Employee Data Analysis using Excel

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PROJECT TITLE

Employee Performance Analysis using Excel

AGENDA

1.Problem Statement
2.Project Overview
3.End Users
4.Our Solution and Proposition
5.Dataset Description
6.Modelling Approach
7.Results and Discussion
8.Conclusion

PROBLEM STATEMENT

- Purpose of tracking employee performance in Excel is to streamline data collection and reporting for HR management. It helps in identifying trends, strengths, and areas for improvement by organizing data into clear formats. Additionally, Excel facilitates performance appraisals, ensuring consistency and fairness in evaluating employees against key performance indicators (KPIs).

PROJECT OVERVIEW

•This project focuses on analyzing employee performance data in Excel using advanced tools like Pivot Tables for summary reports, Slicers for interactive filtering, and Conditional Formatting to highlight performance trends. By applying IF functions, performance ratings and bonuses are calculated based on predefined criteria. Conditional formatting and filtering also help eliminate blanks, ensuring clean data. The project aims to provide a clear view of individual and team performance, allowing for better decision-making and targeted improvement strategies.

WHO ARE THE END USERS?

- HR Managers
- Team Leaders
- Senior Management
- Employees
- HR Analysts
- Recruitment Teams
- Training Departments
- Payroll/Finance Teams
- IT Teams
- Auditors/Compliance Teams

OUR SOLUTION AND ITS VALUE PROPOSITION

- CONDITIONAL FORMATTING - MISSING
- PIVOT TABLE - REMOVE
- FILTER - PERFORMANCE
- FORMULA - SUMMARY
- GRAPH - DATA VISUALISATION
- SLICER - PARTICULAR TYPE OF EMPLOYEE DATA

Dataset Description

- **EMPLOYEE PERFORMANCE ANALYSIS - KAGGLE**
- **26 FEATURES**
- **12 FEATURES USED**
- EMPLOYEE ID
- FIRST NAME
- LAST NAME
- EXIT DATE
- BUSINESS UNIT
- EMPLOYEE STATUS
- EMPLOYEE TYPE
- EMPLOYEE CLASSIFICATION TYPE
- GENDER CODE
- PERFORMANCE SCORE
- CURRENT EMPLOYEE RATING
- PERFORMANCE LEVEL

THE "WOW" IN OUR SOLUTION

1. PIVOT TABLE

2. SLICER

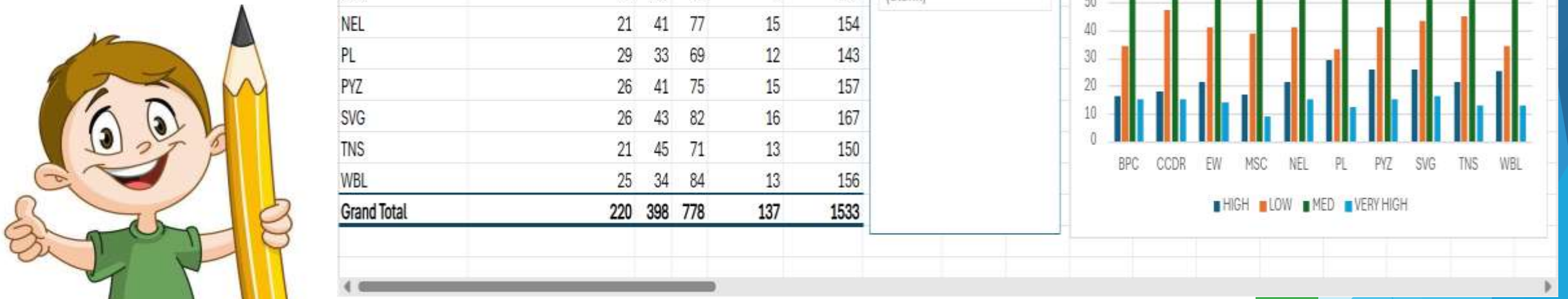
3. GRAPH

GenderCode (All)

