**Write Up of my Analysis**

*\*Please open the PitchBook BI Analyst Assessment (.pbix) file using Microsoft Power BI Desktop only.*

*This document is associated with the Power BI report file mentioned above which is in the same folder. Please look at the report while reading this document otherwise it won’t be easy to understand.*

**Broad Overview**

According to the Sample Case-Study data, the Data Operations team which performs secondary research online gathering relevant information, consists of 299 secondary researchers distributed across 54 Research Groups.

This team handles profiles of 56,931 clients by assigning each profile a separate workflow which means the team is working on 56,931 workflows.

The 56,931 clients are spread across 11 regions which are Africa, Asia, Australia/Pacific, Europe, Greater China, India, Israel, Middle East, North America & South America.

Out of the 56,931 workflows, 32,941 workflows have been closed by the teams working on them and 25,637 are pending to be completed.

All the research groups combined have so far worked on the closed as well as pending workflows for 32,205.5 hours earning 1,915,745 benchmark points in the process. This shows that they have put a lot of efforts in the research and added an immense amount of research data to the profiles.

However out of the 56,931 workflows 2,360 are workflows created with wrong information and cannot be worked on. Hence, there are 2,360 unassigned workflows which will be assigned to more relevant teams. So, the overall workflow inefficiency is 4.15% (which will be explained later).

While working, the workflows can be assigned one out of these 4 priority levels which are – Emergency, High, Regular, Low.

Moreover, the workflows are categorized into 81 different workflow types which can contain a combination of any number of workflow processes out of the 16 different workflow processes available, depending upon the requirements.

After working on the workflows, they are assigned one out of the 7 workflow status which are – Closed, Pending Primary, Pending Secondary, Pending QA, Pending Survey, Pending Correction & Pending Deletion.

Let us look at how the team leader can make use of the PitchBook BI Analyst Assessment report to track daily, weekly, and monthly tasks.

The Report shared in the Power BI (.pbix) file consists of 7 Tabs which are -

1. Workflows closed by Research Groups
2. Pending Workflows of Research Groups
3. Workflows Closed by Researchers
4. Pending Workflows of Researchers
5. Workflow Inefficiency
6. Benchmark Points Analysis
7. Hours Worked Analysis

*To Monitor team’s production (i.e., profiles worked on), on a daily basis, Analyze team’s performance on a monthly basis and Report monthly performance metrics to manager*, the Team Leader can utilize the 1st Tab which is the **Workflows closed by Research Groups**. This tab shows data only for the workflows which are closed.

The Team Leader can view broad stats including Workflows Closed, Associated Research Groups, Total Researchers, Total Workflow types, Workflow Inefficiency, Total Benchmark Points Earned and Total Hours Worked.

This tab allows the TL to filter data based on any Research Group to monitor a particular group’s productivity. Moreover, it allows the TL to filter the data further based on a particular profile, Workflow Priority, Workflow Type, Workflow Process, Region. The TL can also look at the data for any range of Created dates and Closed dates for daily, weekly and monthly analysis.

The TL can infer that,

A] the busiest Research Groups are -

1. (MUM-VC-NR) - Closed 3,564 profiles by working the most for 1940.76 hours earning the highest benchmark points of 131,513.
2. (MUM-PC-ALL-Swing) – Closed 2,844 profiles by working for 1697 hours earning 78,737 benchmark points.
3. (KOL-VC-CL) – Closed 2408 profiles by working for 1088.01 hours earning 73,921 benchmark points.

B] the least busy Research Groups are -

1. (MUM-SP/D1-S) – Closed 1 profile by working the least for hardly a minute earning 0 BPs.

2. (SEA -F-Bronze Shell Swing) – Closed 1 profile by working for 25 minutes and earning 30 BPs.

3. (SEA-FR-S&OCR) – Closed 12 profiles by working for 2.18 hours and earning 30 BPs.

C] around one-fifth of the closed workflows are of the type (Co VC - Regular Company), 3026 belong to the type (Co VC – New Round) and 2741 belong to (Co – Private Company) type.

D] around half of the closed profiles had a high-level priority (precisely 1037 profiles had an emergency priority followed by (precisely 14,002 profiles having high priority)

E] Majority of these closed workflows correspond to the region of North America (46.38 %) and Europe (32.31%).

F] around one-third of the closed workflows have Check-In process associated with them followed by 3,690 special request processes and 2,814 news processes.

*To Understand the workflow (i.e., what workflow should be prioritized) and to Understand how workflow is being generated* the TL can utilize the **Pending Workflow of RGs tab along with the Pending Workflow of Researchers Tab.** This tab shows data only for the workflows which are in the pending stage.

On the **Pending Workflow of RGs tab** the Team Leader can view broad stats including Workflows Pending, Associated Research Groups, Total Researchers, Total Workflow types, Workflow Inefficiency, Total Benchmark Points Earned and Total Hours Worked.

