JUNE 2025

**Version 3.0**

Business Requirement Document

Individual Scorecard/Dashboard

Document Review and Approval

|  |  |  |  |
| --- | --- | --- | --- |
| Revision history | | | |
| **Version** | **Author** | **Date** | **Revision** |
| 1.0 | Mohammed Naveed Khan | 06/20/2025 | 1.0 |
| 1.0 | Mohammed Naveed Khan | 06/27/2025 | 2.0 |

|  |  |  |  |
| --- | --- | --- | --- |
| Reviewers | | | |
|  | **Reviewer** |  | **Date Reviewed** |
|  | Raj Vardhan |  |  |
|  | Abhishek Paul. |  |  |
|  | Shubham Prakash |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Approvers | | | |
|  | **Approver** |  | **Date of Approval** |
|  | Shubham Prakash |  | 06/27/2025 |
|  | Abhishek Paul |  |  |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Project Stakeholders | | |  |
|  | **Names** |  | Responsibility Matrix |
|  | Prathap P |  | Power BI developer |
|  | Bipinkumar Fatesingh, Baghel |  | ETL developer |
|  | Shubham Prakash |  | Dev Lead/ Project manager |
|  | Abhishek Paul |  | Business owner |
|  | Raj Vardhan |  | Delivery manager |
|  | Mohammed Naveed Khan |  | Business Analyst |

Table of Contents

[1.Introduction 3](#_Toc201311640)

[2.Business Process Overview 3](#_Toc201311641)

[3. Dependency 9](#_Toc201311642)

[4.Value Addition features 9](#_Toc201311643)

### 1.Introduction

#### 1.1. Objectives

The current objective is to enhance the existing scorecard with additional features that provide more information to various user roles. The aim is to create a single platform where all user roles can access comprehensive details about their own operations or those of their team members. This will streamline the process of monitoring and managing performance metrics, making it easier for users to gain insights and make informed decisions.

### 2.Business Process Overview

#### 2.1. Process AS-is

The objective of this project is to develop a centralized dashboard using Power BI to monitor utilization targets and other key performance indicators (KPIs) for FY25 across KPMG's service lines. The data must be updated in a shared drive by different stakeholders, and with the help of ETL processes, this data will be consolidated and populated into the dashboard. This will provide comprehensive insights into individual and team performance, enhancing management and decision-making capabilities. Utilization percentage goals vary by service line and need to be dynamic and customizable, with examples provided for different service lines.

#### 2.2 In scope Functionality:

* **GPS Scores-** For professionals managing SPAN – To monitor actuals vs target as assigned in IBOs
* **Facilitator training hours-** for Managers & above – To monitor actuals vs target as assigned in IBOs
* **L&D courses-** platforms like LINKEDIN, Degreed, PLURALSIGHT etc – To monitor actuals vs target as assigned in IBOs
* **Timesheet Defaulters-** To monitor actuals vs target as assigned in IBOs
* **SPAN EFFICIENCY Targets-** To be customized basis no. of people/counselees in a SPAN \*100
* **Extend Feedback-** For both Individuals and professionals managing Span
* **SPAN Utilization Targets-** To be customized basis industry/service line/IGH – Every Service line will have different Utilization targets and the same should reflect in anyone’s span from the same service line
* **WFH impact** on Utilization and relevant metrics
* **Peer Comparison metrics-** It would also include important metrics like Productivity, utilization, quality, and efficiency.

#### 2.3. Proposed solution/ Project Scope:

From the table below, the product owners are going to upload the data at a specified location which will be picked up by the tool based on the mentioned frequency. It will consolidate and update a dashboard to view the individual score cards as well as scorecards *for POD Leads, POD Managers, Director, PML and IGH level*. Each hierarchy of levels can view and monitor their respective tagged employees’ scorecards for their spans and their level.

*The individuals, POD Leads, POD Managers, Director and IGH data file is shared in the utilization, productivity file or we can refer to the POD Structure file too which will get published every week. Only actual hours for these professionals will be provided by their respective product owners.*

*Key Features*

* **Timesheet defaulters**- Map the metrices with the IBO’s Target.
* **Utilization Percentage Goals:** Utilization percentage goals vary by service line and need to be dynamic and customizable, with examples provided for different service lines.
* **Monthly Tracking of Targets:** While targets are set for the entire year, leadership tracks them monthly due to the cyclicity in the audit business.
* **Mapping Utilization Targets:** The need to map utilization targets at the service line level and possibly at the call center level.
* **Span Efficiency Targets:** The importance of customizing span efficiency targets based on the number of people in a span.
* **Work From Home Data:** Include work from home data in the scorecard, its importance for professionals. Proposal to reconcile work from home approvals with swipe in/out data to ensure accuracy.
* **Performance Comparison:** A visual showing the performance of professionals versus their peers from the same service line and designation. The primary parameter for comparison would be the number of hours worked. It would also include important metrics like productivity, utilization, quality, and efficiency.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Key Performance Indicators/Metrics** | **Product Owners to provide data** | **Frequency** | **Refresh Date** | **Export Feature** |
| GPS Scores | Chandana Basavaraj | YTD | Yearly | Available |
| Facilitator training hours | Christy | QTD | 10th of every month | Available |
| L&D courses | Manjunath, | Monthly | Bi-Weekly | Available |
| Timesheet Defaulters | Manaswini R | Weekly/ Bi-weekly | Bi-Weekly | Available |
| SPAN EFFICIENCY Targets | Vaibhav Sancheti | Monthly | 15th every month | Available |
| Extend Feedback | Praveen B | Monthly | Quarterly | available |
| SPAN Utilization Targets |  | Quarterly | Quarterly | Available |
| WFH |  | Real time |  |  |
| Peer Comparison Metrics |  | Real time |  |  |