Count of FirstName	PERFORMANCE LEVEL				
BusinessUnit	HIGH	LOW	MED	VERY HIGH	Grand Total
BPC	16	34	85	15	150
CCDR	18	47	65	15	145
EW	21	41	78	14	154
MSC	17	39	92	9	157
NEL	21	41	77	15	154
PL	29	33	69	12	143
PYZ	26	41	75	15	157
SVG	26	43	82	16	167
TNS	21	45	71	13	150
WBL	25	34	84	13	156
Grand Total	**220**	**398**	**778**	**137**	**1533**

EmployeeType

- Contract
- Full-Time
- Part-Time
- (blank)



- **Performance level =IFS(Z >= 5 , "VERY HIGH",Z8>=4,"HIGH", Z8 >= 3 , "MED",TRUE,"LOW")**

MODELLING

1. **Selecting Required Data**

Download Data: Obtain the dataset from Kaggle.
Open Data in Excel/Spreadsheet: Import the dataset into Excel or any spreadsheet application.
Filter Required Columns:
Locate the columns: Employee ID, First name, Last name, Exit date, Business unit, Employee status, Employee type, Employee classification type, Gender code, Performance score, Current employee rating, Performance level.
Copy these columns to a new sheet for easier manipulation.
Highlight Columns:
Select the columns of interest.
Apply yellow highlighting to these columns to emphasize them.

2. **Eliminating Blank Spaces in Exit Date**

Conditional Formatting:
Select the Exit date column.
Go to Home > Conditional Formatting > New Rule.
Choose Use a formula to determine which cells to format.
Enter a formula like =ISBLANK(A1) (adjust A1 to the first cell of your selected range).
Set the format to highlight blank cells.

3. **Describing Employees' Performance Level**

Using IFS Formula:

Add a new column named Performance Level Description.

Use the following formula to describe performance levels:

excel

Copy code **Performance level =IFS(Z >= 5 , "VERY HIGH",Z8>=4,"HIGH", Z8 >= 3 , "MED",TRUE,"LOW")**

4. Creating a Pivot Table

Insert Pivot Table:

Select your entire dataset including the highlighted and newly added columns.

Go to Insert > PivotTable.

Choose where you want the Pivot Table to be placed.

Configure Pivot Table:

Drag and drop relevant fields into the Rows, Columns, and Values areas as needed. For example:

Rows: Employee type, Performance level description

Values: Count of Employee ID or Performance score averages

Columns: Business unit, Exit date (if you want to analyze trends over time)

5. Adding Slicers and Graphs

Adding Slicers:

With the Pivot Table selected, go to PivotTable Analyze > Insert Slicer.
Choose the slicers for Employee type (e.g., Full-time, Part-time, Contract) and any other fields of interest.
Place and format the slicers on your worksheet.

Creating a Graph:

With the Pivot Table selected, go to Insert > Charts.
Choose a chart type that suits your data analysis, such as a column chart or pie chart.
Customize the chart to reflect the insights you need.

