



GLOBAL FINANCE AND BUSINESS MANAGEMENT

PERSONNEL ANALYSIS



Overview

A data set of personnel projects has been given to analyze. The dataset contains various types of projects done by JP Morgan's personnel. It includes the cost/hr of each personnel, the types of projects done by each personnel, their budget to actual hours and their budget to actual costs.

From the data, 5 important insights are to be analyzed. These insights are :

- Projects above and below budget costs
- Projects above and below budget hours
- Personnel above and below budget costs
- Personnel above and below budget hours
- Personnel that cost the most

Personnel Project Data Set

[illegible]



Added Variables

After doing data exploration and data cleaning on the dataset given, four more variables were added to the data. They are “**Total Budget Hours**”, “**Total Actual Hours**”, “**Total Budget Cost**” and “**Total Actual Cost**”. They were added to know the total budget hours and total budget costs for each projects done by the personnel.

Dataset with four added variables

[illegible]



Pivot Table Analysis

Used pivot tables to analyze and summarize the data to gain our insights

Projects by Cost

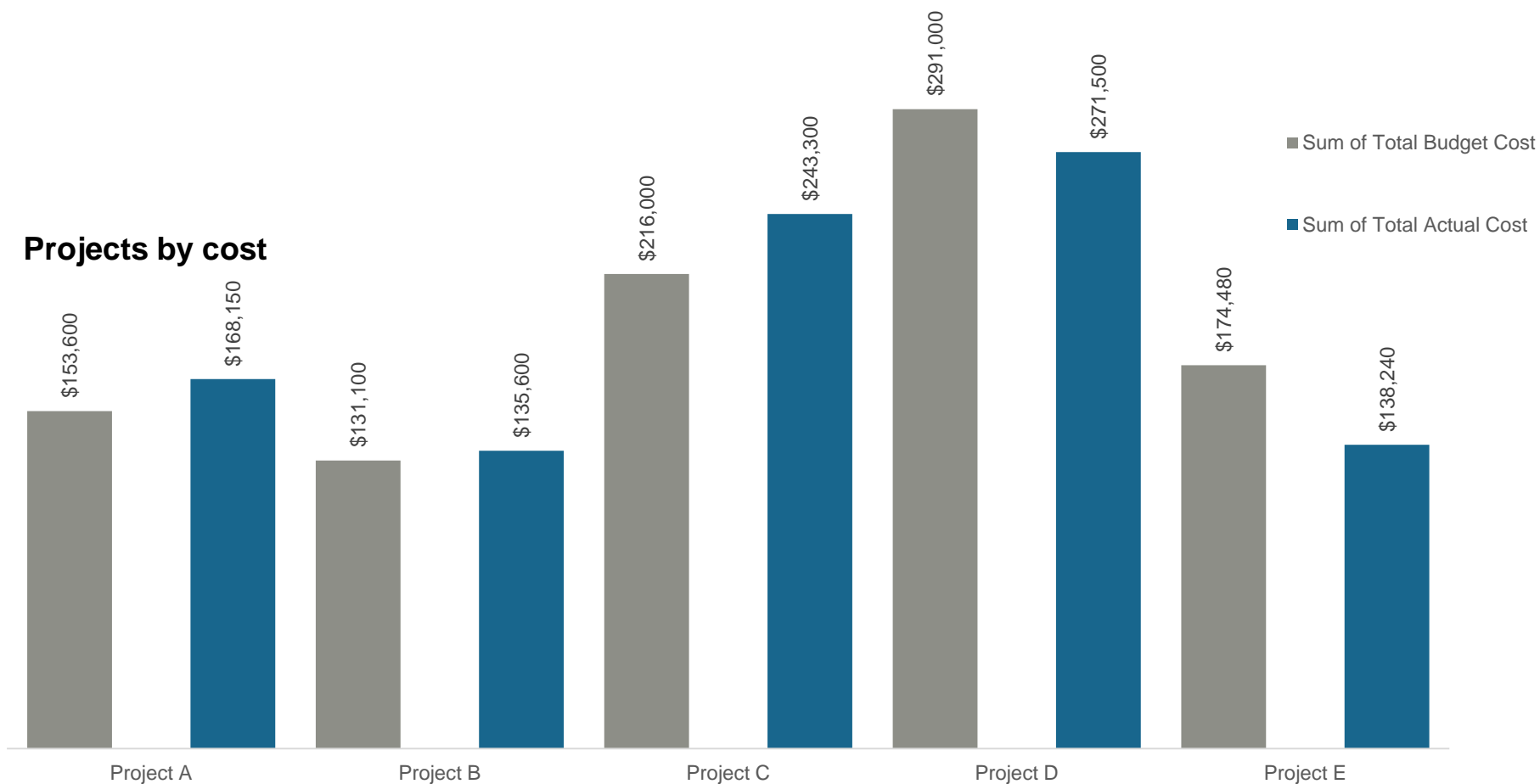
The first insight gotten is project by cost. The sum total of budget costs and actual costs were gotten using pivot table as shown below:

