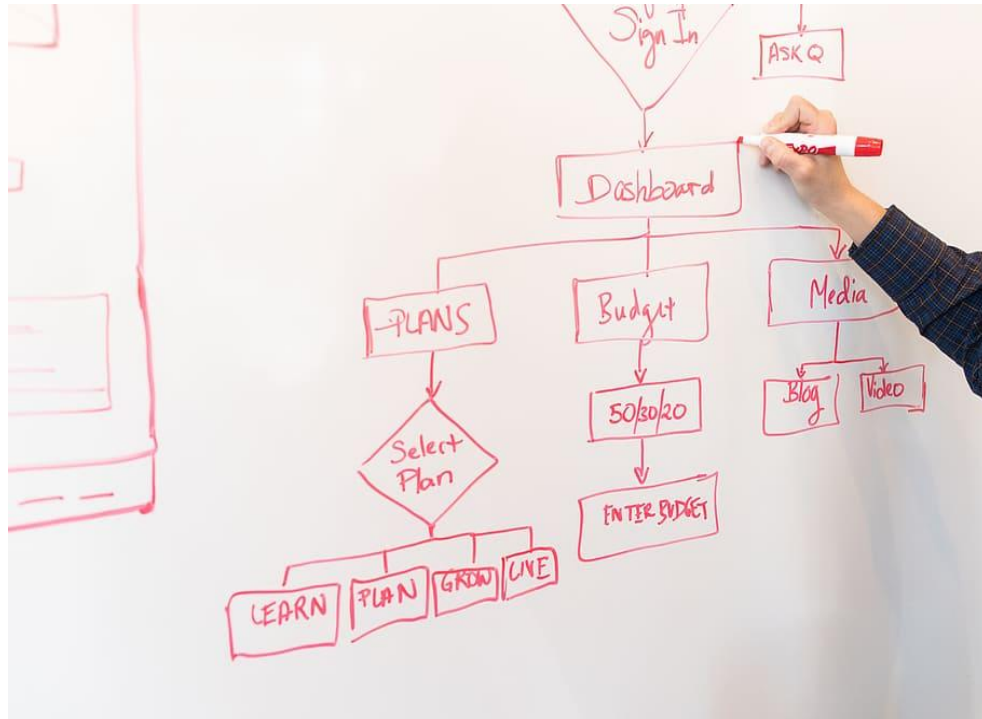# Tableau HR Scorecard Project

GOVERNMENT ARTS COLLEGE, DHARMAPURI
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1. Introduction

Project Overview

Our Tableau HR Scorecard project is designed to revolutionize the way we approach talent management within our organization. Through data-driven insights and interactive dashboards, we aim to enhance our HR strategies, ultimately contributing to our organization's success.

Objectives
- Measure and evaluate the success of talent management strategies.
- Provide HR professionals and business leaders with actionable insights.
- Enhance decision-making related to workforce planning, recruitment, retention, and development.

2. Problem Definition & Design Thinking

Understanding Stakeholder Needs

Our journey began with a focus on understanding the needs and perspectives of our stakeholders, primarily HR professionals and business leaders. We employed the following methods:

Empathy Mapping

Thinks:We captured their thoughts regarding HR initiatives' alignment with business goals and concerns about the financial impact of turnover and recruitment costs.

Says: Their discussions revolved around improving employee engagement, efficient recruitment, and the measurement of HR efforts.

Does: Stakeholders participated in meetings, data reviews, and collaborated with the HR team.

Feels: Their emotions ranged from anxiety about HR initiatives to confidence in investing in talent management.

Says

- I need customizable views for different stakeholders.
- I wish I could identify trends and anomalies quickly.
- I need accurate and up-to-date expense data for analysis.
- I want to find cost-saving opportunities
- It takes a lot of time to manually compile reports.
- It's challenging to track expenses across various departments.
- I struggle to communicate insights effectively to management.

