



The Dashboard Health Assessment

A Contact Centre Leader's Guide to Closing the Insight Gap

**Includes: Self-Assessment • Health Checklist • Action Roadmap
You Can't Improve What You Can't Explain**



1. Introduction — The Insight Gap in Contact Centres

Every contact centre leader knows the feeling.

You open the dashboard.

- Abandonment is up.
- Average handle time is climbing.
- NPS has dipped again.
- And then... nothing.

The dashboard shows you what happened. It doesn't tell you why or what to do next.

That gap between **visibility and explanation** isn't a flaw in any single tool. It's a sign of how far the questions being asked have evolved. Contact centres were built, over many years, to answer "what happened?" Today's leaders are being asked a different question by their executives, their boards, and their customers: "why is this happening, and what are we doing about it?"

This ebook is designed to help you answer that question with confidence. It includes:

- A self-scored Dashboard Health Assessment across five key capability areas
- A quick-reference checklist you can run with your team in under 15 minutes
- A practical roadmap for closing the gaps you find — including where a unified data layer and AI-powered decision intelligence fit in

Who this is for

Contact Centre Directors, Heads of Customer Experience, Operations Managers, and CIOs who want a clear, structured view of how well their current reporting environment supports fast, confident decision-making, not just historical reporting.



2. Why the Questions Have Changed (Not Just the Tools)

Ten years ago, the core questions a contact centre needed answered were largely descriptive: What's our service level? What's our average handle time? Are we hitting adherence targets? Dashboards were built, very effectively, to answer exactly these questions.

Today, leaders are being asked diagnostic and predictive questions layered on top of the descriptive ones:

- Why did abandonment increase this week, and in which queue?
- Which teams are consistently underperforming, and why?
- What is actually driving our NPS decline?
- Which customers are most at risk of churning, and what should we do about it?

These aren't unreasonable questions, **they reflect how much more contact centres are now expected to deliver**. But they do require a different kind of capability: unified data across every source, natural language access to that data, and analysis that goes beyond a static view.

This is the evolution the Dashboard Health Assessment is built to help you navigate. It isn't a verdict on any specific dashboard or platform, it's a structured look at whether your current reporting environment has kept pace with the questions your business is actually asking.



3. The Dashboard Health Assessment

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree) based on your contact centre's current reporting environment.

Be honest rather than aspirational, the value of this assessment comes from an accurate baseline.

Scale: 1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree

Category A, Data Unification

How connected is the data behind your dashboards?

Question	Your Score (1–5)
All of our key systems (telephony, WFM, CRM, CX/survey tools) feed into one unified reporting environment.	-----
We rarely need to manually cross-reference two or more reports to get a complete picture.	-----
Our data is refreshed in near real time, not batch-updated overnight or weekly.	-----
New data sources can be added to our reporting environment without significant engineering effort.	-----



Category B, Speed to Insight

How quickly can your team go from question to answer?

Question	Your Score (1–5)
When a KPI moves unexpectedly, we can identify the likely cause within the hour.	-----
Frontline leaders can self-serve answers to operational questions without waiting on an analyst.	-----
We can answer ad-hoc executive questions (e.g. "why did NPS drop?") within the same meeting they're asked.	-----
Investigating a single anomaly typically takes minutes, not hours.	-----

Category C, Root Cause Capability

Can your reporting explain why, not just what?

Question	Your Score (1–5)
Our dashboards surface likely causes of a metric change, not just the change itself.	-----
We can drill from a top-line KPI down to the specific queue, agent, or interaction driving it.	-----
Anomalies and outliers are flagged to us proactively, rather than us having to notice them.	-----
We rarely rely on "gut feel" to explain why a KPI moved.	-----



Category D, Actionability

Does your reporting tell you what to do next?

Question	Your Score (1–5)
Our reporting environment recommends next steps or actions, not just data.	-----
Coaching priorities are identified from data rather than manager instinct alone.	-----
At-risk customers are flagged before churn occurs, not discovered afterward.	-----
Insights from reporting are consistently acted on within days, not weeks.	-----

Category E, Forward-Looking Visibility

Is your reporting predictive as well as historical?

