

The Tableau HR Scorecard: Measuring Success In Talent Management. Project Report.

1. Define the Purpose and Objectives:

- Begin by clarifying the purpose of your HR scorecard analysis. Are you assessing employee performance, turnover, diversity, or something else? Define the specific objectives of your project.

2. Data Collection and Preparation:

- Collect relevant HR data, such as employee demographics, performance ratings, turnover rates, and other key metrics.
- Clean and preprocess the data using tools like Excel or Python to ensure it's suitable for analysis in Tableau.

3. Tableau Setup:

- Open Tableau and connect it to your prepared dataset.
- Arrange your data source with the necessary dimensions and measures.

4. Create Visualizations:

- Design various visualizations that will help you analyze HR data. Common visualizations include:
 - Bar charts to represent turnover rates by department or gender.
 - Line charts to track employee performance over time.
 - Pie charts or donut charts to display diversity and inclusion statistics.
 - Heat maps to show employee engagement levels.
 - Scatter plots to identify relationships between variables like performance and compensation.

5. Build the HR Scorecard:

- Construct a scorecard that provides an overview of your HR metrics. This could be a dashboard with multiple visualizations or a series of slides in Tableau Stories.
- Ensure the scorecard is user-friendly, visually appealing, and easy to understand for your audience.

6. Add Interactivity:

- Use Tableau's interactive features to allow viewers to filter, drill down, or explore the data on their own. This can make your presentation engaging and insightful.

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7. Data Insights:

- While presenting, make sure to highlight key insights from the data, such as trends, anomalies, and areas that require attention or improvement.

8. Storytelling:

- Build a narrative around your scorecard analysis. Explain the context, the current HR situation, and what the data reveals about the organization.

9. Annotations and Captions:

- Use captions and annotations in Tableau to add context to your visualizations and guide viewers through the story.

10. Video Creation:

- To create a presentation video, you can record your interactions with the Tableau workbook using screen recording software like Camtasia, OBS Studio, or ScreenFlow.
- You can also use Tableau's built-in functionality to record the interactions as a video.

11. Narration:

- Add voiceover narration to explain the insights and key takeaways from your HR scorecard analysis.

12. Editing:

- Edit the video to ensure a smooth flow, removing any mistakes or unnecessary pauses.

13. Export and Share:

- Export the final video in a suitable format for sharing. Common formats include MP4 or AVI.

14. Presentation:

- Present the video to your target audience. Be prepared to answer questions and discuss the insights revealed by your HR scorecard.