	-	-
	outbound	25	0.77min	-	1.49	7	0.09min	-	0.07
Omar Flores	inbound	8	2.69min	36sec	0.15	-	-	-	-
	outbound	15	2.77min	-	3.15	-	-	-	-
Sarah Barrow	inbound	7	2.51min	11sec	0.15	-	-	-	-
	outbound	9	1.99min	-	0.76	-	-	-	-
Yassir Guevara	inbound	1	0.74min	3sec	0.01	-	-	-	-
	outbound	49	0.28min	-	1.33	15	0.11min	-	0.13
Sum		120			7.24	22			0.20

Creating custom reports and dashboards

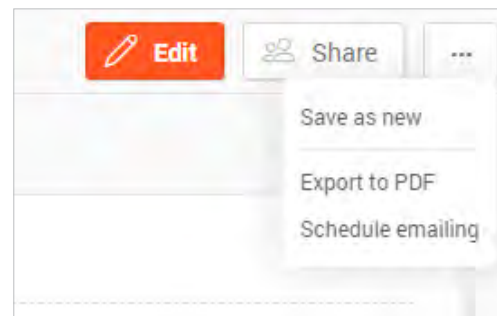
Step 6 - Drag the insight into your dashboard canvas. You can repeat this step with additional insights you create or add in some Key Performance Indicators, which can be found in the top left column.



Now you have a completely custom dashboard for your team.



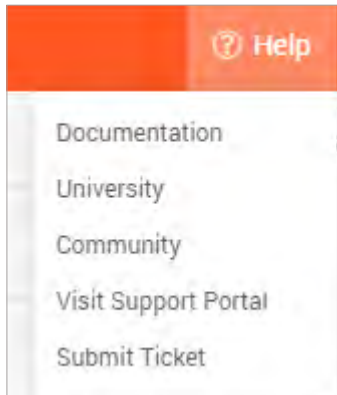
In the same way as the cloned dashboards we created earlier, this dashboard is private to you. It can be shared by using the share button or clicking on the 3 dots and scheduling as before.



Help and support

When you are viewing a custom dashboard, there is a help icon in the top right hand corner of the orange bar. This will provide you with documentation and resources to better understand the analytics tool, as well as access to our support portal.

Note: the help icon is not available when viewing the pre-built dashboards.



THANK YOU



Spoke Phone