



Portfolio Census Reporting

Private Equity Firm

Built a census dashboard in Power BI to track employee metrics across the portfolio for a PE firm

Private equity firm company needs portfolio census reporting

Picture this...

You're looking for standardize and automate the portfolio companies' census data and set up a reporting suite in Power BI to provide visibility into the census performance on real-time basis.

You turn to Accordion.

We partner with your team to Built a census dashboard in Power BI to track employee metrics across the portfolio for a PE firm, including:

- 1) Standardizing the census data across portfolio companies leveraging the automated workflows in Alteryx as different PortCos had different nomenclatures for various metrics.
- 2) Defining the use cases in collaboration with the client and finalized the required KPIs focused on attrition, growth, diversity, etc.
- 3) Building an interactive dashboard in Power BI to provide visibility into key performance metrics such as headcount growth, diversity and retention metrics with role-based access to PE firm management and portfolio companies.
- 4) Developing and implementing a custom logic to anonymize the company's data dynamically for the view of each portfolio company.

Your value is enhanced.

You have the self-serve BI census dashboard helped the client to rank the portfolio companies within the overall ecosystem or within the funds based on various dimensions. You also have dashboard which provided real-time visibility to the PE firm on the key talent metrics of the PortCos allowing for preemptive measures.

KEY RESULT

- Impact 1...
- Impact 2...

VALUE LEVERS PULLED

- Lever 1
- Lever 2
- Lever 3

Census Data Management & BI Reporting for a Private Equity Firm

Situation

- Client lacked visibility into the census performance of its portfolio companies due to unstructured data and lack of a single source of reporting
- Collaborated with the client's talent team to standardize and automate the portfolio companies' census data and set up a reporting suite in Power BI to provide visibility into the census performance on real-time basis

Accordion Value Add

- Standardized the census data across portfolio companies leveraging the automated workflows in Alteryx as different PortCos had different nomenclatures for various metrics
- Defined the use cases in collaboration with the client and finalized the required KPIs focused on attrition, growth, diversity, etc.
- Built an interactive dashboard in Power BI to provide visibility into key performance metrics such as headcount growth, diversity and retention metrics with role-based access to PE firm management and portfolio companies
- Developed and implemented a custom logic to anonymize the company's data dynamically for the view of each portfolio company

Impact

- The self-serve BI census dashboard helped the client to rank the portfolio companies within the overall ecosystem or within the funds based on various dimensions
- Dashboard also provided real-time visibility to the PE firm on the key talent metrics of the PortCos allowing for preemptive measures

