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

The purpose of tracking employee performance in Excel is to efficiently monitor and analyze individual and team productivity, set measurable goals, and assess progress over time. Excel allows for customizable performance metrics, visualizations like charts, and easy data comparison. It aids in making informed decisions about employee development, rewards, and performance improvement.

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
- ❑Filter – remove
- ❑Formula – performance
- ❑Pivot table – summary
- ❑Graph – data visualization
- ❑Slicer – particular type of employee data

Dataset Description

- **Employee Performance Analysis – kaggle**
- **26 – features**
- **12 – features used**

1. Employee ID
2. First name
3. Last name
4. Exit date
5. Business unit
6. Employee status
7. Employee type
8. Employee classification type
9. Gender code
10. Performance score
11. Current employee rating
12. 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	5	13	30	9	57	
CCDR	6	22	22	5	55	
EW	4	14	29	7	54	
MSC	4	12	41	2	59	
NEL	6	16	27	5	54	
PL	8	11	20	3	42	
PYZ	10	15	30	6	61	
SVG	10	13	23	7	53	
TNS	7	18	20	1	46	
WBL	12	11	28	2	53	
Grand Total	72	145	270	47	534	

EmployeeType

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

4. Performance level =IFS(Z8 >= 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 :
    =IFS(Z8 >= 5 , "VERY HIGH",Z8>=4,"HIGH", Z8 >= 3 , "MED",TRUE,"LOW")
  - This formula assumes that Performance score is the column header for performance scores.

4. Creating a Pivot Table :

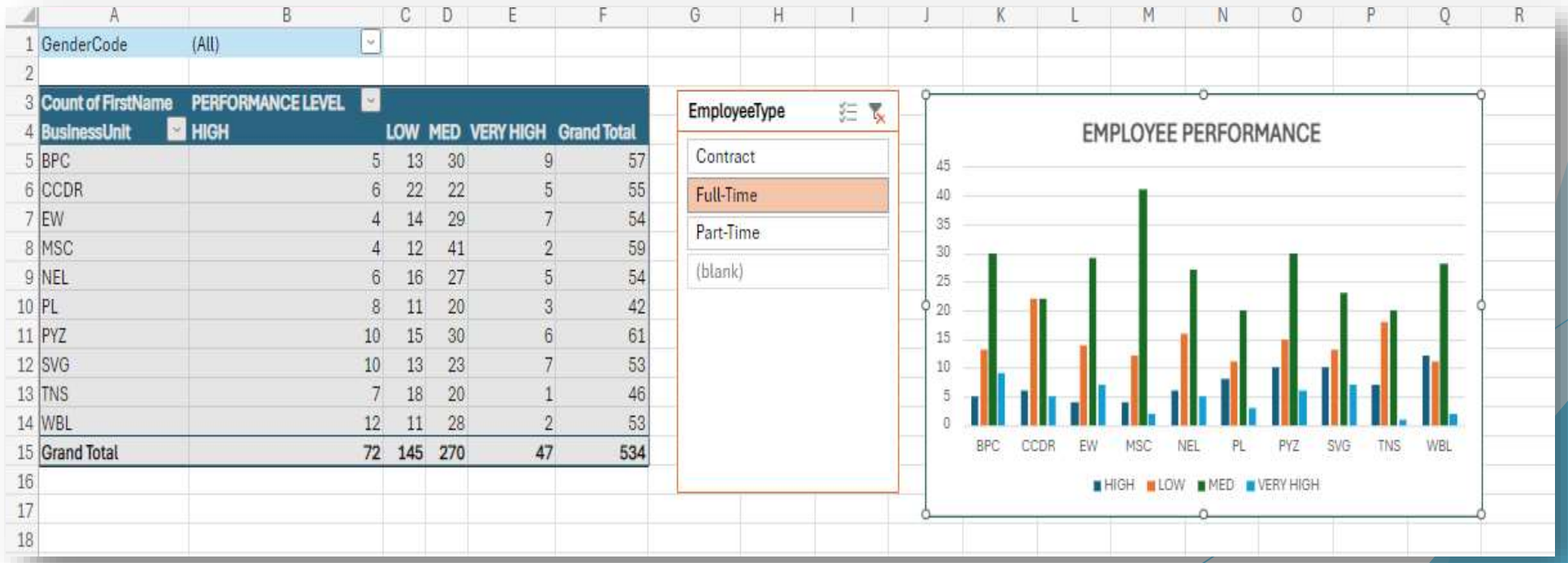
- **Insert Pivot Table:**
  - Select your entire dataset including the highlighted and newly added columns.
  - Go to Insert > PivotTable.
  - Choose where you want the Pivot Table to be placed.
- **Configure Pivot Table:**
  - Drag and drop relevant fields into the Rows, Columns, and Values areas as 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.

6. 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.



