# Case Study

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# Executive Summary:

The Active Dashboard and Separation Dashboard are essential tools meticulously designed to address critical workforce management challenges within our organization, utilizing sample HR data to demonstrate their capabilities. These dashboards empower data-driven decision-making, contributing to the reduction of turnover and the enhancement of employee satisfaction.

## Active Dashboard:

The Active Dashboard primarily focuses on tracking and analyzing the current state of our workforce using key performance indicators (KPIs) and detailed visualizations. The KPIs, including Total Active Employees, Year-over-Year Variation, Average Employee Age, Average Tenure in Months, and the Percentage of Bad Hires among Active Employees, offer a snapshot of workforce size, trends, age distribution, tenure, and hire quality. The dashboard provides users with slicers for filtering data by year, gender, employment type (full-time or part-time), region, and ethnicity. Visualizations encompass Total Active Employee trends, Actives by Ethnicity Group, Average Tenure in Months, Actives by Region, Separation trends, and Termination Reason breakdown. These components provide invaluable insights into our workforce's dynamics.

## Separation Dashboard:

The Separation Dashboard is dedicated to monitoring and analyzing employee separations, providing insights into the causes and trends behind workforce departures. It includes KPIs such as Total Separations, Separation Rate, Year-over-Year Change in Separations, and the Percentage of Separations by Reason, offering a comprehensive overview of separations and their impact. Users can filter data using slicers that include year, gender, employment type, region, and ethnicity. Visualizations in the dashboard illustrate Total Separations, Separation Rate, Year-over-Year Changes, and the Percentage of Separations by Reason, essential for addressing turnover challenges and enhancing employee satisfaction.

Both dashboards play a pivotal role in our organization's HR strategy. The Active Dashboard assists in managing our current workforce effectively, while the Separation Dashboard allows us to delve into separation data for informed decision-making. By reducing turnover and improving employee satisfaction, we aim to create a more stable and engaged workforce. These dashboards align our HR efforts with the organization's objectives and drive us toward a more productive and satisfied workforce, using the provided sample HR data as a foundation.

# Introduction:

In today's dynamic business environment, managing a workforce efficiently is of paramount importance for any organization. To make informed decisions and create an engaged and satisfied workforce, it is crucial to have access to insightful data and analytics. The Active Dashboard and Separation Dashboard serve as powerful tools for achieving these objectives by providing a comprehensive view of our organization's employee data and the dynamics of workforce management.