Methodology/ Approach

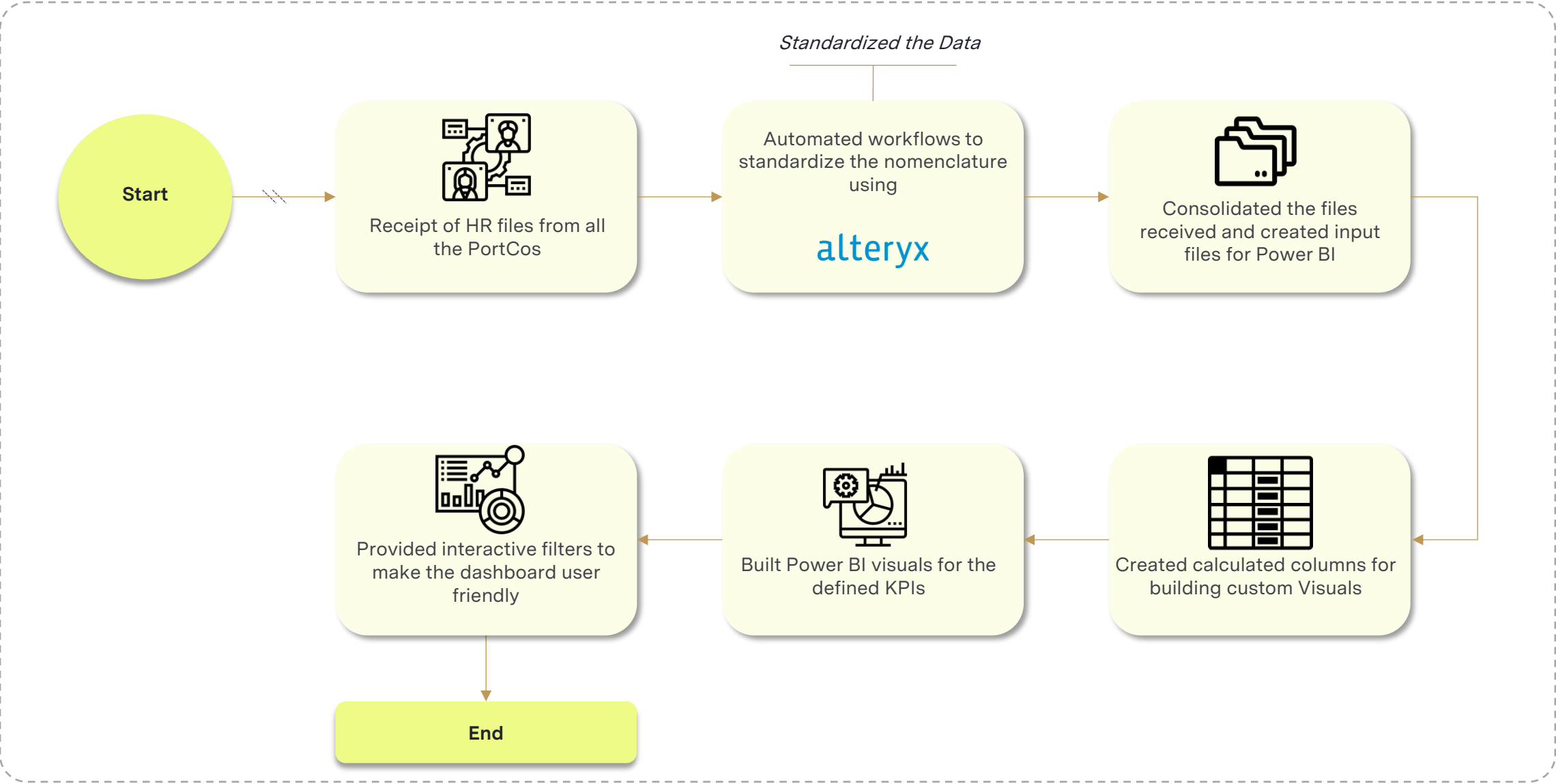
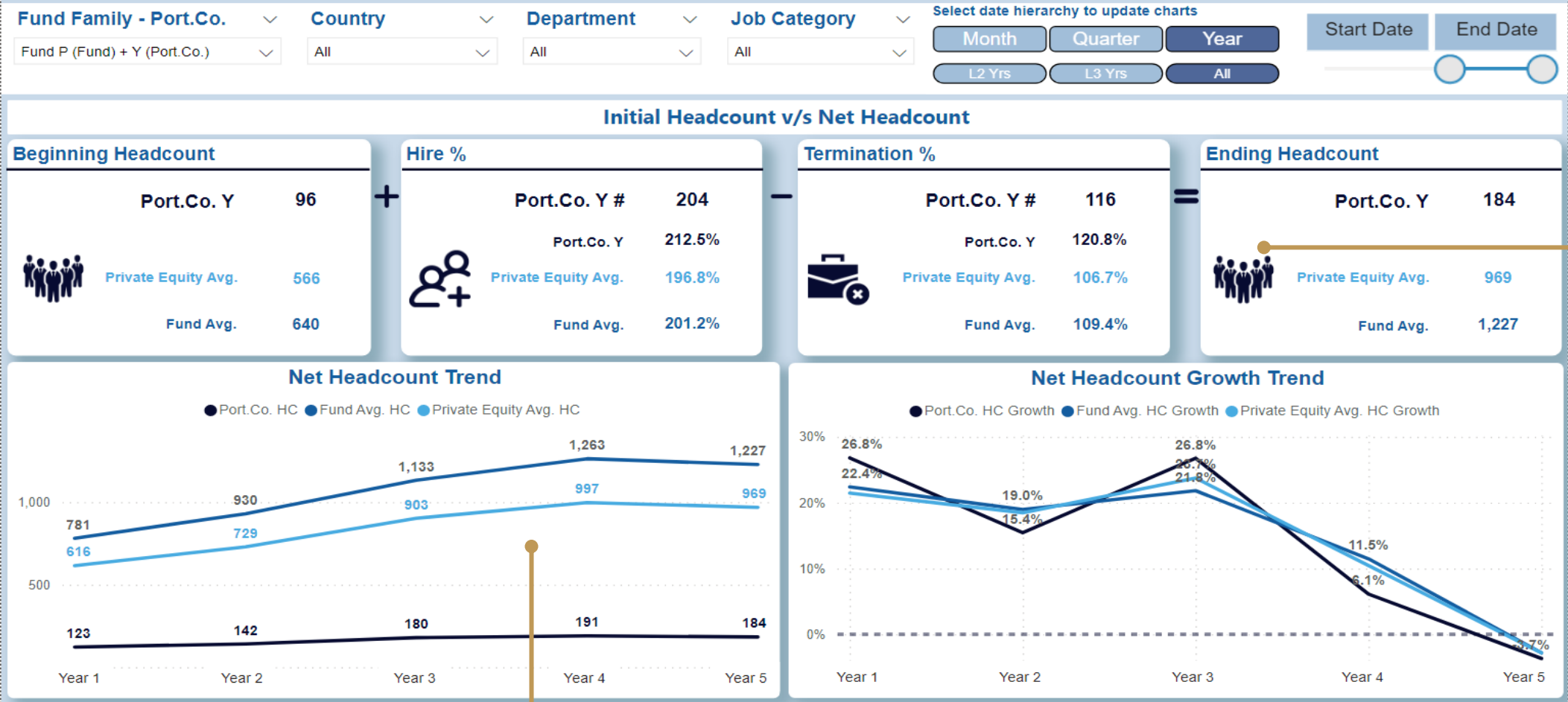


Exhibit #1 – Headcount Trends of Portco vs. Firm Level and Fund Level Averages

ILLUSTRATIVE



Different granularity / snapshot of data at a PortCo and fund level

PortCo headcount vs. overall private equity and fund level averages

Exhibit #2 – Voluntary and Involuntary Attrition Distribution across years

ILLUSTRATIVE