Thinks

- How do other companies manage their expense analysis?
- Can I identify any patterns in irregular expense spikes?
- I wonder if I'm missing out on potential cost optimizations.
- Is there a correlation between certain expenses and revenue?
- What tools can streamline the integration of data from different sources?
- Are there tools that can help me forecast future expenses?
- How can I present complex expense data in a visually appealing way?

Financial Analyst

Helps companies in decisions using market trends, finances, and deal predictions.

Does

- Attends meetings to discuss expense trends with the finance team.
- Collaborates with department heads to understand spending patterns.
- Experiments with different visualization tools to improve reporting.
- Uses spreadsheet software for manual data entry and analysis.
- Compiles expense reports from different sources.
- Conducts variance analysis to compare budgeted vs. actual expenses.
- Manually creates charts and graphs to visualize data.

Feels

- Frustration due to time-consuming manual tasks.
- Anxious about presenting accurate financial insights.
- Satisfied when insights lead to actionable recommendations.
- Overwhelmed by the volume of expense data to analyze.
- Excitement when identifying cost-saving opportunities.
- Empowered when using tools that streamline analysis processes.
- Curious about discovering hidden trends in the data.

Idea Generation and Prioritization

We facilitated brainstorming sessions to generate ideas for our Tableau HR Scorecard:

Financial Perspective Dashboard: Prioritized highly to quantify financial impacts.
Employee Engagement Dashboard: Addressed to enhance job satisfaction and retention.

Recruitment Efficiency Dashboard: Crucial for workforce planning and efficient HR processes.

Learning and Development Dashboard: Focused on employee growth for long-term success.

Manager Satisfaction Dashboard: Acknowledged to strengthen HR-manager interactions.

Turnover Analysis Dashboard: Addressed to reduce attrition challenges.

Onboarding Effectiveness Dashboard: Critical for a smoother employee onboarding experience.

Compensation and Benefits Overview: Lower priority, as financial data covered in other dashboards.

Innovation and Adaptation Dashboard: Lower priority, as it relates to long-term objectives.

Candidate Experience Dashboard: Important but not immediate concern.
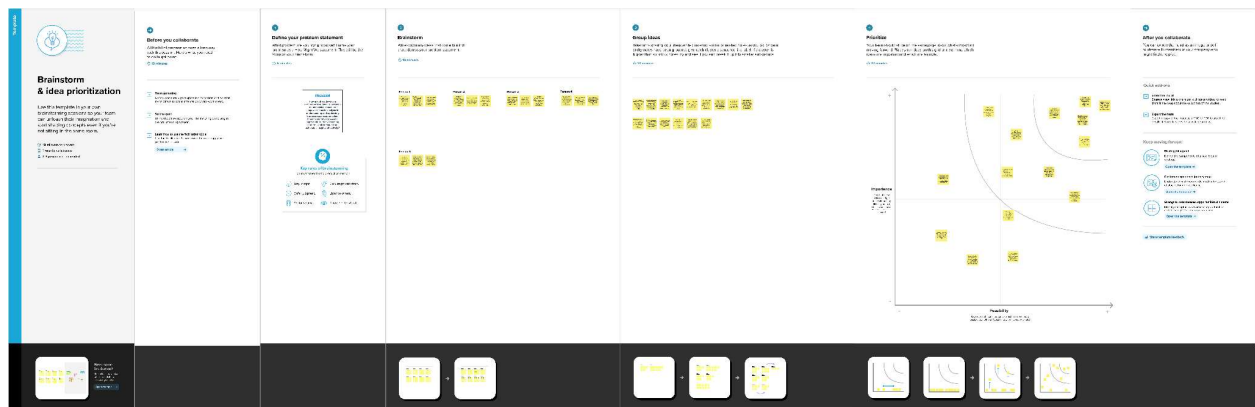
3. Data Collection and Preparation

Data Sources

The dataset for this project was provided by our mentor, ensuring it aligns with our project's goals and objectives. It contains comprehensive HR-related information that forms the foundation of our analysis.

