Referral Funnel and Hiring Analytics Dashboard

Role: Data Analyst | Tools: Python (Pandas, Matplotlib), Excel, Power BI

Problem

The clienta vehicle hire referral companyneeded to track and optimise its referral-to-hire funnel. Data was collected from multiple sources including referral systems, hire completion logs, and rejection reports. The team lacked a unified dashboard to monitor trends, identify drop-off points, and understand rejection reasons at scale.

My Approach

- Cleaned and joined datasets from referral, hire, and status tracking systems using Python (Pandas)

- Created visual dashboards and KPI snapshots in Power BI and Matplotlib

- Performed trend and funnel analysis to monitor monthly hires, conversions, and rejection rates

- Categorised and visualised top rejection reasons to identify operational bottlenecks

- Built a repeatable pipeline to automate monthly updates and ensure data quality

Results

- Delivered a dashboard suite covering the entire referral lifecycle: from intake to completed hire

- Enabled weekly insights into referral outcomes, improving client communication and team alignment

- Helped the team identify the top 3 rejection causes, allowing for targeted process improvements

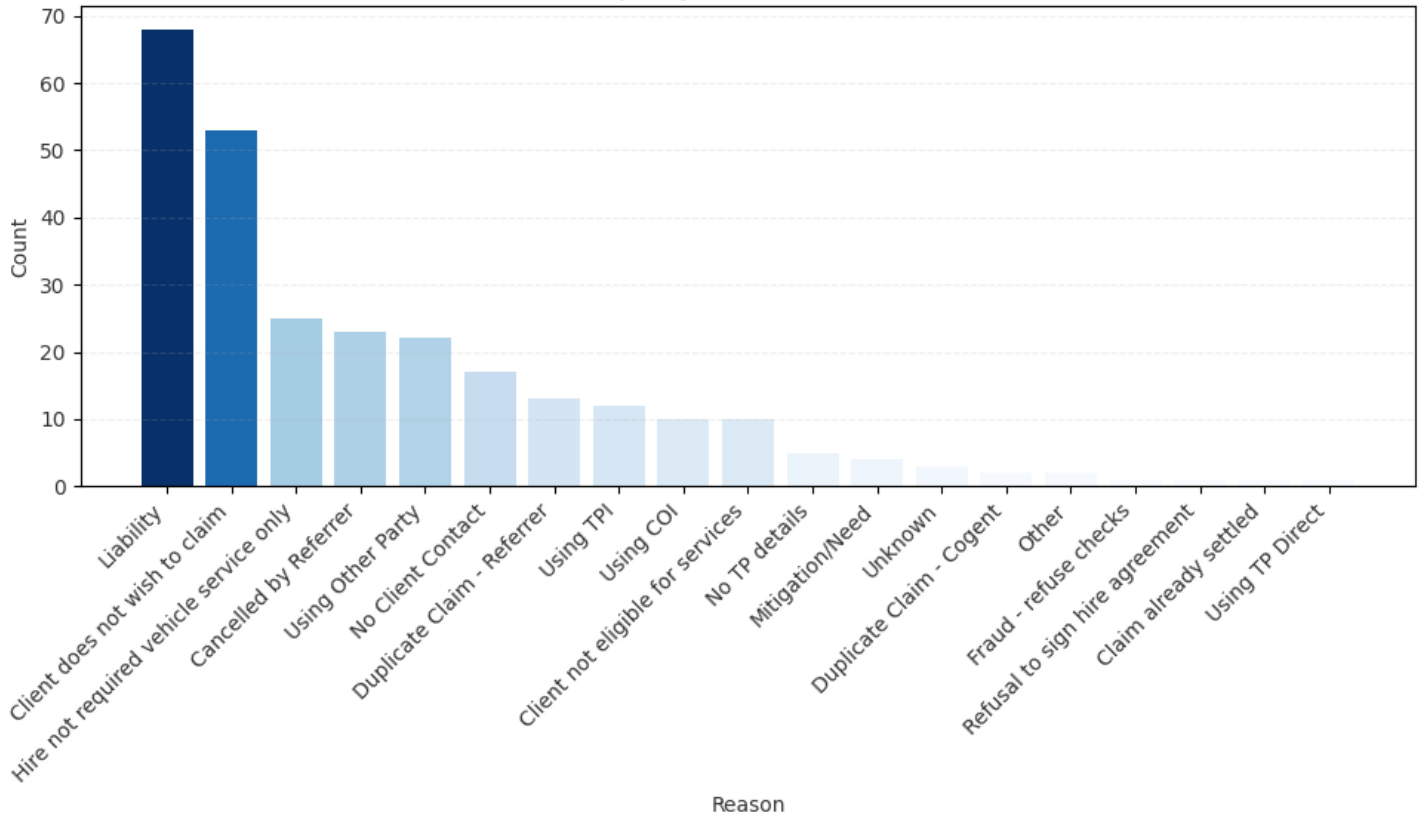- Reduced manual reporting time by 50% with automated, visual reporting tools
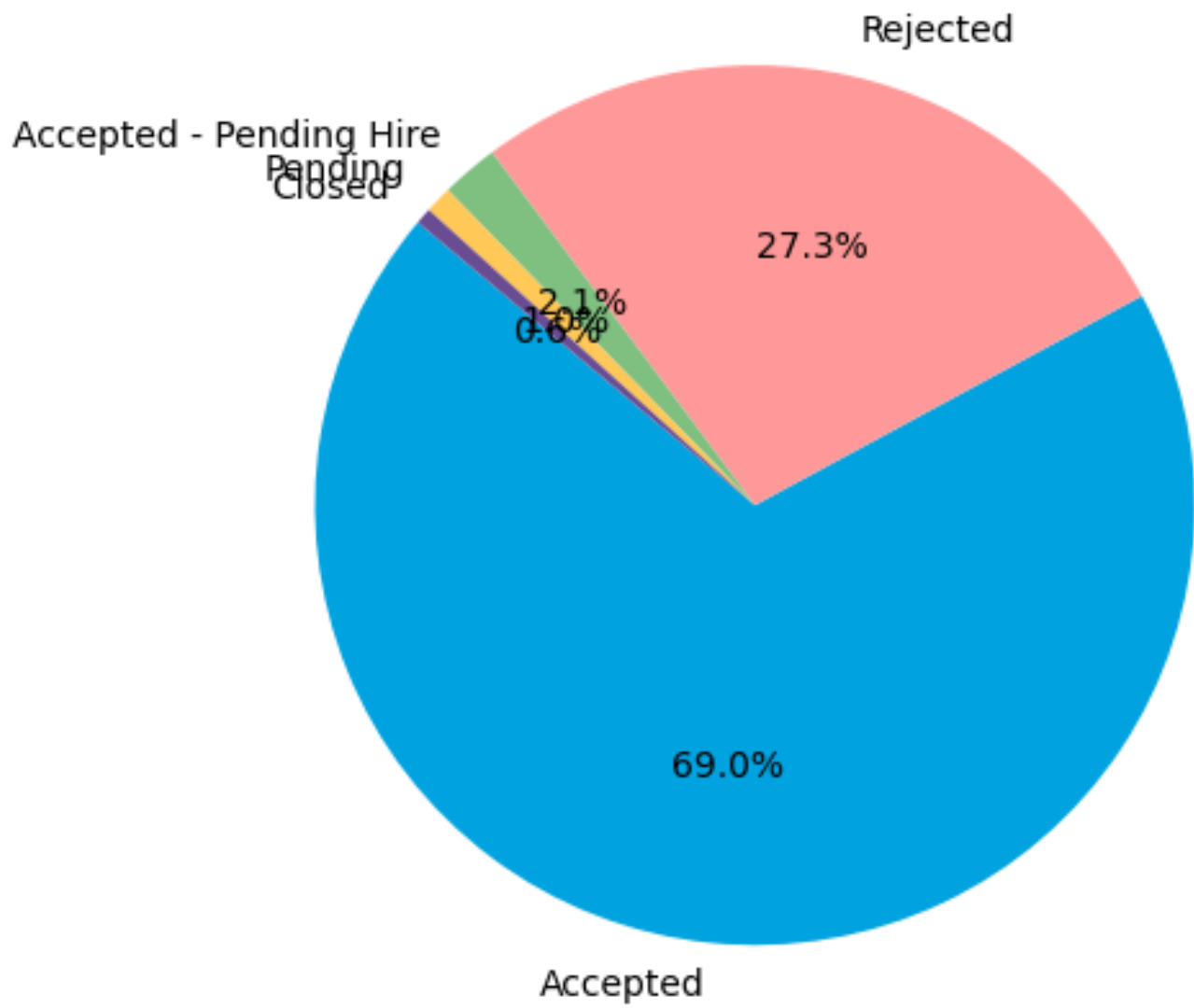
Monthly Completed Hires
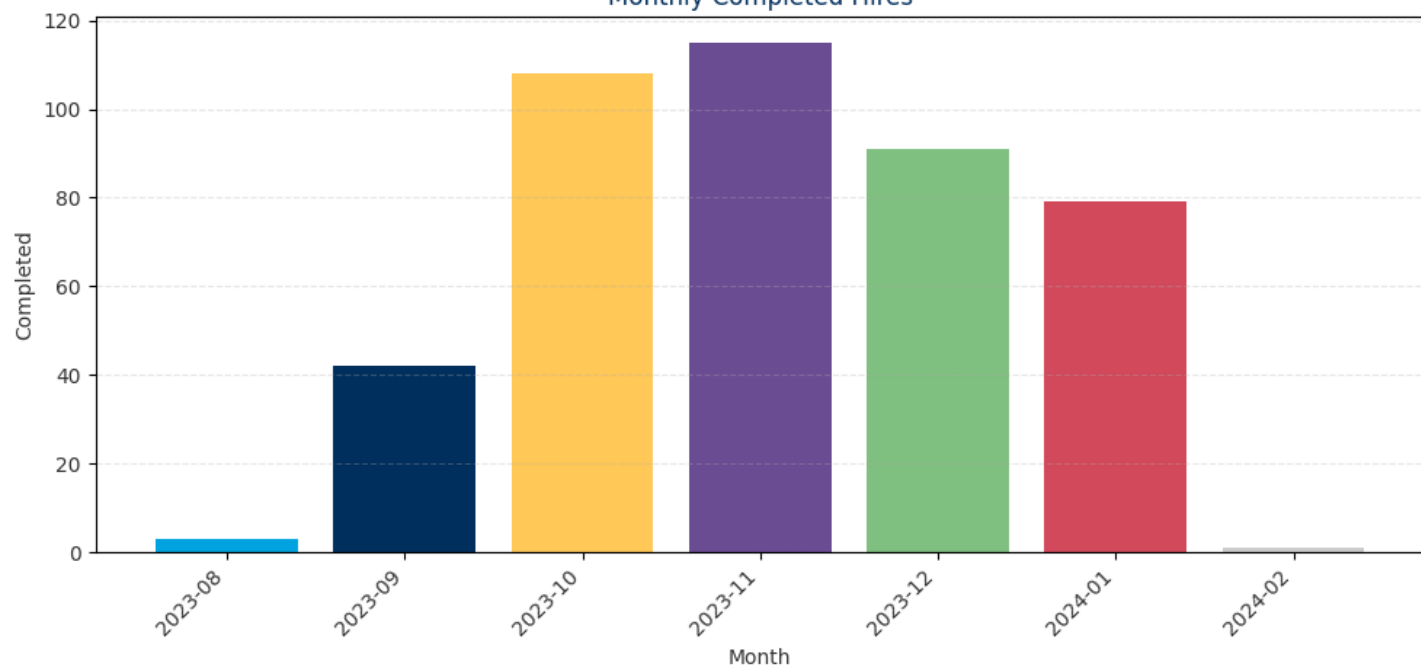
Monthly Hire Trend
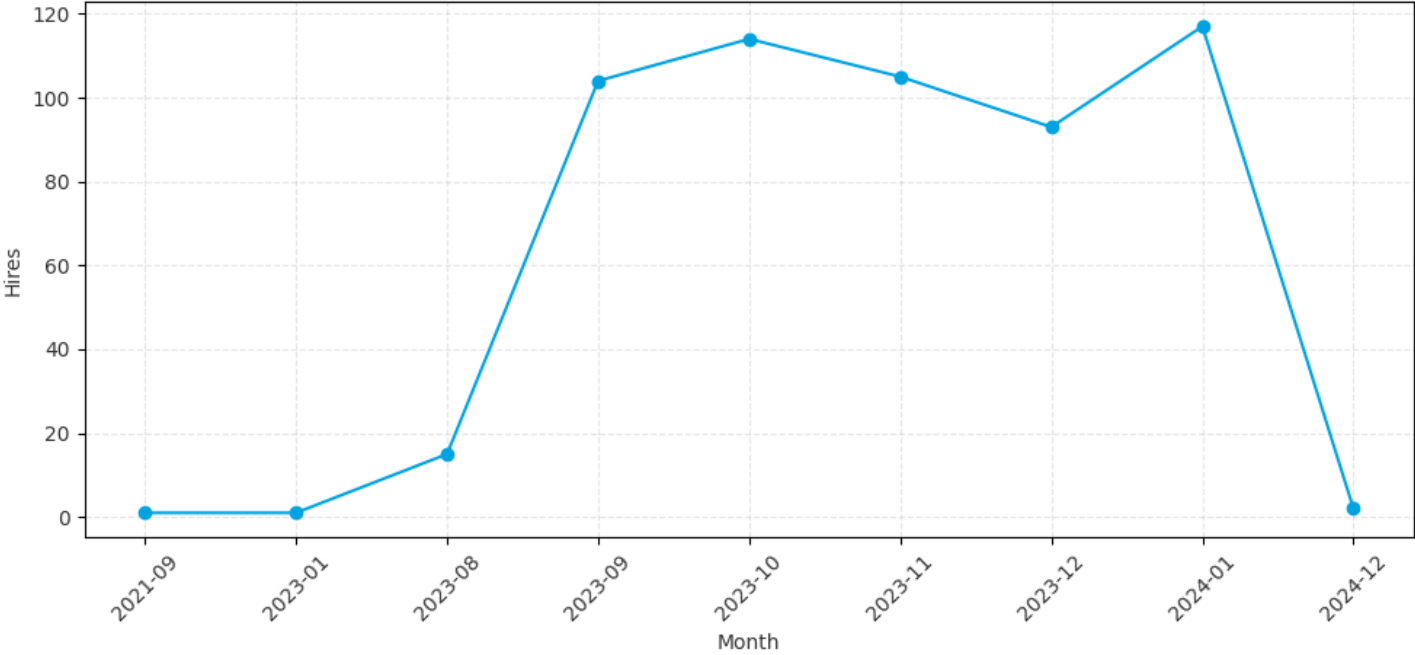
Top Rejection Reasons

Accepted vs Rejected Referrals

Rejected

27.3%

Accepted - Pending Hire
Pending
Closed

2.1%
1.0%
0.6%

69.0%

Accepted

Cogent Hire | Referral Funnel Snapshot