Question	Your Score (1–5)
We can forecast staffing and volume needs from within our existing reporting environment.	-----
We identify emerging trends before they show up as a problem in a monthly report.	-----
Our leadership team spends more time planning ahead than explaining what already happened.	-----
We are confident our reporting environment will scale with next year's data volume and complexity.	-----



4. Scoring & What Your Results Mean

Add up your scores across all 20 statements. Maximum possible score: 100.

Score	Stage	What this typically means
20–40	Foundational	Reporting is largely descriptive and manual. Data likely lives in several disconnected systems, and answering "why" questions takes hours or days of cross-referencing.
41–60	Developing	Core reporting is solid, but root cause analysis and forward-looking visibility are still manual or inconsistent. Good foundation to build on.
61–80	Advancing	Most day-to-day questions are answered quickly. The gap is in proactive detection and recommended actions, the step from insight to action still relies on people.
81–100	Optimised	Your reporting environment supports fast, confident, forward-looking decisions. Focus shifts to scaling this capability and extending it across more of the business.

Wherever you land, **this is a starting point** rather than a scorecard to be judged against, every contact centre's reporting needs evolve as the business grows and the questions leaders are asked become more sophisticated. **The categories where you scored lowest point to exactly where to focus next, which is covered in Section 6.**



5. The Contact Centre Dashboard Health Checklist

Use this quick-reference checklist with your team as a 15-minute pulse check between full assessments. Tick each box that reflects your current reality.

Data Foundations

- ☐ Every key system (telephony, WFM, CRM, CX/survey) feeds a single unified reporting layer.
- ☐ Data refreshes in near real time.
- ☐ Adding a new data source doesn't require a lengthy IT project.

Speed & Access

- ☐ Frontline leaders can self-serve answers without analyst support.
- ☐ Ad-hoc questions can be answered within the same meeting they're raised.
- ☐ No one on the team is regularly exporting to spreadsheets to cross-reference reports.

Root Cause & Action

- ☐ Anomalies are flagged to us proactively, rather than us noticing them by chance.
- ☐ We can trace a top-line metric down to the specific queue, agent, or interaction driving it.
- ☐ Coaching priorities are identified from data, not manager instinct alone.
- ☐ At-risk customers are surfaced before churn occurs.

Forward Planning

- ☐ Staffing and volume forecasts come from within our existing reporting environment.
- ☐ We spend more time planning ahead than explaining what already happened.
- ☐ Leadership is confident this environment will scale with next year's data volumes.

How to use this checklist

- Fewer than 10 boxes ticked: prioritise the Dashboard Health Assessment conversation with your team this quarter.
- 10–13 ticked: you have strong foundations, focus on the specific gaps below.
- 14+ ticked: you're well positioned to extend decision intelligence further across the business.



6. Closing the Gap: Your Next Steps

Closing the gaps you've just identified doesn't require replacing your reporting environment or starting from scratch. In our experience working with contact centres across every maturity stage, it comes down to five things layered on top of what you already have, three foundational practices any team can start this week, and two capabilities that take a unified data and AI layer to deliver at scale.

6.1 Establish a Common Language Across Every System

One of the most common, and most overlooked, sources of dashboard distrust isn't a missing feature. It's inconsistent definitions. If telephony reports "Average Handle Time" one way, your WFM platform calculates it slightly differently, and a spreadsheet built by an analyst six months ago uses a third definition again, then no two people in the room are ever looking at the same number. The result is meetings spent debating whose figure is right instead of deciding what to do about it.

A shared data language is a prerequisite for everything else in this section. It costs nothing to start and pays off immediately.

