

Customer Service Metrics That Actually Matter

- Separate decision-grade metrics from vanity noise; link every KPI to retention, revenue, or cost
- Most dashboards track activity and speed, missing the “why” behind the number
- Shift from data-rich scoreboards to insight-driven operating loops
- Leave with a selection framework, lean metric set, governance rhythm, and 30-60-90 day plan



The Failure Mode Behind Most Metric Programs



- Dashboards describe the past, not where work is stuck or who owns it



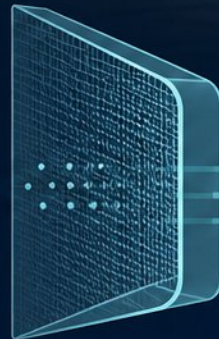
- Vanity metrics like ticket volume measure activity, not resolution



- Healthy CSAT can hide accumulated friction that quietly drives churn



- Goodhart's Law: when a measure becomes a target, it ceases to be a good measure



What Leading Metrics Actually Predict

MOMENT SCORE



EFFORT SCORE



- CES (Customer Effort Score) is the strongest predictor of churn



- Low effort drives repurchase and retention more reliably than delight



- CSAT captures a moment; NPS lags the decision to leave

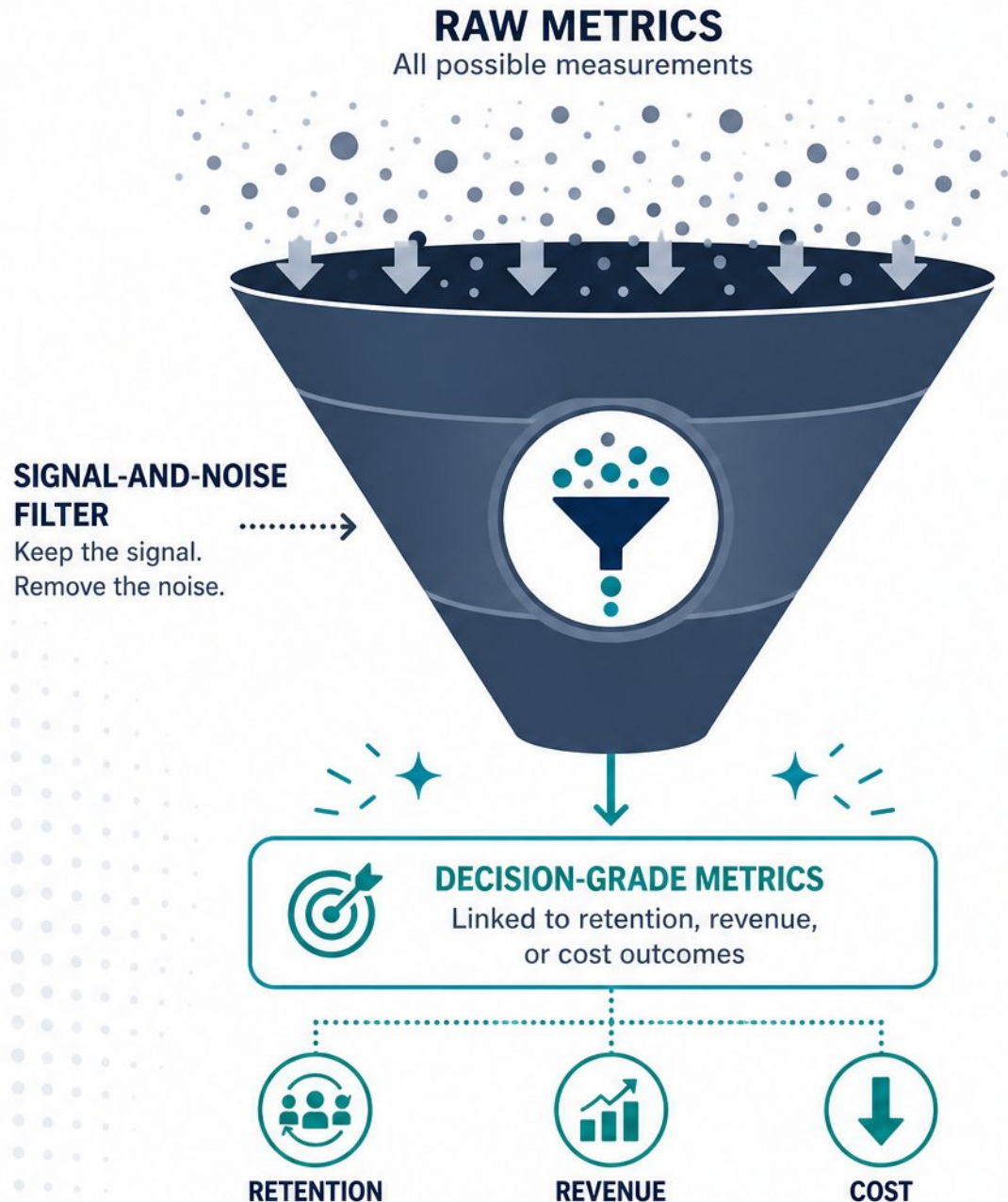


- Sentiment and churn-intent language lead scores by weeks



- FCR and resolution quality are the strongest operational levers

A Selection Framework for Decision-Grade Metrics



SELECTION PRINCIPLES



- Link every metric to retention, revenue, or cost outcomes



- Balance customer, operational, commercial, and employee views



- Use leading indicators for weekly action, lagging for reviews



- Screen metrics for controllability, predictiveness, gaming resistance, cost

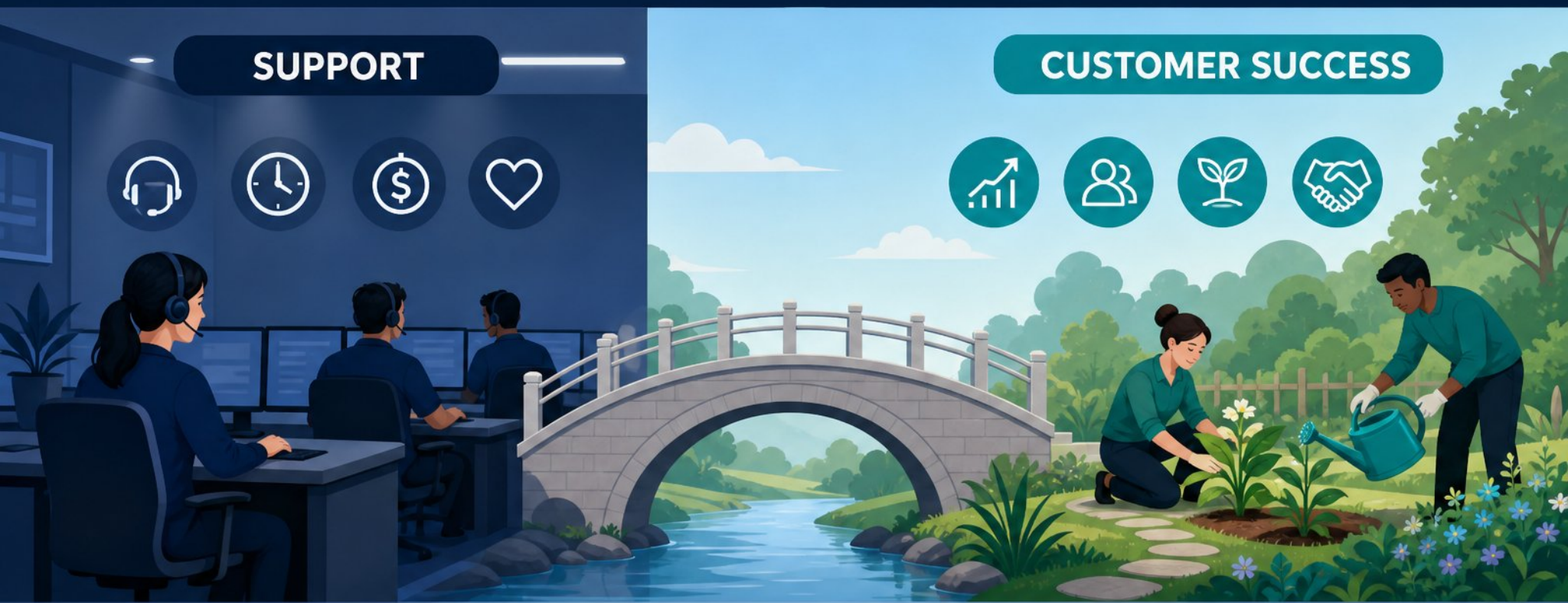


A Lean Core Metric Set



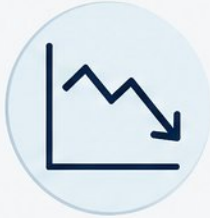
- Small core set: FCR, resolution rate, CES, CSAT, cost per resolution
- Pair speed metrics with quality metrics to prevent rushed work
- Track repeat contact rate and escalations as early friction signals
- Keep NPS as a quarterly pulse, never a weekly target

Support Metrics vs. Customer Success Metrics