Row Labels	Sum of Total Budget Cost	Sum of Total Actual Cost	Variance	
Project A	\$153,600	\$168,150	-\$14,550	
Project B	\$131,100	\$135,600	-\$4,500	
Project C	\$216,000	\$243,300	-\$27,300	
Project D	\$291,000	\$271,500	\$19,500	
Project E	\$174,480	\$138,240	\$36,240	
Grand Total	\$966,180	\$956,790		

Projects by Cost

Projects by Cost

- Project A, B and C are above budget cost with \$14550, \$4500 and \$27300 respectively.
- Project D and E are under budget cost with \$19500 and \$13240 respectively.



Projects by Hours

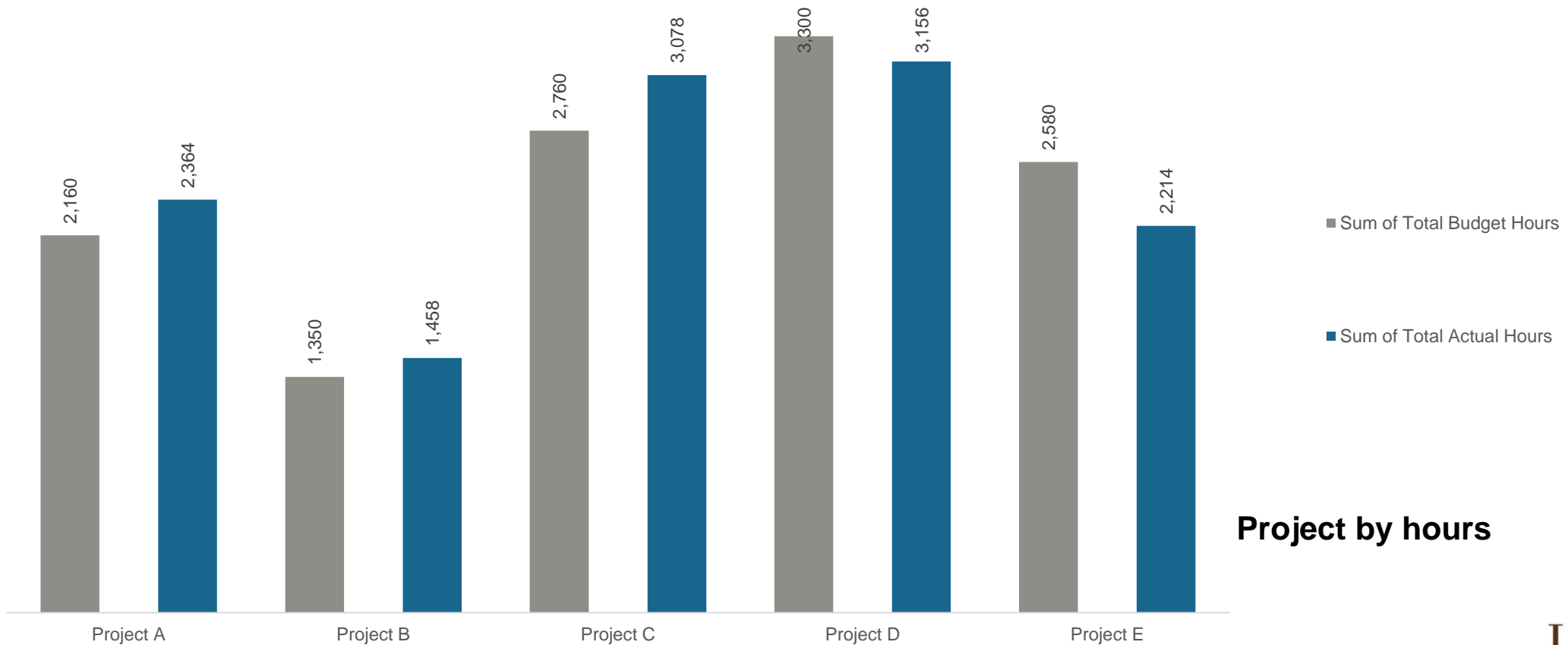
The second insight gotten is project by hours. The sum total of budget hours and actual hours were gotten using pivot table as shown below:

Row Labels	Sum of Total Budget Hours	Sum of Total Actual Hours	Variance	
Project A	2,160	2,364	-204	
Project B	1,350	1,458	-108	
Project C	2,760	3,078	-318	
Project D	3,300	3,156	144	
Project E	2,580	2,214	366	
Grand Total	12,150	12,270		

Projects by Hours

Project by Hours

- Project A, B and C are above budget hours with 204, 108 and 318 respectively
- Project C and D are below budget hours with 144 and 366.



Project by hours

Personnel by Cost

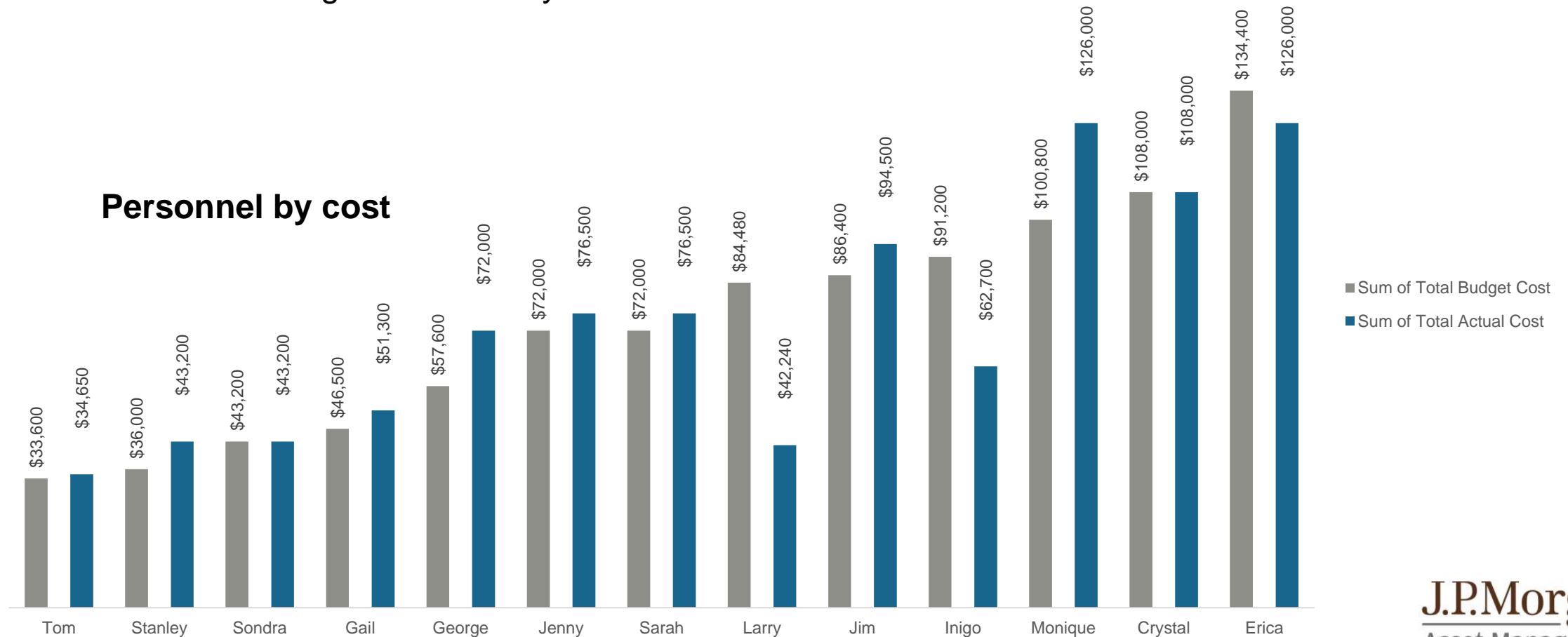
The third insight gotten is personnel by cost. The sum total of personnel budget and actual costs were gotten using pivot table as shown below:

Row Labels	Sum of Total Budget Cost	Sum of Total Actual Cost	Variance	
Tom	\$33,600	\$34,650	-\$1,050	
Stanley	\$36,000	\$43,200	-\$7,200	
Sondra	\$43,200	\$43,200	\$0	
Gail	\$46,500	\$51,300	-\$4,800	
George	\$57,600	\$72,000	-\$14,400	
Jenny	\$72,000	\$76,500	-\$4,500	
Sarah	\$72,000	\$76,500	-\$4,500	
Larry	\$84,480	\$42,240	-\$42,240	
Jim	\$86,400	\$94,500	-\$8,100	
Inigo	\$91,200	\$62,700	\$28,500	
Monique	\$100,800	\$126,000	-\$25,200	
Crystal	\$108,000	\$108,000	\$0	
Erica	\$134,400	\$126,000	\$8,400	
Grand Total	966,180	956,790		

Personnel by Cost

Personnel by Cost

- Personnel above budget cost are Gail, George, Jenny, Jim, Monique, Sarah, Stanley and Tom.
- Personnel below cost are Erica, Inigo and Larry.
- Personnel within budget cost are Crystal and Sondra.



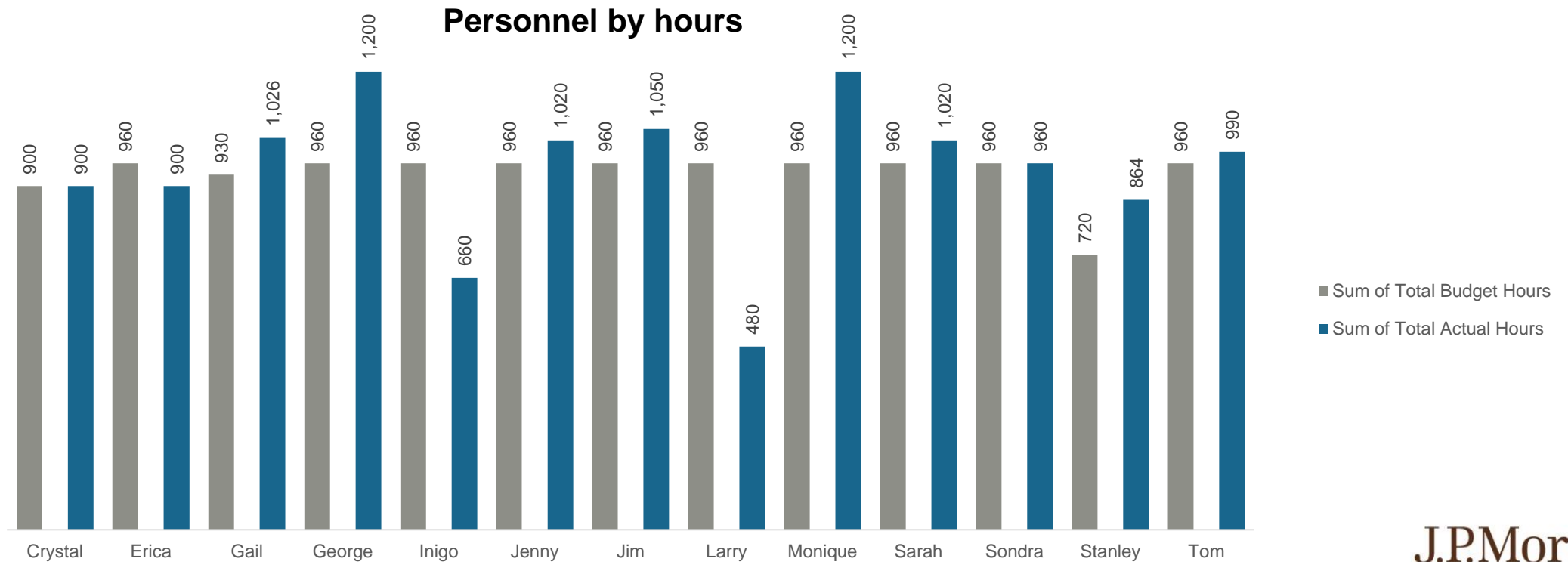
Personnel by Hours

The fourth insight gotten is personnel by hours. The sum total of personnel budget and actual hours were gotten using pivot table as shown below:

[illegible]

Personnel by Hours

- Personnel above budget hours are Gail, George, Jenny, Jim, Monique, Sarah, Stanley and Tom.
- Personnel below budget are Erica, Inigo and Larry.
- Personnel within budget hours are Crystal and Sondra.



Personnel by Cost/hr

The last insight gotten is personnel by cost/hr. The sum total of personnel cost/hr were gotten using pivot table as shown below:

Row Labels	Sum of Cost \$ / hr	
Crystal	\$600	
Erica	\$560	
Gail	\$400	
George	\$480	
Inigo	\$95	
Jenny	\$225	
Jim	\$180	
Larry	\$88	
Monique	\$420	
Sarah	\$150	
Sondra	\$45	
Stanley	\$600	
Tom	\$70	
Grand Total	\$3,913	

Personnel by Cost/hr

Personnel by cost/hr

- From our chat below, the data shows that the personnel that cost the most is Crystal and Stanley.
- They both cost \$600.