## Active Dashboard Introduction:

The Active Dashboard is a dedicated solution designed to empower organizations with a real-time view of their current workforce. Through a combination of key performance indicators (KPIs) and detailed visualizations, this dashboard offers a holistic understanding of the employee landscape. With KPIs like Total Active Employees, Year-over-Year Variation, Average Employee Age, Average Tenure in Months, and the Percentage of Bad Hires among Active Employees, organizations can quickly grasp essential metrics. In addition, the dashboard provides various slicers, such as year, gender, employment type (full-time or part-time), region, and ethnicity, allowing users to filter and analyze data based on specific dimensions. Visualizations include Total Active Employee trends, Actives by Ethnicity Group, Average Tenure in Months, Actives by Region, Separation trends, and Termination Reason breakdown, offering invaluable insights into workforce dynamics.
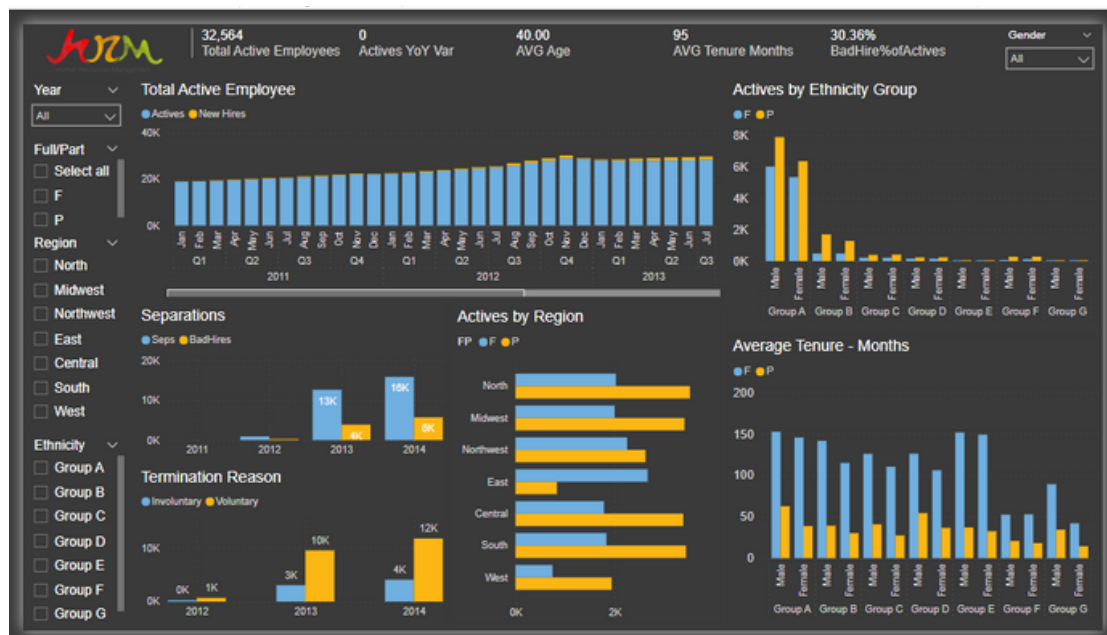
## Separation Dashboard Introduction:

The Separation Dashboard is a specialized tool designed to monitor and analyze employee separations, providing organizations with deep insights into the reasons behind workforce departures. By understanding the drivers of separations, organizations can take proactive steps to improve retention strategies and overall workforce management. The dashboard includes KPIs such as Total Separations, Separation Rate, Year-over-Year Change in Separations, and the Percentage of Separations by Reason, giving organizations a comprehensive overview of separation trends and their impact. Slicers in the dashboard, including year, gender, employment type, region, and ethnicity, offer users the flexibility to filter and explore data. Visualizations represent Total Separations, Separation Rate, Year-over-Year Changes, and the Percentage of Separations by Reason, empowering organizations to address turnover challenges and enhance employee satisfaction.

These dashboards are tailored to meet the specific needs of organizations, providing a holistic view of the workforce and enhancing data-driven decision-making. By leveraging the capabilities of the Active and Separation Dashboards, organizations can effectively manage their employees and work towards a more stable and engaged workforce. This case study showcases the application of these dashboards using sample HR data, highlighting their potential for organizations seeking to optimize workforce management.

# Active Dashboard Section:

**Active Dashboard Visualizations**



Introduction:

The Active Dashboard has been designed to monitor essential key performance indicators (KPIs) and gain insights into our organization's workforce. Through a structured analysis using the "5 Whys" method, we have identified the core objectives and components of the dashboard to enhance our decision-making processes.

Step 1: Define the Problem or Purpose

We are creating the Active Dashboard to monitor key performance indicators (KPIs) and gain insights into our workforce. This initial purpose stems from our need to better understand our organization's employee data.

Step 2: Ask "Why" Again

Why do we want to monitor KPIs and gain insights into our workforce? Our goal is to make data-driven decisions and improve our employee management strategies. This deeper objective emphasizes the significance of data in enhancing our approach to managing our workforce effectively.

Step 3: Repeat the Process

Why do we want to make data-driven decisions and improve employee management? Our ultimate aim is to reduce turnover and enhance employee satisfaction. This higher-level goal signifies that our dashboard is a vital tool in achieving these outcomes.

Step 4: Summarize the Findings

In summary, the Active Dashboard is created to monitor key performance indicators, make data-driven decisions, and, most importantly, reduce turnover and improve employee satisfaction. It serves as a central tool for achieving these critical objectives within our organization.