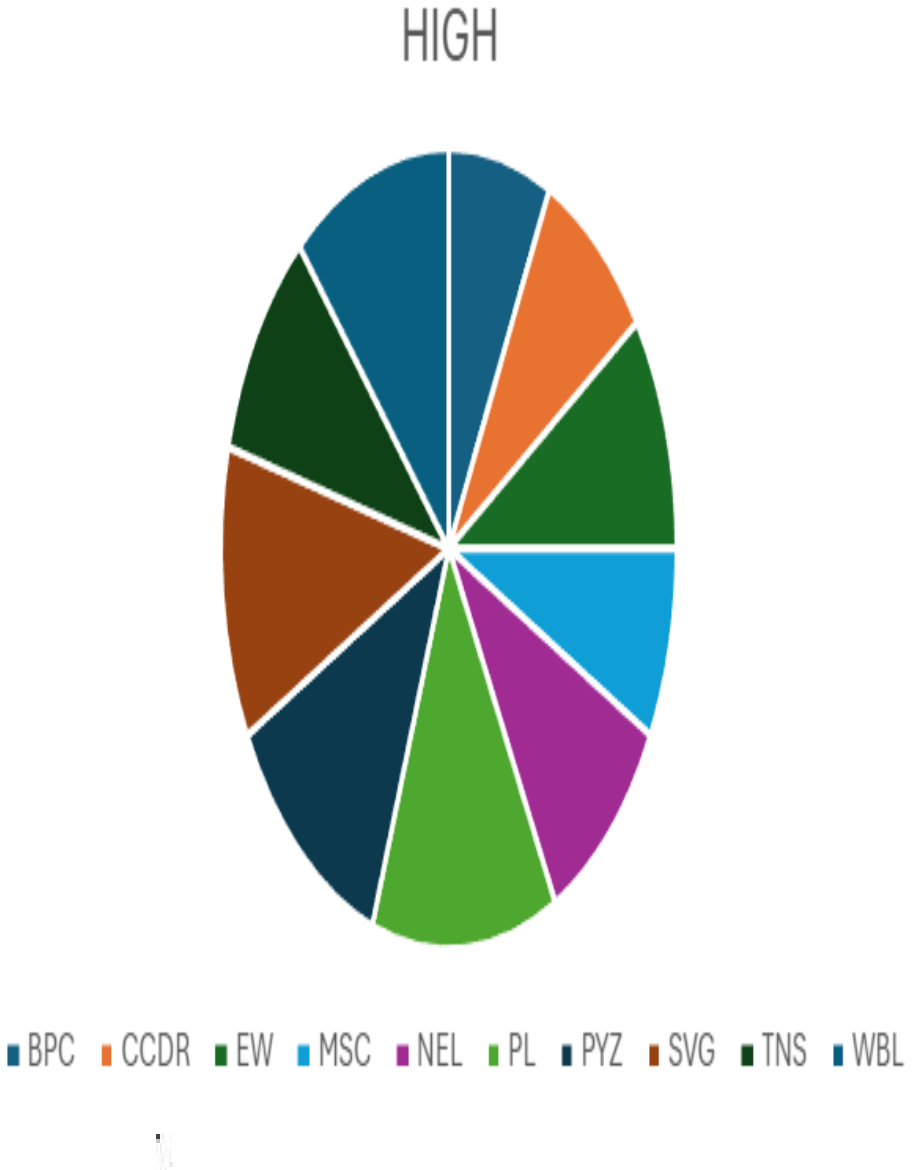
Summary

Highlight Required Data in the dataset.
Use Conditional Formatting to address blank spaces in the Exit date column.
Apply the IFS Formula to describe performance levels.

Create and Configure a Pivot Table to analyze data.

Add Slicers and Graphs to visualize and filter the data effectively

RESULTS


HIGH
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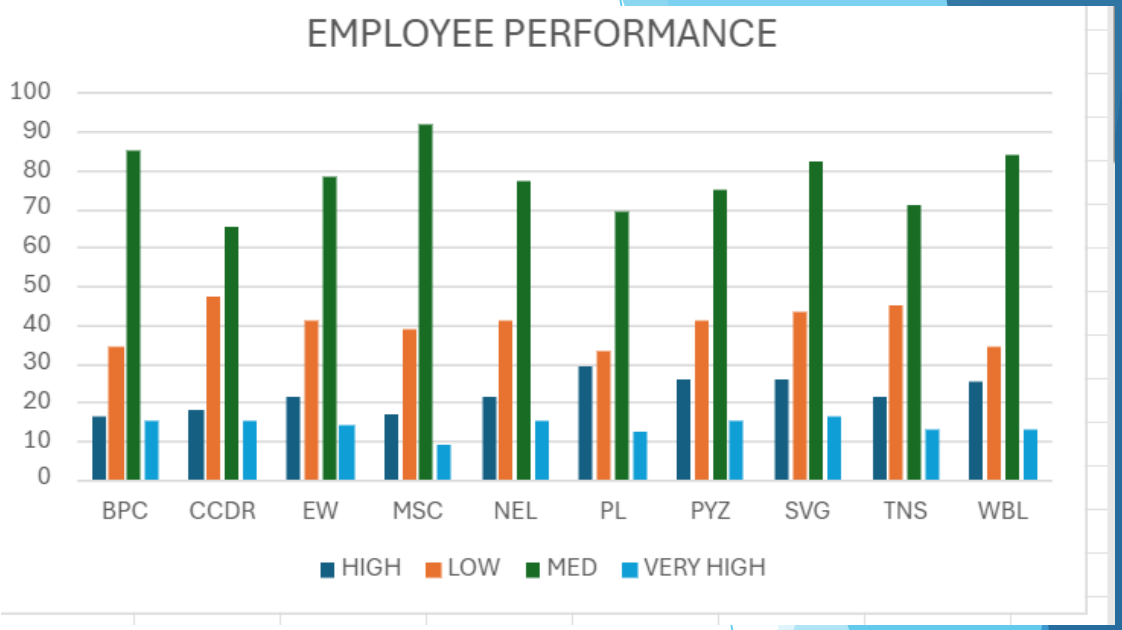
EMPLOYEE PERFORMANCE
100
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80
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20
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BPC
CCDR
EW
MSC
NEL
PL
PYZ
SVG
TNS
WBL
HIGH
LOW
MED
VERY HIGH