Personnel cost/hr

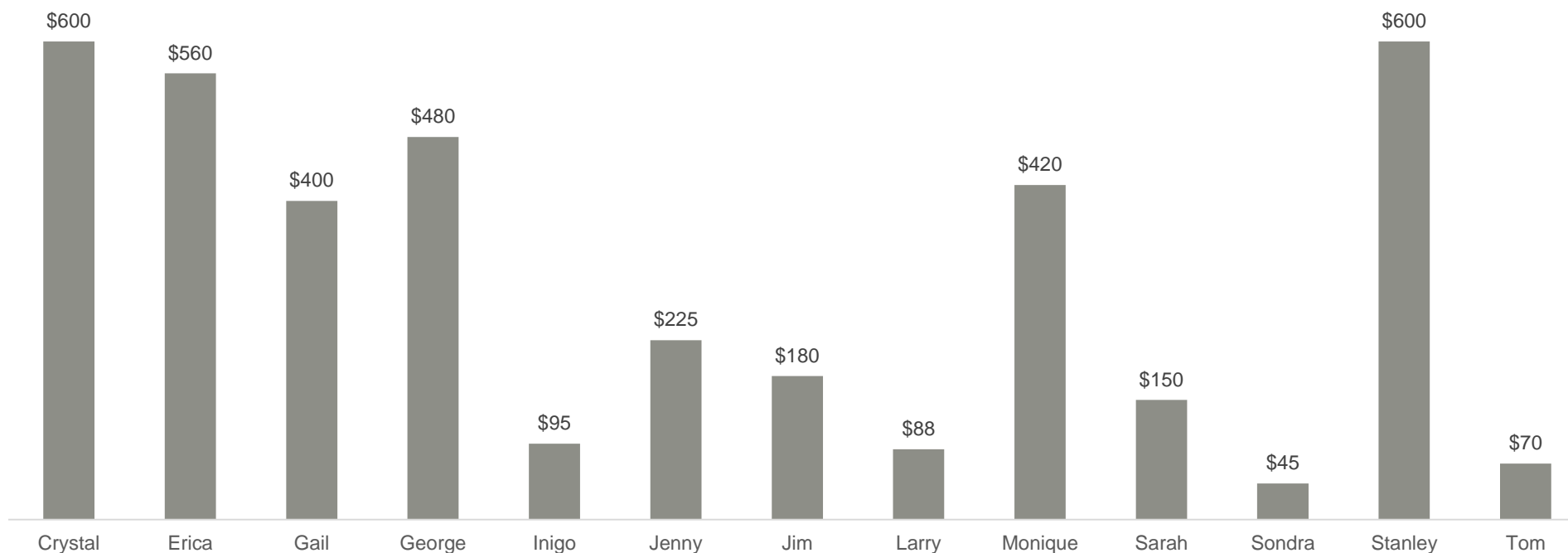


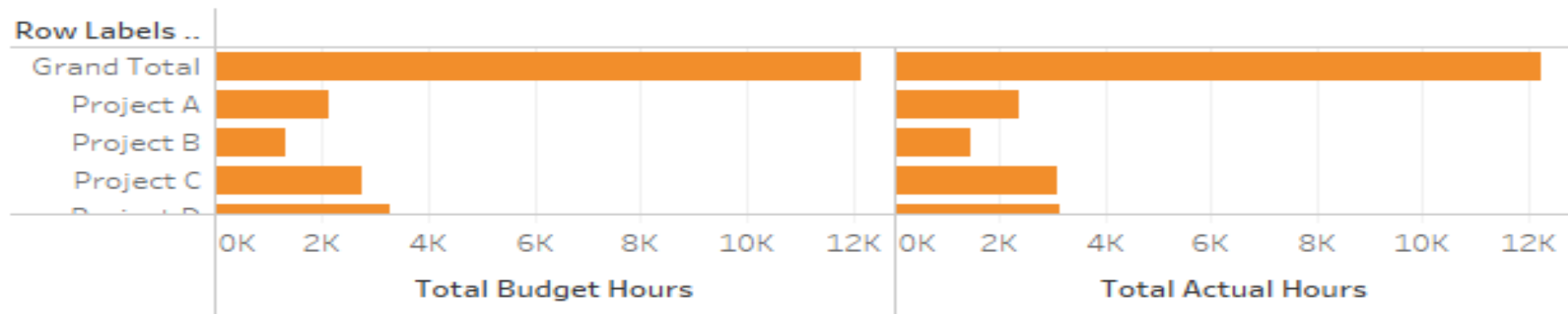
Tableau Visualization

After using pivot tables to analyze and present the