

Turn Support Data Into Business Influence

A practical field guide for building a Support Report leaders can understand, trust, and act on.

FACTS	MEANING	ACTION
What happened?	Why does it matter?	What's the next play?

COACH RIOS RULE

A Support Report is not a scoreboard full of numbers. It is a leadership tool that turns customer signals into the next business decision.

HOW TO USE THIS GUIDE

1. CAPTURE	2. CONNECT	3. COACH	4. COMMUNICATE
Collect the signals that matter.	Explain the customer and business impact.	Name the next play, owner, and ask.	Make the story clear in 60 seconds.

Start simple. Use one reporting period, identify the three signals that matter most, and run each through Facts → Meaning → Action. Your first report does not need to be perfect. It needs to be useful.

START SIMPLE • ITERATE OFTEN • MAKE IT PERSONAL • MAKE IT ACTIONABLE • BE CONSISTENT

Three questions. One business story.

Every section of your report should move the reader from evidence to understanding to a decision.

1 FACTS	2 MEANING	3 ACTION
What happened? Capture: volume, CSAT, SLA, backlog, escalations, contact reasons, channel mix, customer feedback, staffing, and capacity. Focus: material changes, customer signals, and operational truth. Avoid: a metric dump with no priority.	Why does it matter? Explain: what changed, why it changed, and whether it is a trend or an event. Connect: customer impact, team impact, business risk, and business opportunity. Avoid: making the reader interpret the data for you.	What's the next play? Name: the next step, owner, timeline, decision, investment, or partner. Clarify: what Support will do and where leadership is needed. Avoid: ending with an observation instead of a move.

COACH RIOS RULE

Don't dump everything you know. Show what matters.

EXAMPLE: CONTACT VOLUME

FACT

Inbound volume increased 22% week over week.

MEANING

Most growth came from billing contacts after a policy change.

ACTION

Billing and Support will update the notice by Friday; Support will track repeat contacts.

Coach Rios Pro Tip: One strong storyline beats 37 disconnected charts. If a metric does not help explain the state of Support or guide a decision, it may belong in the appendix.

Run the play: Facts → Meaning → Action

Use one row per meaningful signal. Validate the evidence before turning it into a recommendation.

FACTS	MEANING	ACTION
What happened? _____ — _____ — _____ —	Why does it matter? _____ — _____ — _____ —	What's our next play? _____ — _____ — _____ —

ADD THE OWNERSHIP LAYER

NEXT PLAY	OWNER	BY WHEN	DECISION / HELP NEEDED

COACH RIOS RULE

Data should lead somewhere.

Cadence: Weekly = emerging signals. Monthly = patterns and story. Quarterly = priorities and investment. Yearly = history that prepares the business for what comes next.

Let AI speed up the reps - not call the play.

AI changes where you spend your time. Less energy formatting the report. More energy understanding the business.

ANALYST Find trends, anomalies, and questions worth investigating.	EDITOR Turn operational language into concise executive communication.
CHALLENGER Surface assumptions, gaps, and the questions leaders may ask.	HISTORIAN Compare reporting periods and identify persistent changes.
BUILDER Create first drafts, charts, formulas, and repeatable templates.	THOUGHT PARTNER Explore the meaning behind the data before choosing the story.

COACH RIOS RULE

AI proposes. Coach validates.

THE SAFE HANDOFF

1. GIVE IT THE RECEIPTS	2. ASK FOR QUESTIONS	3. VALIDATE THE OUTPUT
Share the current report, prior periods, staffing changes, incidents, customer feedback, and relevant business context.	Pressure-test the story: What changed? What am I missing? What would my CEO, COO, CFO, or Product leader ask?	Check the numbers, challenge the interpretation, separate correlation from causation, and own the recommendation.

Use AI to accelerate your thinking - not replace it. You know the customers, the team, the operation, and the business. The Support Leader still owns the next play.

Better prompts. Better practice. Better report.

Copy, adapt, and use these prompts as a pre-meeting sparring session.

FIND THE SIGNAL	Review this data. What changed, what stands out, and what deserves investigation? Rank the findings by potential customer and business impact.
COMPARE PERIODS	Compare these reporting periods. What improved, what deteriorated, which trends persisted, and what looked like noise before but now looks meaningful?
TEST THE MEANING	Give me three possible explanations for this change. What evidence would confirm or reject each explanation? Do not assume correlation is causation.
PRESSURE-TEST	If you were my CEO, COO, CFO, or Head of Product, what questions would you ask after reading this report? What claims need stronger evidence?
DEVELOP ACTIONS	Based only on the validated findings, suggest three reasonable next plays. For each, include an owner, timeline, expected outcome, risk, and data needed.
CUT THE CLUTTER	What can I remove without losing the story? Identify metrics, charts, or details that do not change understanding or support a decision.
EXECUTIVE EDIT	Rewrite this section for an executive audience using Facts → Meaning → Action. Keep it concise, specific, and free of unsupported claims.
THE BONUS QUESTION	What am I not asking that I should be?

COACH RIOS RULE

Give AI the receipts. Then ask it to challenge the story - not invent one.

The Coach Rios 10

A strong Support Report should eventually answer all ten. It does not need ten separate charts.

- ☐ 1. What happened?
- ☐ 2. What changed?
- ☐ 3. Why did it change?
- ☐ 4. What are customers telling us?
- ☐ 5. Where are customers struggling?

- ☐ 6. How is the team performing?
- ☐ 7. What is working?
- ☐ 8. What risk should leadership know about?
- ☐ 9. What opportunity should leadership know about?
- ☐ 10. What's the next play?

THE 60-SECOND TEST

- ☐ Can a leader understand the state of Support in 60 seconds?
- ☐ Is the biggest customer signal clear?
- ☐ Is the biggest business risk or opportunity clear?
- ☐ Did I explain what changed and why?
- ☐ Is the next play clear - including owner and timing?
- ☐ Does leadership know where I need their help?

COACH RIOS RULE

If not, keep coaching the report.

THE FINAL PLAY

**Facts tell the business what happened. Meaning explains why it matters.
Action establishes what happens next.**

AI made building the Support Report easier. It did not make leadership easier.
The Support Leader still owns the next play.

- Coach Rios