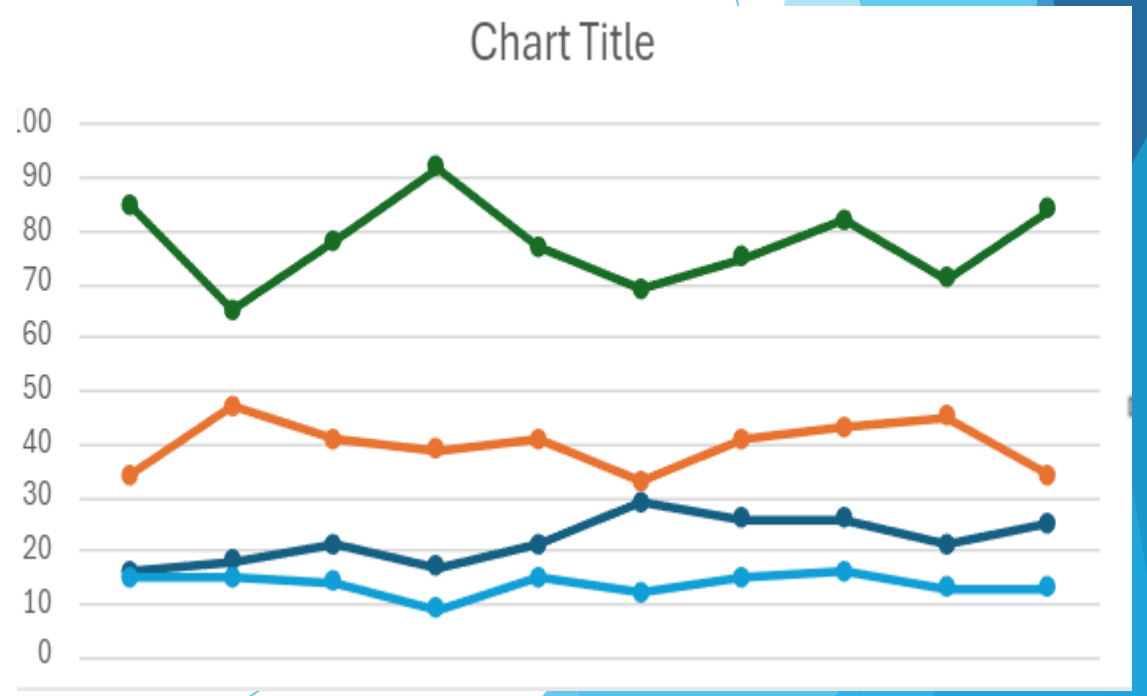
Chart Title
90
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conclusion

- This project provides actionable insights for improving employee management by clearly identifying performance levels and trends. It enables more effective workforce planning and decision-making by visualizing data and filtering by key metrics. Daily operations benefit from streamlined data handling and enhanced reporting accuracy. Managers can use this information to address performance issues and optimize staffing strategies. Overall, it supports better strategic and operational decisions within the firm.