Data Cleaning and Transformation

Preparing the data involved several crucial steps to ensure accuracy and relevance. We leveraged multiple options available in Tableau to clean and shape the data:

Data Linking to Tableau

Tableau provides various options for connecting to data sources, including databases, files, web connectors, and more. For our project, we utilized the following steps to link our prepared data to Tableau:

1. Data Connection:
   ● We selected the appropriate data connection option based on the format of our dataset, in our case, an Excel file.

2. Data Import:
   ● We imported our cleaned and transformed dataset into Tableau, ensuring all tables and fields were correctly recognized.

3. Data Source Setup:
   ● We configured the data source settings, including data types, relationships, and calculated fields, to prepare it for analysis.
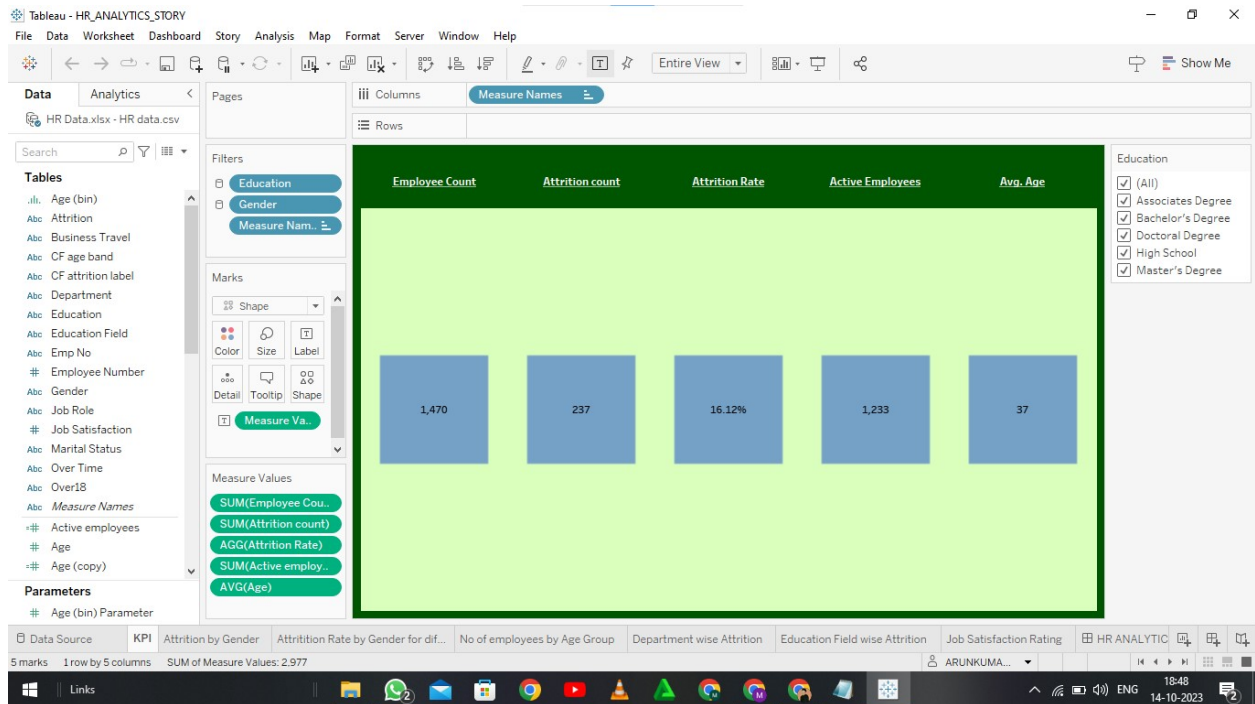
4. Data Integration:
   ● We integrated our data source seamlessly with the Tableau project, allowing for real-time updates and synchronization.