- Agree a single definition for every core KPI, service level, AHT, occupancy, adherence, NPS, CSAT, and document it once, centrally.
- Apply that definition consistently across every system and every team, not just the primary dashboard.
- Assign an owner for the KPI glossary, and revisit it whenever a new data source, system, or team is added.
- Retire any local or team-specific version of a metric that doesn't match the agreed definition.

Quick test

Ask three people in three different teams to define "Average Handle Time" without looking anything up. If you get three different answers, this is your starting point.



6.2 Map Who Needs to Know What, and When

A single dashboard trying to serve every audience usually ends up serving none of them well. A Contact Centre Director doesn't need the same view, at the same frequency, as a Workforce Planning Manager, and forcing everyone onto one screen is often what makes reporting feel overwhelming rather than useful.

The fix isn't more dashboards for their own sake, it's a small number of purpose-built views, each mapped to a specific persona's decisions and cadence. Use the map below as a starting model, then adjust it to reflect your own org chart.

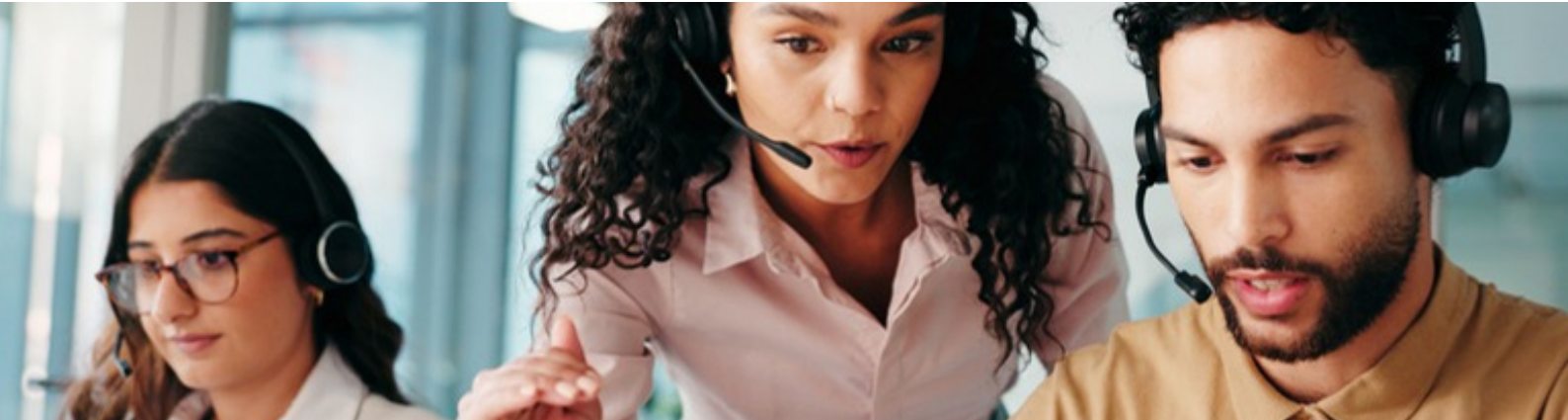
Role	Decision Cadence	Core Questions They Need Answered	Best View Type
Contact Centre Director	Weekly / Monthly	Are we improving quarter over quarter? Where's the competitive or revenue risk? What needs board-level attention?	Executive summary, trends and exceptions, not raw data
Head of CX / Operations	Daily	Which teams or queues need attention today? What's changed since yesterday? Where should coaching focus this week?	Operational view, live performance and alerts
CIO / Head of Data	Ongoing / as needed	Is data flowing correctly from every source? Where are the integration or quality gaps? Can this scale?	Technical / integration health view
Workforce Planning Manager	Daily / Weekly	What's the forecast for next week? Are we correctly staffed for expected volume and skill mix?	Planning view, forecasts and scheduling impact



Worksheet, Your Persona Map

Use the blank rows below to map the actual roles in your organisation. This is one of the most valuable inputs you can bring into a working session with our team, it turns a general assessment into a specific build plan.