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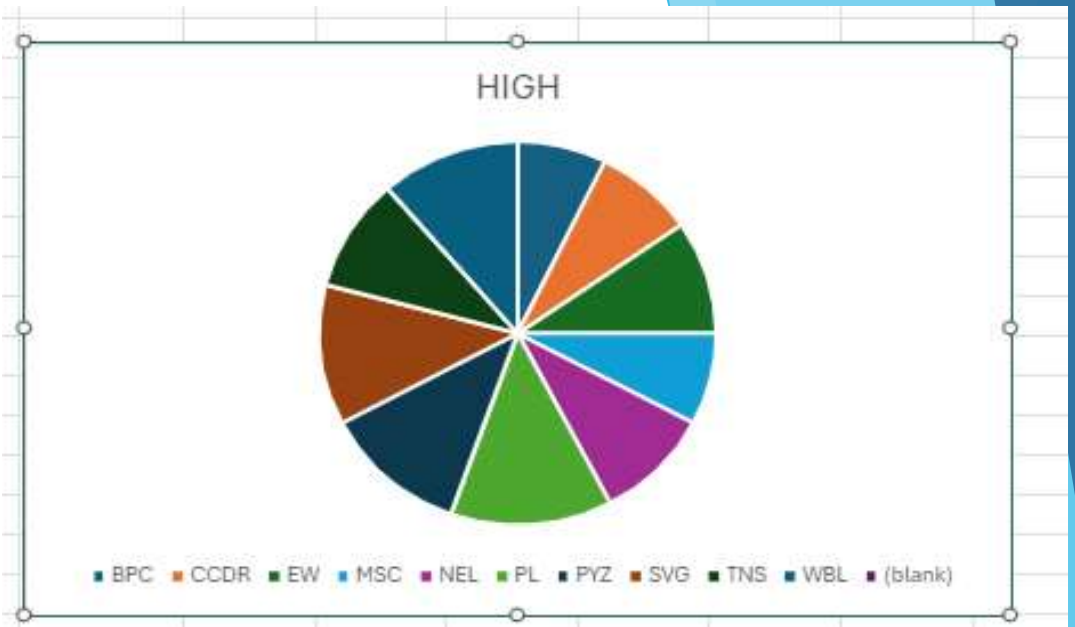
RESULTS


EMPLOYEE PERFORMANCE
100
90
80
70
60
50
40
30
20
10
0
BPC
CCDR
EW
MSC
NEL
PL
PYZ
SVG
TNS
WBL
(blank)
HIGH
LOW
MED
VERY HIGH
(blank)


HIGH
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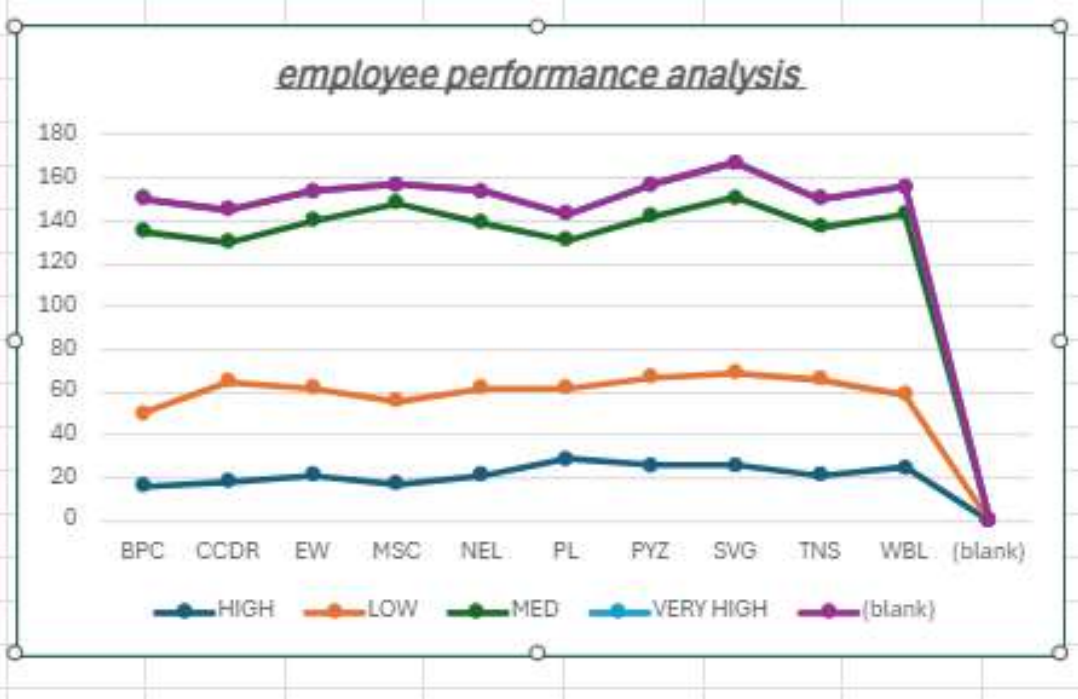
employee performance analysis
180
160
140
120
100
80
60
40
20
0
BPC
CCDR
EW
MSC
NEL
PL
PYZ
SVG
TNS
WBL
(blank)
HIGH
LOW
MED
VERY HIGH
(blank)

conclusion

In a firm, this project’s insights into employee performance and employment trends are valuable for strategic decision-making, such as identifying high performers and addressing performance gaps. The ability to dynamically filter and visualize data helps managers make informed decisions about staffing, training, and resource allocation. On a day-to-day basis, it aids in monitoring employee status, evaluating performance, and planning interventions, ultimately improving organizational efficiency and effectiveness.