



The Guide to

CREATING A SUPPORT REPORT

That people will love to read!

With your

CX Support Leader & Coach
Andrew Ríos

RIOS MGMT
CX LEADER & COACH

Support is a gold mine of valuable insights

When you interact with customers all day every day, you gain incredible insights into how they use your product, and the challenges they face.

Being able to raise those back into the business for actionable change can be key in creating a better product and service for the future.

But getting started can be tough. What do you measure? What do you share with the business? What's valuable for them?

In this guide, you will find everything you need to get started with creating a Support Report that people will love to read.

*Rome wasn't built in a day! When building your **Support Report** the important thing is to start. Start simple, but start.*

In this guide

Components of a Support Report

What to include and why it matters

Best practices in showing metrics

Building a cadence with feedback

Components of Your Report

A successful Support Report shows a clear picture of the state of support in context.

It always starts with the 'why' and shows results in context.

The goal should be to relay the business impact, and always answer these three questions:

1. What are the facts?
2. What do they mean?
3. What are we doing about it?

A Support Report is a Journey



Questions Your Report Answers

Now that you know the main elements that make up a great Support Report, you'll need to answer specific questions.

By answering these 10 questions, you can paint a clear picture and relay the story of Support clearly.

Answer these questions with a mix of qualitative and quantitative information and keep the impact to the business top of mind.

What does this information mean?

Painting the Picture of Support

1 How are we servicing our customers?

2 How are we performing with supporting them?

3 How did they contact us? Why?

4 How are we resolving their issues?

5 What are they saying about us?

6 What can we celebrate?

7 What is the status of goals and major projects?

8 What is the impact to the business?

9 What do stakeholders care about, and how can they get more?

10 What story do we want to tell?

Tip: Resist the urge to get too granular. Focus on top-down reporting using the why.

Best Practices for Showing Metrics

Data and metrics can show a strong story. But they can also confuse or over-complicate without context.

Be intentional with how you go about showcasing the data to tell the story.

What are the facts?

Data, Metrics, and KPIs tell the facts.

What do they mean?

It's important to translate them into the context of the business.

What are we doing about it?

Show how data is actionable and create takeaways with next steps.

Your measurements tell the story

Showcase metrics and **graphs over time**. This will show trends compared to previous periods and provide relativity. A single snapshot of time does not show you the context.

Share **actionable insights** and next steps. It's great that the information is there, but what does it mean, and what are you going to do with that information? What can others do with it?

Make it **easy to for everyone to understand**. Numbers and graphs are great, but if they still leave people with questions, they may be counter-productive. Clarity is key!

Speak the language of your audience. What do they care about? Understanding what is important to your audience can help you to make the report more impactful and engaging.

Build a Cadence and get Feedback

Consistency is Key

Determine what frequency makes the most sense for your business.

- Weekly
- Monthly
- Quarterly
- Yearly

Depending on the cadence or combination of reports, you can determine what story and information is important to include.

*Just like your business, **your Support Report will evolve** with changing needs.*

*Start simple, and learn what is important to the business in order to **measure what matters***

Build relationships, and try to learn the language of stakeholders within your organization.

Different people will have different needs, and finding out what they care about can help you to make Support a value driver for them.

Asking questions and getting feedback can help you to tailor your Support Report to the needs of the business.

Now you're ready to make Support Report

that people will love to read!

Connect with me

My Mission is to partner with Customer Support Leaders to achieve their goals, work through team and organizational changes, and unlock their superpowers.

My hope is by sharing my 25 years of experience and lessons learned other Support Leaders can achieve their career goals and own their seat at the table!



Find me at <https://riosmgmt.com/>

Or connect with me on LinkedIn