4. Dashboard and Story Creation

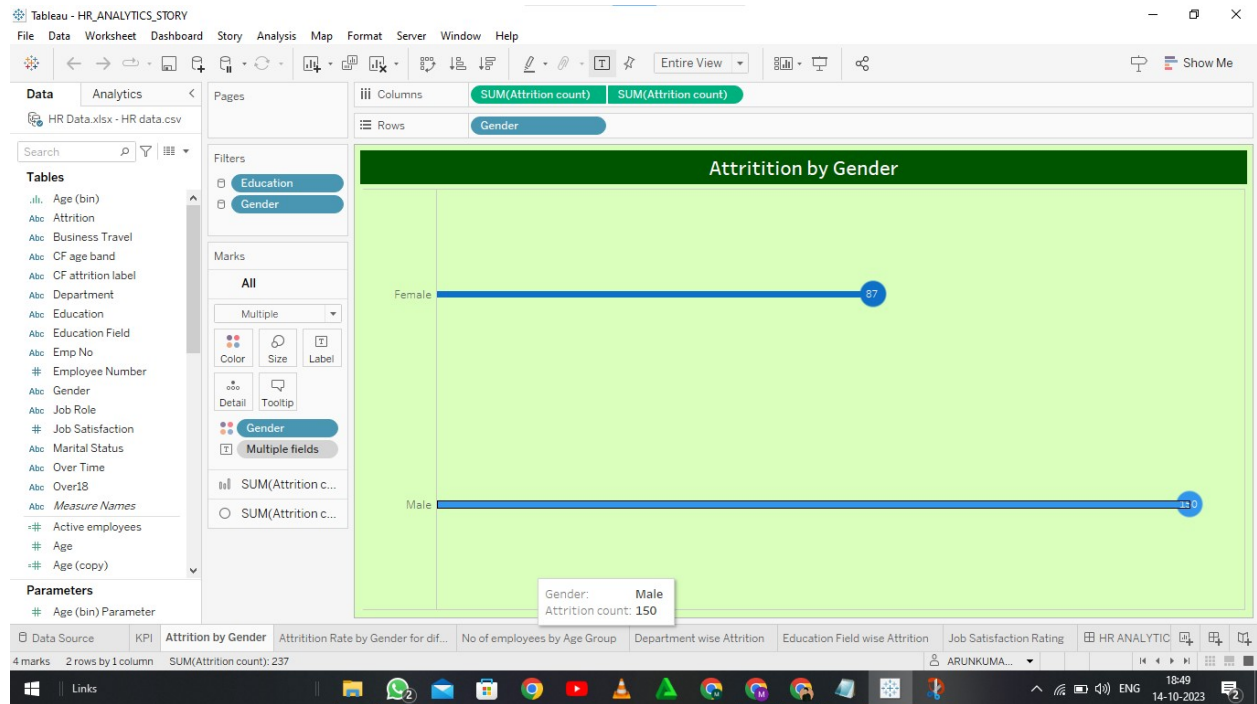**Worksheet 1: Workforce Overview Dashboard**