- Support: Did we resolve it, how fast, at what cost, how did it feel?
- Customer Success: Are customers adopting, realizing value, renewing?
- Health scores blend usage trend, adoption depth, support friction, and relationship strength
- Keep team-specific signals visible; define shared ownership explicitly

Building Health Scores That Predict



- Weight usage trend over usage level; a sharp decline is a stronger risk signal than a low baseline



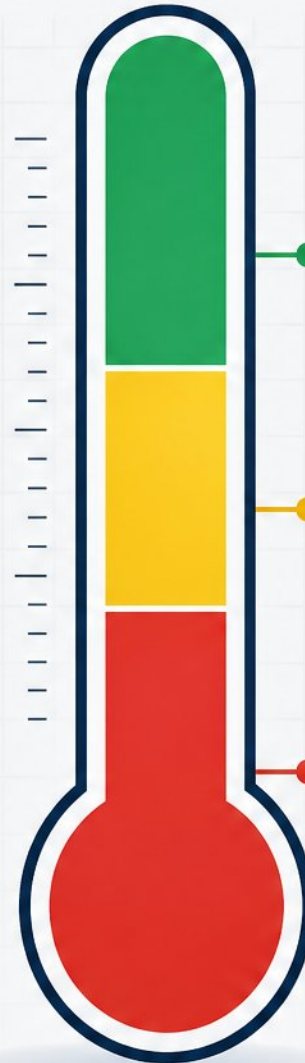
- Use hard overrides for critical events: departed champion, failed payment, or open severity-1 escalation



- Map tiers to plays: healthy = expansion, yellow = enablement, red = urgent intervention



- Validate quarterly: were churned accounts red or yellow 60-90 days before leaving?



HEALTHY
= EXPANSION

YELLOW
= ENABLEMENT

RED
= URGENT
INTERVENTION

Targets, Incentives, and the Gaming Trap



- Every target metric can be gamed



- Always pair a target metric with a health metric (e.g., FRT + CSAT)