This tab allows the TL to filter data based on any Research Group to monitor a particular group’s productivity. Moreover, it allows the TL to filter the data further based on a particular profile, Workflow Priority, Workflow Status, Workflow Type, Workflow Process, Region. The TL can also look the data for any range of Created dates and Secondary Research completed dates for daily, weekly, and monthly analysis.

The TL can infer that,

A] around two-fifths of the pending profiles have a high priority (precisely 10,610) followed by 1,249 having an emergency priority.

B] around one-fourth of the pending workflows are of the type (Co VC - Regular Company), 2,841 belong to the type (Co VC – New Round) and 2,339 belong to (Co PE - Regular Company) type.

C] around three-fifths of the pending profiles are pending for Survey (precisely 15,570) followed by 30% pending for primary research.

D] Majority of these pending workflows correspond to the region of North America (52.04 %) and Europe (31.81%).

F] around 44% of the pending workflows have Check-In process associated with them followed by 3,481 news processes and 2,451 secondary processes.

G] the Research Groups with most pending work are -

1. (MUM-VC-NR) - Has 4461 pending profiles having worked the most for 2396.45 hours earning the highest benchmark points of 171,352.
2. (KOL-VC-CL) – Has 2,542 profiles having worked for 1244.04 hours earning 83,628 benchmark points.
3. (MUM-PE-CL) – Has 1,923 pending profiles having worked for 1,393.36 hours earning 70,345 benchmark points.

B] the least busy Research Groups are -

1. (MUM-PF (2)) – Has 3 pending profiles having worked the least for hardly an hour earning

110 BPs.

2. (MUM-PF (4)) – Has 5 pending profiles having worked for 1.49 hours and earning 165 BPs.

3. (SEA -F-Bronze Shell Swing)) – Has 9 pending profiles by working for 4.18 hours and earning

449 BPs.

On the **Pending Workflow of Researchers tab** the Team Leader can view broad stats including Workflows Pending, Associated Research Groups, Total Researchers, Total Workflow types, Workflow Inefficiency, Total Benchmark Points Earned and Total Hours Worked.

This tab allows the TL to filter data based on any individual Secondary Researcher to monitor a particular researcher’s productivity. Moreover, it allows the TL to filter the data further based on a particular profile, Workflow Priority, Workflow Status, Workflow Type, Workflow Process, Region. The TL can also look the data for any range of Created dates and Secondary Research completed dates for daily, weekly, and monthly analysis.

The TL can infer that,

A] around two-fifths of the pending profiles have a high priority (precisely 10,610) followed by 1,249 having an emergency priority.

B] around one-fourth of the pending workflows are of the type (Co VC - Regular Company), 2,841 belong to the type (Co VC – New Round) and 2,339 belong to (Co PE - Regular Company) type.

C] around three-fifths of the pending profiles are pending for Survey (precisely 15,570) followed by 30% pending for primary research.

D] Majority of these pending workflows correspond to the region of North America (52.04 %) and Europe (31.81%).

F] around 44% of the pending workflows have Check-In process associated with them followed by 3,481 news processes and 2,451 secondary processes.

G] the Researchers with most pending work are -

1. (Researcher 56) - Has 448 pending profiles having worked the most for 89.69 hours earning the highest benchmark points of 15,360.
2. (Researcher 77) – Has 430 pending profiles having worked for 121.58 hours earning 14,588 benchmark points.
3. (Researcher 92) – Has 245 pending profiles having worked for 48.98 hours earning 2,730 benchmark points.

B] the least busy Researchers are -

1. (Researcher 210) – Has 1 pending profile having worked the least for hardly 6 minutes

earning 0 BPs.

2. (Researcher 249) – Has 1 pending profile having worked for 30 minutes hours and earning

30 BPs.

3. (Researcher 245) – Has 1 pending profile having worked for 38 minutes and earning 50 BPs.

*To Track individual researcher’s performance, Report production numbers to the manager, have meetings with individual researchers to discuss their performance and Report monthly performance metrics to manager*, the TL can utilize the **Workflows closed by Researchers Tab.** This tab shows data only for the workflows which are closed.

The Team Leader can view broad stats including Workflows Closed, Associated Research Groups, Total Researchers, Total Workflow types, Workflow Inefficiency, Total Benchmark Points Earned and Total Hours Worked.

This tab allows the TL to filter data based on any individual Researcher to monitor a particular Researcher’s productivity. Moreover, it allows the TL to filter the data further based on a particular profile, Workflow Priority, Workflow Type, Workflow Process, Region. The TL can also look the data for any range of Created dates and Closed dates for daily & monthly analysis.

The TL can infer that,

A] the busiest Researchers are -

1. (Researcher 45) - Closed 616 profiles by working for 104.09 hours earning one of the highest benchmark points of 14,190.
2. (Researcher 69) – Closed 509 profiles by working for 208.45 hours earning 17,012 benchmark points.
3. (Researcher 136) – Closed 454 profiles by working for 124.62 hours earning 12,300 benchmark points.