This dashboard aims to provide an overview of our workforce, including engagement, attrition rates, and workforce averages.
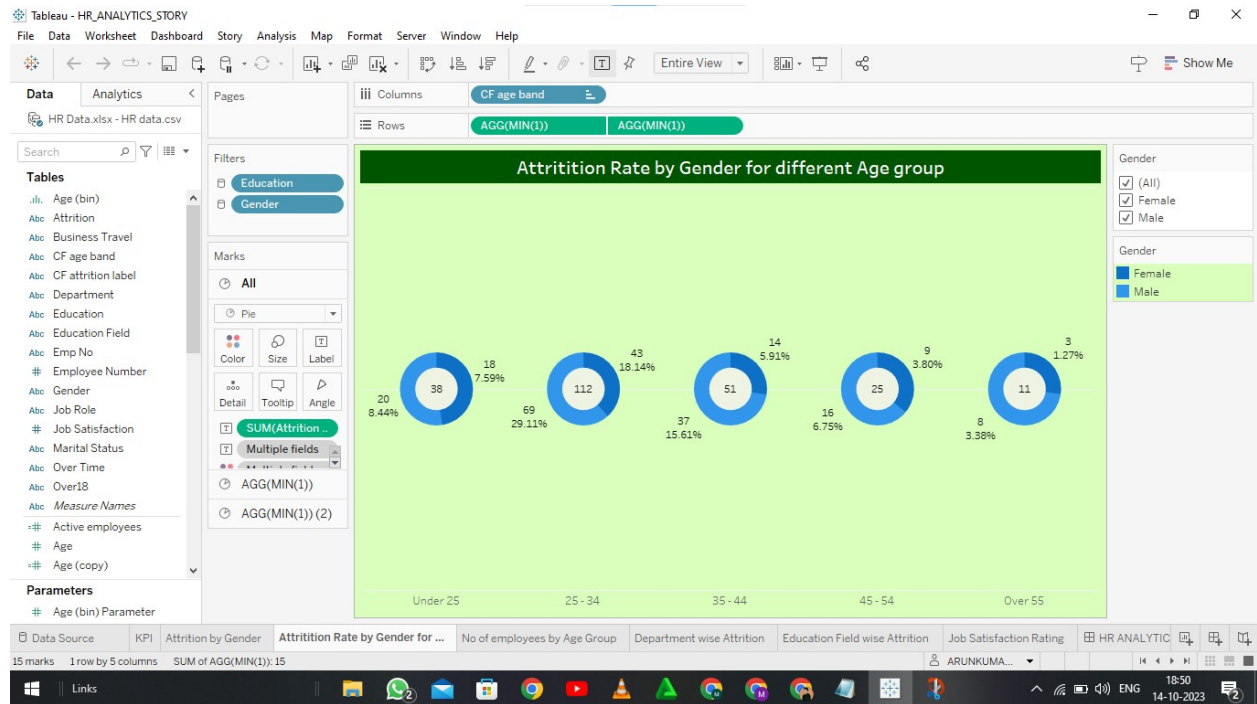
Worksheet 2: Gender-Based Attrition Dashboard

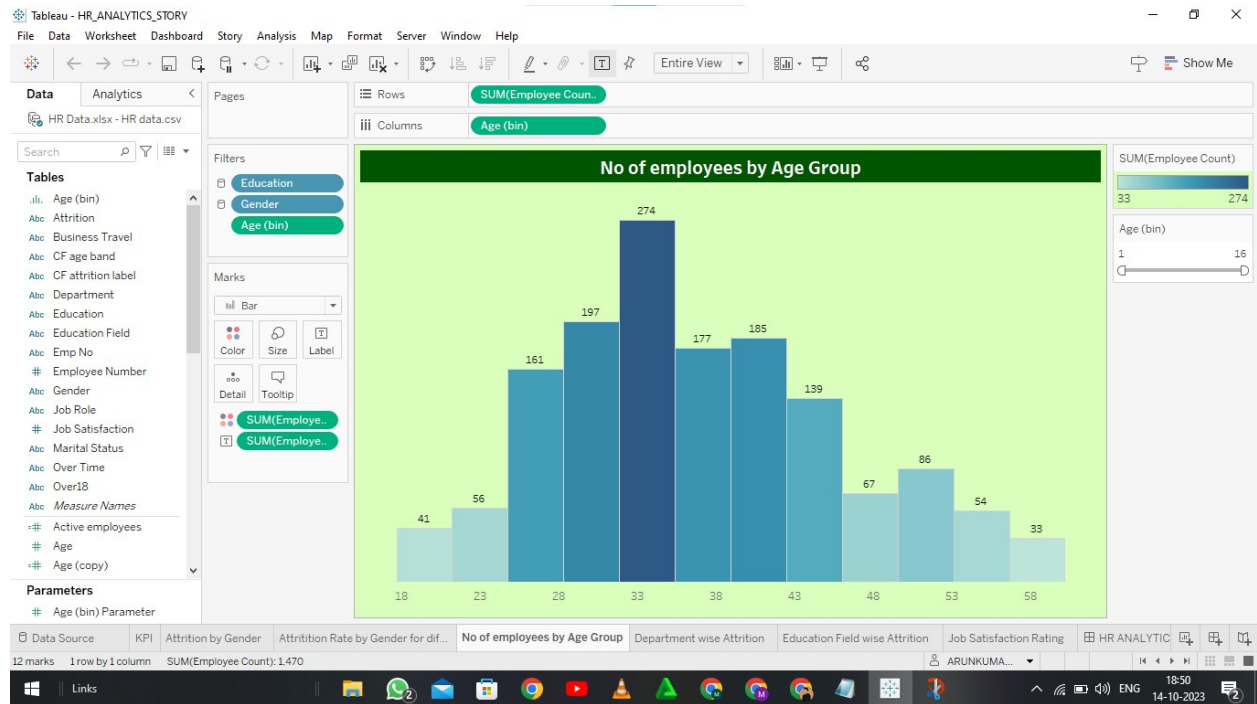Focuses on gender-based attrition, highlighting male and female departures.