- Avoid averages; use percentiles to reveal hidden friction



- High CSAT + low CES = agents absorbing system effort



- Measures become targets; focus shifts from outcomes to numbers



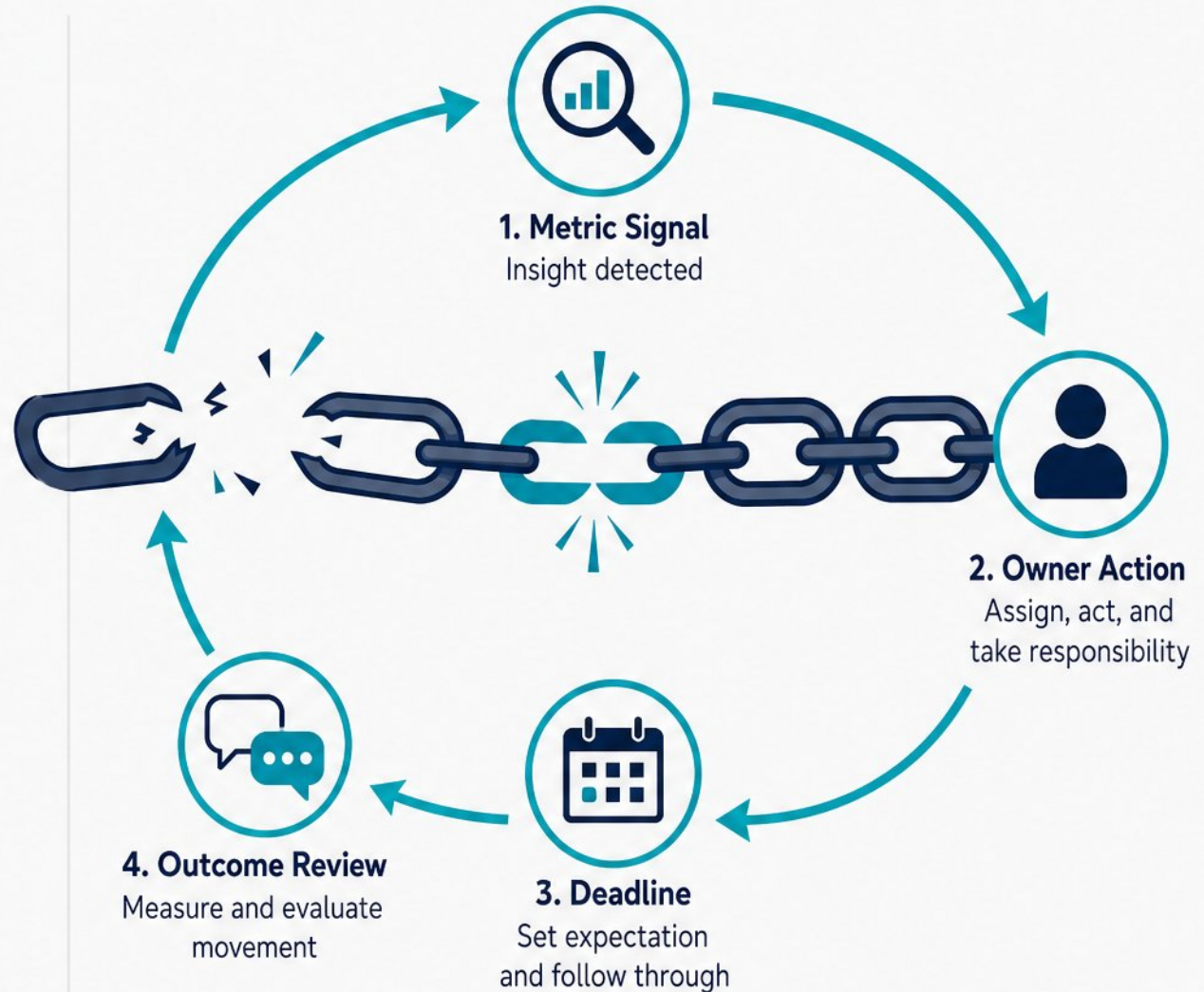
A Governance Rhythm That Keeps Metrics Honest

- Layer reviews: daily pulse, weekly functional, monthly scorecard, quarterly strategy
- Assign a named owner for every metric; committees cannot own numbers
- Separate metric definitions from ownership; document formulas and thresholds
- Treat metric retirement as normal governance, not failure