B] the least busy Research Groups are -

1. (Researcher 257) – Closed 1 profile by working the least for hardly a minute earning 30 BPs.

2. (Researcher 288) – Closed 1 profiles by working for 25 minutes and earning 30 BPs.

3. (Researcher 273) – Closed 1 profile by working for 2.32 hours and earning 57 BPs.

C] around one-fifth of the closed workflows are of the type (Co VC - Regular Company), 3026 belong to the type (Co VC – New Round) and 2741 belong to (Co – Private Company) type.

D] around half of the closed profiles had a high-level priority (precisely 1037 profiles had an emergency priority followed by (precisely 14,002 profiles having high priority)

E] Majority of these closed workflows correspond to the region of North America (46.38 %) and Europe (32.31%).

F] around one-third of the closed workflows have Check-In process associated with them followed by 3,690 special request processes and 2,814 news processes.

*To Understand how workflow is being generated, whether there are any gaps and inefficiencies,* the TL can utilize **the Workflow Inefficiencies Tab**. This tab shows data for all the types of workflows.

The Team Leader can view broad stats including Workflow Inefficiency %, Unassigned Workflows and Total Workflows.

**Workflow Inefficiency % = [Total Unassigned Workflows / Total Workflows] \* 100**

This tab allows the TL to filter data based on any individual Researcher or Research Group to monitor the respective Workflow Inefficiency %. Moreover, it allows the TL to filter the data further based on Workflow Priority, Workflow Status, Workflow Type, Workflow Process, Region. The TL can also look the data for any range of Created dates and Secondary completed dates for daily, weekly, and monthly analysis.

**The overall workflow inefficiency is 4.15 % as out of 56,931 workflows 2,360 are unassigned.**

The TL can infer that,

A] The researchers with the highest inefficiency are researcher 290 with workflow inefficiency of 40.91 % followed by researcher 258 with workflow inefficiency of 35%, and researchers 214 and 95 with workflow inefficiency of 25% and 20% respectively.

B] The research groups with the highest inefficiency are (MUM-PE-NC) with workflow inefficiency of 19.43% followed by (MUM-PE-NC-Training) and (MUM-VC-NC) with workflow inefficiencies of 16.4% and 14.99%.

C] The workflow types associated with the most workflow inefficiencies are (Co Early Stage – Investment Close) with workflow inefficiency of 36.45% followed by (Co VC - Investment Close) and (Co Debt New Company) with workflow inefficiencies of 31.06% and 19.61% respectively.

D] Surprisingly, the workflows with high priority have the highest inefficiency of 6.2% followed by those having a regular priority with an inefficiency of 4.13 % followed by those with low priority having an inefficiency of 1.2%. Fortunately, workflows having an emergency priority have an inefficiency less than 1%.

E] The workflow inefficiency is the highest for the workflows associated with the Conference (16.67%), Delete (13.79%) and Cleanup processes (11.54%).

F] The workflow inefficiency is the highest in India (6.16%) and Africa (6.14%) followed by Israel (5.48%) and South America (5.28%)

*To Revise targets for the team* the TL can utilize the **Benchmark Points Analysis & Hours Worked Analysis Tabs**. These tabs show data for all the types of workflows.

The Team Leader can view broad stats including Average Benchmark Points, Median Benchmark Points, Average Hours Worked, Median Hours Worked.

Both these tabs allow the TL to filter data based on any individual Researcher or Research Group to monitor the respective stats. Moreover, it allows the TL to filter the data further based on Workflow Priority, Workflow Status, Workflow Type, Workflow Process, Region. The TL can also look the data for any range of Created dates and Secondary completed dates for daily, weekly, and monthly analysis.

To raise the targets for the Average Benchmark Points from 33.73 to let’s say 40, the team leader can advise the researchers to

1. To put the same kind of efforts for tasks of all priorities (as the average benchmark points is lower for the tasks with low and regular priorities).
2. To put the same kind of efforts for all the types of workflow types
3. To put the same kind of efforts for all the different processes (the average is above 40 for post news, conference, news and survey and it is below 40 for others)
4. To put the same kind of efforts for the workflows of all countries (the average is the highest for Greater China Region at 40.93 and lower than 40 for all other regions)

The team leader can also advise and motivate the team to work with the same enthusiasm for all the tasks. The TL can also conduct a detailed survey to find out the strengths, weakness, interests of the researchers and assign them tasks according to their ability and interests.

To lower the targets for the Average Hours Worked from 0.57 (~ 1) to let’s say 0.45, the team leader can advise the researchers to work smartly using AI tools like ChatGPT, copilot and Gemini to reduce the time taken to complete each task.

The TL can also conduct a detailed survey to find out the time consumed by researchers for tasks which are their strengths, tasks which are their weakness, tasks which interest them the most and tasks which interest them the least and assign them tasks according to their ability and interests.

If researchers get to work on tasks which are best suited for them, they will take lesser amount of time to complete the tasks.

This concludes the write-up associated with the Report.

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