Role	Decision They Need to Make	How Often	Current Source of Truth	Biggest Gap



6.3 Choose Meaningful KPIs, Not Vanity Metrics

Persona-based views only work if what's on them matters. It's common for dashboards to accumulate metrics over time simply because they're easy to capture, not because anyone uses them to make a decision.

A meaningful KPI meets four simple criteria:

- It's tied to a specific decision, someone changes what they do based on this number moving.
- It has a clear owner, one person or team is accountable for responding to it.
- It has a threshold that triggers action, everyone agrees at what point it needs attention, not just when it looks interesting.
- It's reviewed on a cadence that matches the decision it informs, daily metrics reviewed daily, strategic metrics reviewed monthly or quarterly.

The one-question test

For every metric on a dashboard, ask: "What decision changes if this number moves?" If no one in the room can answer that question, the metric doesn't belong on that view, even if it's interesting, and even if it's easy to report.

Worksheet, Stress-Test Your Current KPIs

Pick five KPIs currently on your primary dashboard and run them through the test below.

KPI	What decision changes if it moves?	Who owns the response?	Threshold that triggers action



6.4 Unify the Data Behind Every View

A **common language** and **persona-based** views both depend on the same foundation: a single, real-time source of truth behind every system. Without unification, teams inevitably drift back to disconnected spreadsheets and conflicting numbers, no matter how well the views themselves are designed. A unified data layer, pulling from telephony, WFM, CRM, and CX platforms into one place, is what makes the previous two steps sustainable rather than a one-off exercise.

6.5 Add Natural Language Access and Root Cause

Once your data is unified, your language is consistent, and your views are mapped to the right people, the final gap is usually speed: not everyone can write a query or build a report, and root cause investigation still takes hours of manual digging. Natural language access closes this gap, any leader can ask "why did NPS fall last month?" in plain English and get root cause and a recommended next step in seconds, not hours.

Where emite and AskEmite fit

This is precisely the capability emite has built. emite's Advanced iPaaS unifies data from any source into one version of the truth, the foundation for a shared language and persona-based views.

AskEmite, emite's AI-powered decision intelligence layer, lets every persona ask questions in plain English and get root cause analysis and recommended actions in seconds. Together, they're the natural next step for any contact centre working through Sections 6.1–6.5.



6.6 Turn Your Results Into a Plan

You now have four things in hand: your Dashboard Health Assessment score, your checklist results, a first draft of your persona map, and a stress-tested view of your current KPIs. On their own, they give you a clear internal picture. Brought into a working session with our team, they become a practical, prioritised build plan, with no cost and no obligation.

In a Dashboard Health Assessment session, our team will:

- Walk through your assessment score and checklist results category by category.
- Review your persona map and help refine the views each role actually needs.
- Pressure-test your current KPIs against the one-question test.
- Map the fastest path to a unified, persona-based, natural-language reporting environment for your contact centre, including where AskEmite fits.

Book a workshop session

Bring your completed assessment, checklist, and worksheets to a session with our team at or speak with your emite account team to get started.

We'll turn your results into a practical, prioritised plan for your contact centre.