Step 5: Document the Dashboard's Key Components

To fulfill our purpose, the Active Dashboard includes essential components such as KPIs like Total Active Employees, Year-over-Year Changes, and Employee Demographics. Additionally, it features various visualizations such as line charts, pie charts, and bar charts, which help us track workforce trends and make informed decisions aligned with our primary objectives.

Detailed Dashboard Components:

KPIs:

- Total Active Employees: This KPI shows the total number of active employees in the organization. It provides an overview of the current workforce size.

- Actives YoY Var: This KPI measures the year-over-year variation in the number of active employees, helping to identify trends and changes.

- AVG Age: Average Age represents the mean age of active employees. It gives insight into the age distribution within the workforce.

- AVG Tenure Months: Average Tenure Months is the average duration of employment among active employees. It helps in understanding how long employees tend to stay in the organization.

- BadHire%Actives: This KPI calculates the percentage of bad hires among active employees, indicating the quality of new hires in the organization.

| 32,564 | 0 | 40.00 | 95 | 30.36% |
| Total Active Employees | Actives YoY Var | AVG Age | AVG Tenure Months | BadHire%ofActives |

Slicers:

- Year: A dropdown list allowing users to filter data by selecting a specific year.

- Gender: A dropdown list to filter data by selecting a gender category (e.g., male or female).

- Full/Part: A vertical list that filters between full-time and part-time employees.

- Region: A vertical list enabling users to select specific regions for data analysis.

Ethnicity: A vertical list to filter data by different ethnic groups.

| Gender | Region | Ethnicity |
|---|---|---|
| All | ☐ North | ☐ Group A |
| | ☐ Midwest | ☐ Group B |
| Year | ☐ Northwest | ☐ Group C |
| All | ☐ East | ☐ Group D |
| | ☐ Central | ☐ Group E |
| Full/Part | ☐ South | ☐ Group F |
| ☐ Select all | ☐ West | ☐ Group G |
| ☐ F | | |
| ☐ P | | |

Graphs:

- Total Active Employee: This line chart displays the total number of active employees over time. It provides insights into workforce trends, including new hires and active employees.

- Actives By Ethnicity Group: A line chart showing the distribution of active employees by ethnicity and gender. It also considers full-time and part-time (FP) categories.

- Average Tenure - Months: A line chart representing the average tenure of employees in months, broken down by ethnicity, gender, and FP status.

- Actives By Region: This clustered bar chart illustrates the distribution of active employees by region, considering FP status.

- Separation: A line chart displaying the number of separations and bad hires over time, helping to monitor employee turnover and quality of hires.

- Termination Reason: A clustered column chart that breaks down the reasons for termination, providing insights into why employees leave the organization.

Each of these components plays a vital role in providing insights into the workforce, tracking key metrics, and allowing users to filter and analyze data based on various dimensions. These visualizations and KPIs empower decision-makers to make informed choices and address HR-related challenges effectively.

# Separation Dashboard

**Separation Dashboard Visualizations**



Introduction:

The Separation Dashboard is a valuable tool that helps the organization understand various aspects of employee separations, including the total number of people who left, their age when they left, monthly turnover rates, full-time and part-time separations, and the number of people who left region-wise.

Step 1: Define the Problem or Purpose

The primary purpose of the Separation Dashboard is to monitor and analyze employee separations. It is crucial to understand the dynamics of workforce departures within our organization.

Step 2: Ask "Why" Again

Why do we want to monitor and analyze employee separations? We aim to gain insights into the causes and trends behind separations to improve our retention strategies and overall workforce management.

Step 3: Repeat the Process

Why do we want to improve retention strategies and workforce management? The ultimate goal is to reduce turnover and enhance employee satisfaction, leading to a more stable and engaged workforce.

Step 4: Summarize the Findings

In summary, the Separation Dashboard is developed to monitor and analyze employee separations, gain insights into the reasons behind these separations, and, most importantly, reduce turnover and improve employee satisfaction. It serves as a central tool to achieve these critical objectives within our organization.