insights, the insights were then visualized using tableau as shown in the screenshots below

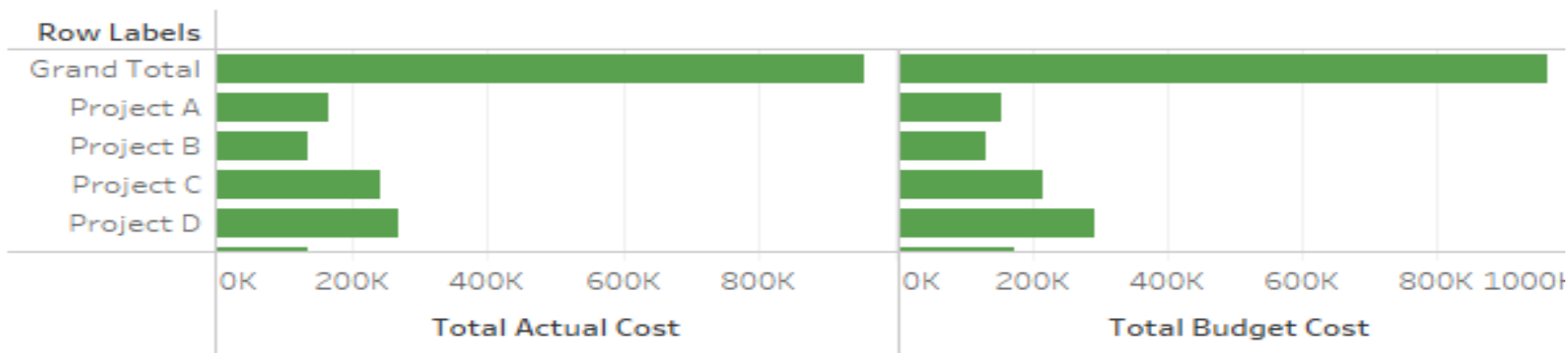
Note: Only cost of the projects were visualized