#### 2.4 Key Features for dashboard

|  |  |  |
| --- | --- | --- |
| Feature | Description/Phase | Priority |
| 1. | **GPS Scores-** Regularly monitor the actual GPS scores against the targets set in the IBOs for professionals managing SPAN. Ensure timely updates and address any discrepancies. | Medium |
| 2. | **Facilitator training hours**- Track the actual training hours for managers and above, comparing them to the targets assigned in the IBOs. Identify areas where additional training may be needed. | Medium |
| 3. | **L&D courses**- Monitor the completion rates of courses on platforms like LinkedIn, Degreed, and Pluralsight. Compare actuals to targets set in the IBOs and encourage participation in relevant courses. | Medium |
| 4. | **Timesheet Defaulters**- Keep an eye on timesheet submissions and identify defaulters. Compare actual submissions to targets from SYNC data to implement measures and improve compliance. | Medium |
| 5. | **SPAN EFFICIENCY Targets**- Customize efficiency targets based on the number of people or counselees in a SPAN. Ensure these targets are realistic and achievable and regularly review performance against them. | Medium |
| 6. | **Extend Feedback**- Collect and analyze feedback from both individuals and professionals managing SPAN. | Medium |
| 7. | **SPAN Utilization Targets**- Customize utilization targets based on industry, service line, or IGH. Ensure that these targets are reflected accurately in the spans of individuals from the same service line and monitor performance against them. | Medium |
| 8. | **WFH-** Inclusion of work from home data in the scorecard emphasizing its importance for the data's accuracy and availability. Considering **40%** of total WFH Tenure as attendance. | Medium |
| 9. | **Peers Comparison Metrics -** The primary parameter for comparison would be the number of hours worked. It would also include important metrics like Productivity, utilization, quality, and efficiency. | Medium |

#### 2.5 Key Features Visualization format

|  |  |  |
| --- | --- | --- |
| **Metrics in 1.0release** | **Metrics in 2.0 release** | **Metrics in 3.0 release** |
| 1.Productivity | 1.Leaves History | 1. GPS Scores |
| 2.Utilisation | 2.Span Attrition | 2. Facilitator training hours |
| 3.Quality Score | 3.CSR hours | 3.  L&D courses |
| 4.Quarter wise Actuals vs Target | 4.GTS MS Certifications | 4.  Timesheet Defaulters |
| 5.L&D Trainings | 5. Efficiency | 5.  SPAN EFFICIENCY Targets |
| 6.Efficiency | 6.ELMER usage | 6.  Extend Feedback |
| 7**.** Seat Booking | 7. Client services excellence Nomination | 7.  SPAN Utilization Targets |
| 8. Office Attendance | 8.CSAT Integration | 8. WFH |
| 9. Cab No Show |  | 9. Peers Comparison Metrics |

#### 2.6 Appendix

|  |  |  |
| --- | --- | --- |
| Attachments | Descriptions/details. | Access |
| 1. GPS Scores |  |  |
| 2. Facilitator training hours |  |  |
| 3.  L&D courses |  |  |
| 4.  Timesheet Defaulters |  |  |
| 5.  SPAN EFFICIENCY Targets |  |  |
| 6.  Extend Feedback |  |  |
| 7. SPAN Utilization Targets |  |  |
| 8.WFH |  |  |
| 9. Peers comparison Metrics |  |  |

**The Data for these files are being stored in a Shared Drive “G:\GDC-Pulse Project” which will be accessed by respective Stakeholders who are responsible for updating the data files.**

#### Out of Scope

The responsibility for ensuring the completeness and accuracy of data lies with the stakeholders, and it is beyond the team's scope to manage this aspect.

### 3. Dependency

* Respected Stakeholders to upload the data to run the workflow seamlessly
* Data Accuracy and Completeness also depends on respected Stakeholders.
* Business needs to be stick to the format.

### 4.Value Addition features

#### Enhanced User Experience:

* + Interactive Dashboard: Incorporate interactive elements such as filters, drill-down capabilities, and customizable views to allow users to tailor the dashboard to their specific needs.
  + User Training: Provide training sessions or tutorials to help users navigate and utilize the dashboard effectively. This can enhance their experience and ensure they make the most of the available features.

#### Centralized Data Access:

* + Data Integration: Ensure seamless integration of data from various sources by using robust data connectors and APIs. This will help maintain data accuracy and consistency.
  + Data Security: Implement strong security measures to protect sensitive information and ensure that only authorized users have access to the data.

#### Targeted Metrics:

* + Customizable KPIs: Allow users to customize KPIs based on their specific goals and objectives. This can help in tracking metrics that are most relevant to their roles and responsibilities.
  + Benchmarking: Introduce benchmarking features that allow users to compare their performance against industry standards or peers. This can provide valuable insights and drive improvement.

#### Regular Data Updates

* + Automated Updates: Implement automated data update processes to ensure that the dashboard always reflects the most current information. This can save time and reduce the risk of errors.
  + Notification System: Set up a notification system to alert users when new data is available or when there are significant changes in performance metrics. This can help them stay informed and take timely actions.