7. About emite and AskEmite

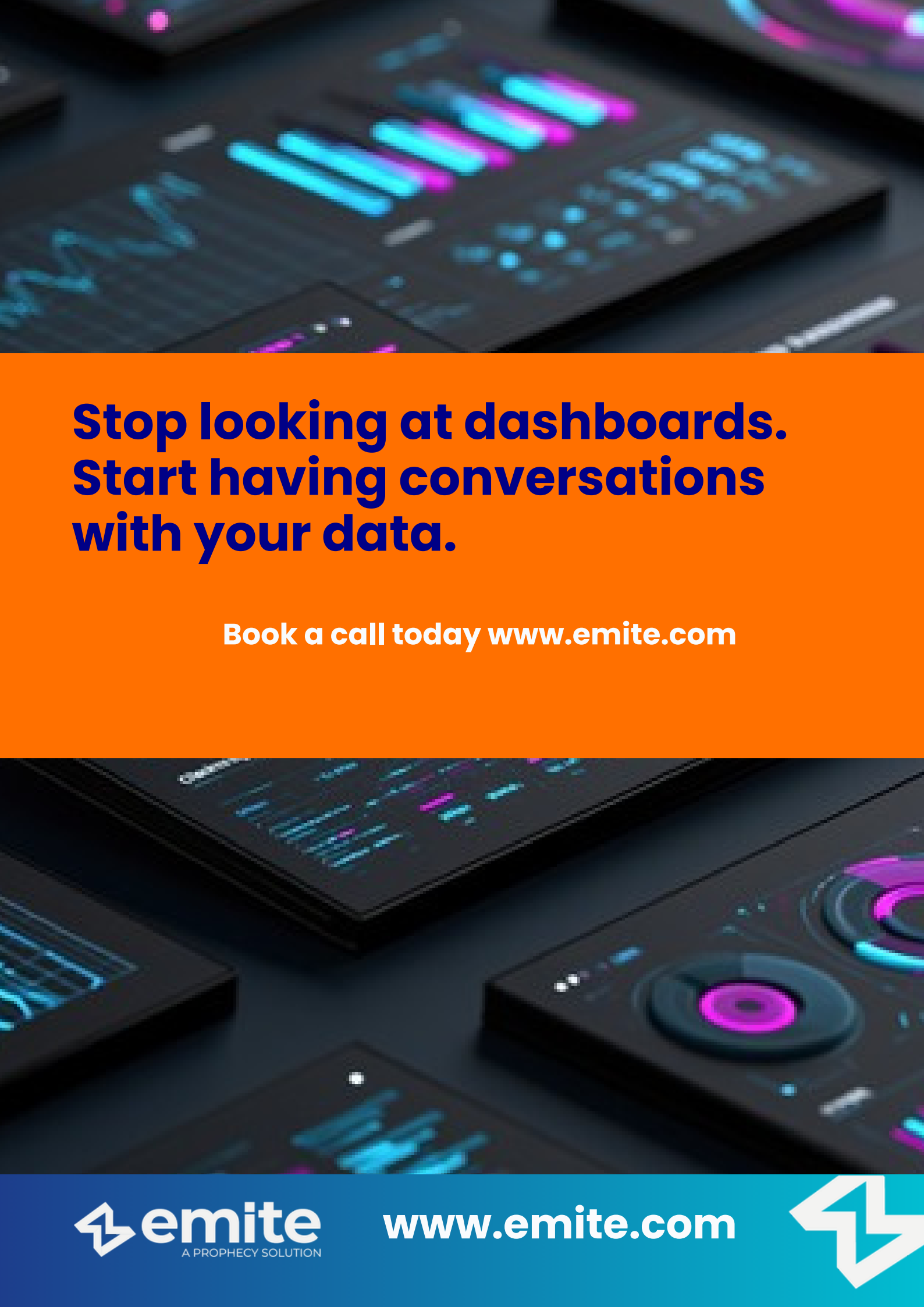
emite is a contact centre analytics and intelligence platform trusted by leading Australian and global contact centres. emite unifies data from any source, CRM, WFM, telephony, and CX platforms, into one version of the truth, giving leaders real-time and predictive analytics without the complexity of managing multiple disconnected systems.

AskEmite is emite's AI-powered decision intelligence layer. Not another chatbot, and not another dashboard, AskEmite is built to answer the questions dashboards have never been able to answer on their own: why a metric changed, which teams need coaching, and which customers are at risk, in seconds, in plain English.

Proof Points

- Real-time unified data from any source, CRM, WFM, telephony, CX platforms
- Natural language querying, no SQL, no analyst required
- Anomaly detection that surfaces issues before they escalate
- Root cause analysis delivered in seconds, not hours
- Pre-built contact centre KPI libraries out of the box
- Trusted by leading Australian and global contact centres





**Stop looking at dashboards.
Start having conversations
with your data.**

Book a call today www.emite.com