Project Budget to Actual cost

Project Budget Cost

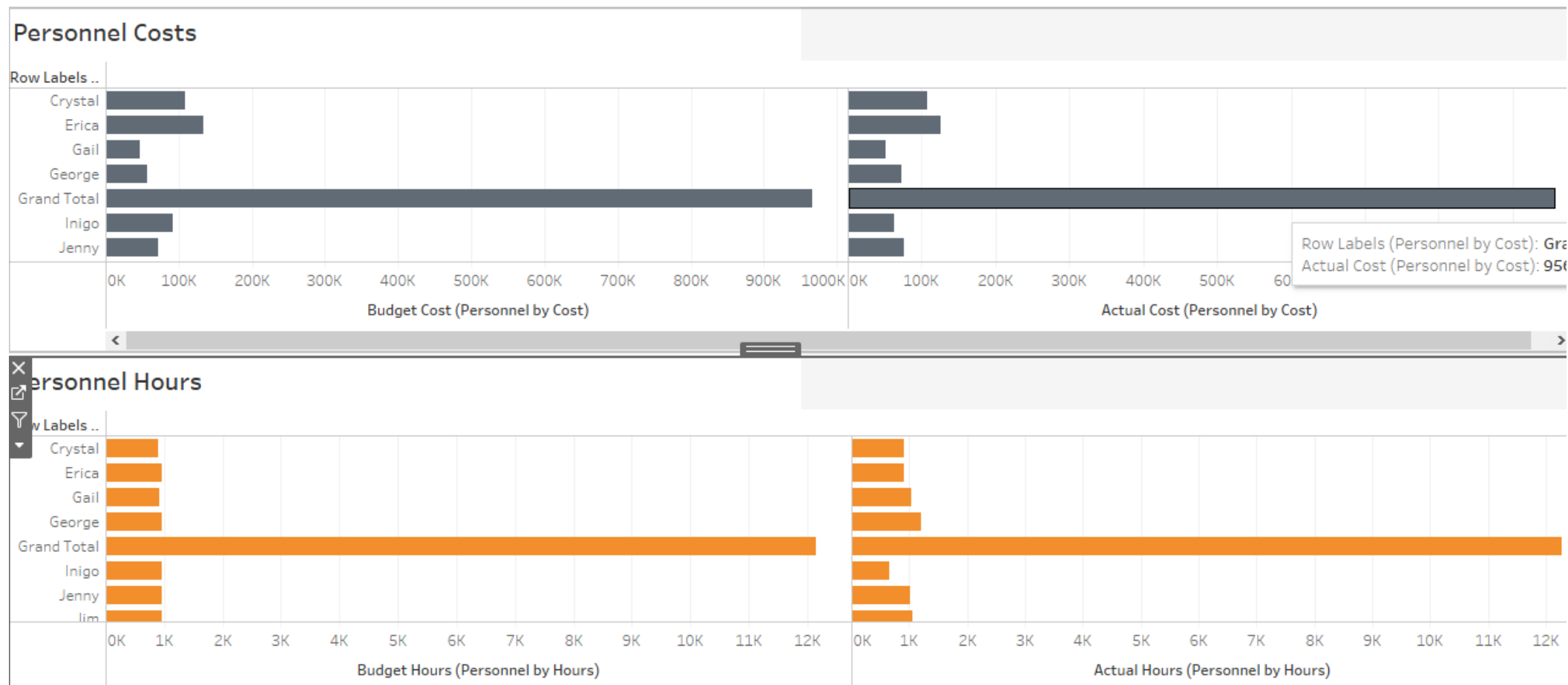


Project Actual Cost



Project Budget to Actual cost

Personnel Budget to Actual cost



Personnel Budget to Actual cost

Result

From the analysis of this data using excel, pivot table function, tableau and power point, I successfully got the following insights

- 1) Projects above and below budget costs
- 2) Projects above and below budget hours
- 3) Personnel above and below budget costs
- 4) Personnel above and below budget hours
- 5) Personnel that cost the most

My skills were also improved in the following areas;

- Data Visualization
- Data Transformation
- Data Exploration
- Research



THANK YOU