Insight to Action: Closing the Loop

- Every metric change triggers a response, owner, and deadline
- Segment by issue type, channel, tier, and time for root causes
- Detractors trigger recovery tasks; promoters trigger referral asks
- Recurring themes become improvement work, not one-off fixes
- Measure outcome movement, not just task completion



Dashboard Design for Different Roles



- Agents: today's queue, SLA risk, personal CSAT



- Team leads: workload balance, backlog aging, coaching



- Operations: capacity, queue health, cost per resolution

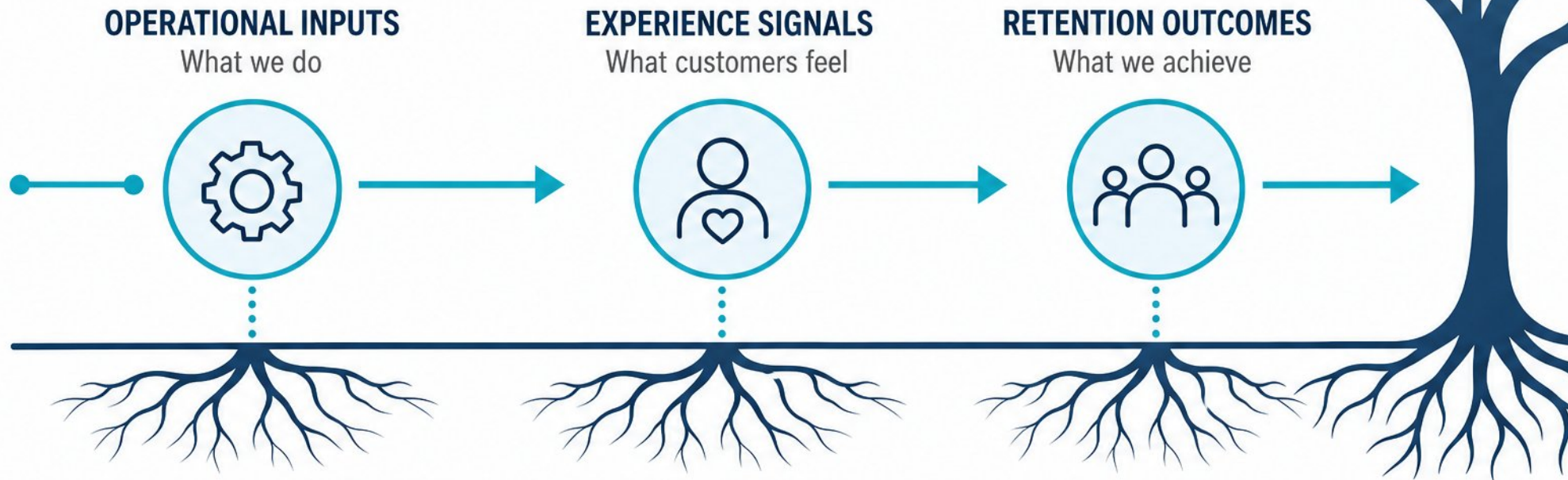


- Executives: trends tied to retention and revenue



- Limit dashboards to 5–8 primary metrics; drill down for detail

Leading and Lagging Indicators in Practice



- ✓ **Leading:** FCR, repeat contact rate, response time, adoption trend—enable weekly correction
- ✓ **Lagging:** NRR, churn, NPS, cost to serve—validate that improvements held
- ✓ **Build a causal chain:** operational inputs drive experience metrics, which drive retention and revenue
- ✓ If a leading indicator improves but outcomes don't follow, retire it and refactor the model

Common Pitfalls and How to Avoid Them



- Pair NPS with CES and qualitative verbatim to avoid tunnel vision



- Analyze churned cohorts separately to counter survivorship bias



- Align agent incentives with resolution, not speed, to prevent gaming



- Retire metrics that trigger no action; they are decoration

30-60-90 Day Action Plan



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/9b1fbd14/public