Step 5: Document the Dashboard's Key Components

To fulfill our purpose, the Separation Dashboard includes essential components such as KPIs like Total Separation, Sepa Year-over-Year, Avg Tenure Month. Additionally, it features various visualizations such as clustered column charts, Line and Stacked column charts, and bar charts, which help us track workforce trends and make informed decisions aligned with our primary objectives.

Detailed Dashboard Components

KPIs:

- Total Separation: This metric provides the total number of employees who have left the organization within the selected timeframe. It serves as a key indicator of overall workforce separation.

- Seps YOY Var (Year-over-Year Variation): This KPI shows the year-over-year variation in the number of people who left. It allows us to assess trends and fluctuations in separation rates across different years.

- Avg Age of Separation: This metric calculates the average age of employees at the time of their departure. It provides insights into the age demographics of separating employees.

- Avg Tenure Months: The average tenure, measured in months, indicates the average length of time employees have spent with the organization before separation. This is a crucial metric for understanding employee retention.

- Sep% of Active: This KPI calculates the percentage of employees who have left relative to the total number of active employees. It offers a clear picture of the separation rate in relation to the current workforce.



| 2,812 | 840 | 39.00 | 84 | 53.43% |
| Total Separation | Seps YoY Var | AVG Age | AVG Tenure Months | Sep%ofActive |

Slicers:

- Year: A dropdown list allowing users to filter data by selecting a specific year.

- Gender: A dropdown list to filter data by selecting a gender category (e.g., male or female).

- Full/Part: A vertical list that filters between full-time and part-time employees.

- Region: A vertical list enabling users to select specific regions for data analysis.

- Ethnicity: A vertical list to filter data by different ethnic groups.



Graphs:

- Total Separation Employees: This line and stacked column chart tracks monthly separations, providing insights into the reasons behind departures.

- Separation By Ethnicity Group: This Clustered column chart shows the distribution of employees by ethnicity and gender who left the company. It also considers full-time and part-time(FP) categories.

- Average Tenure - Months: This line and stacked column chart show the Average Tenure by ethnicity and Gender. It also considers full-time and part-time(FP) categories.

- Separation By Region: This Clustered column chart illustrates the distribution of employees who left the company voluntarily and involuntarily. Here we have selected the South region.

- Separation: A Clustered column chart displaying the number of separations and bad hires over time, helping to monitor employee turnover and quality of hires. But here we have filtered it by the year 2014.

- Termination Reason: A Clustered column chart that breaks down the reasons for termination, providing insights into why employees leave the organization. Here we have filtered it by the year 2014.

The workforce insights, key metrics tracking, and data filtering and analysis based on several dimensions are all made possible by these essential components. The HR-related problems may be successfully addressed by decision-makers with the help of these KPIs and visualizations.

**Conclusion :**

In summary, both the Active Dashboard and the Separation Dashboard stand as indispensable assets for our organization's workforce management strategy. Each dashboard serves a distinct yet vital purpose, working in tandem to ensure the success of our workforce and the satisfaction of our employees.

The Active Dashboard empowers us to monitor essential Key Performance Indicators (KPIs), make data-driven decisions, and work towards reducing turnover while enhancing employee satisfaction. It provides valuable insights into the current state of our workforce, enabling us to optimize our workforce management and improve the overall experience of our employees.

On the other hand, the Separation Dashboard plays a critical role in monitoring employee separations and comprehending the reasons behind these departures. Through a clear understanding of its objectives and key components, we are better positioned to utilize this tool effectively. It equips us to make data-driven decisions and develop strategies to reduce turnover, enhance retention, and cultivate a more stable and satisfied workforce. Employee turnover, a critical metric, is addressed proactively through the insights provided by this dashboard.

By leveraging the capabilities of both dashboards, we take a holistic approach to workforce management, covering both active employees and those who have separated. This approach aligns with our overarching goal of achieving organizational success while ensuring the well-being and satisfaction of our valuable employees. In doing so, we are better equipped to meet the challenges of a dynamic business environment and promote a more engaged and productive workforce.