Worksheet 3: Age-Related Attrition Dashboard
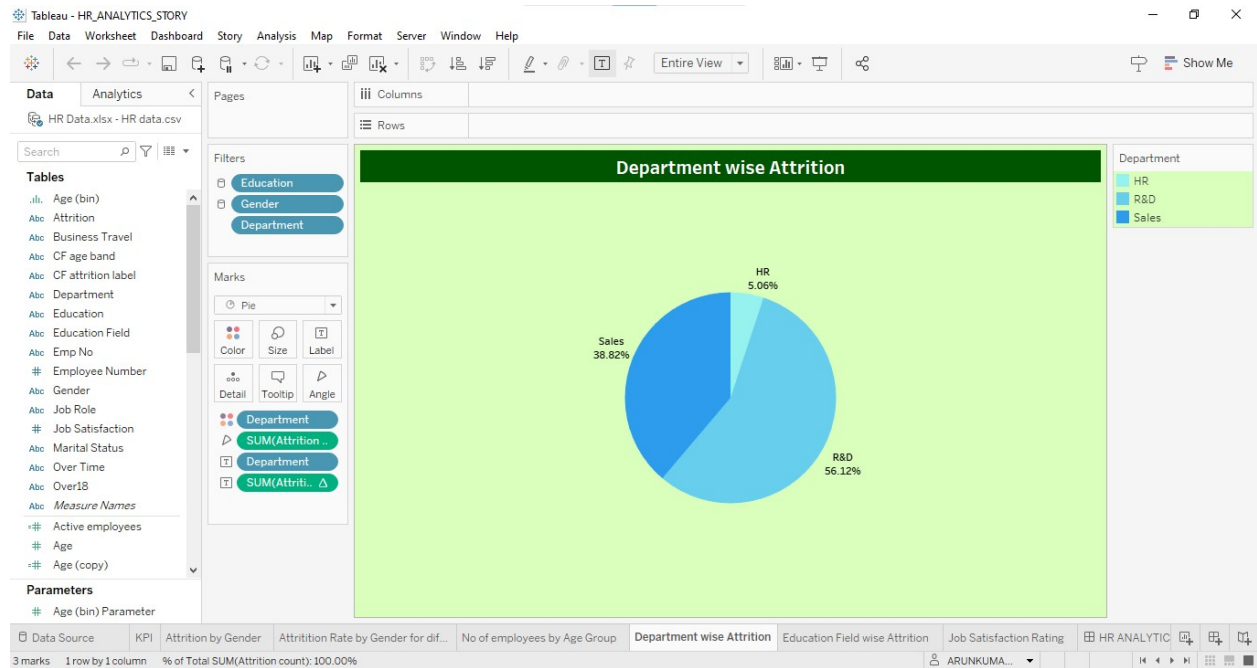Analyzes attrition rates across different age groups.

Worksheet 4: Age Distribution Dashboard

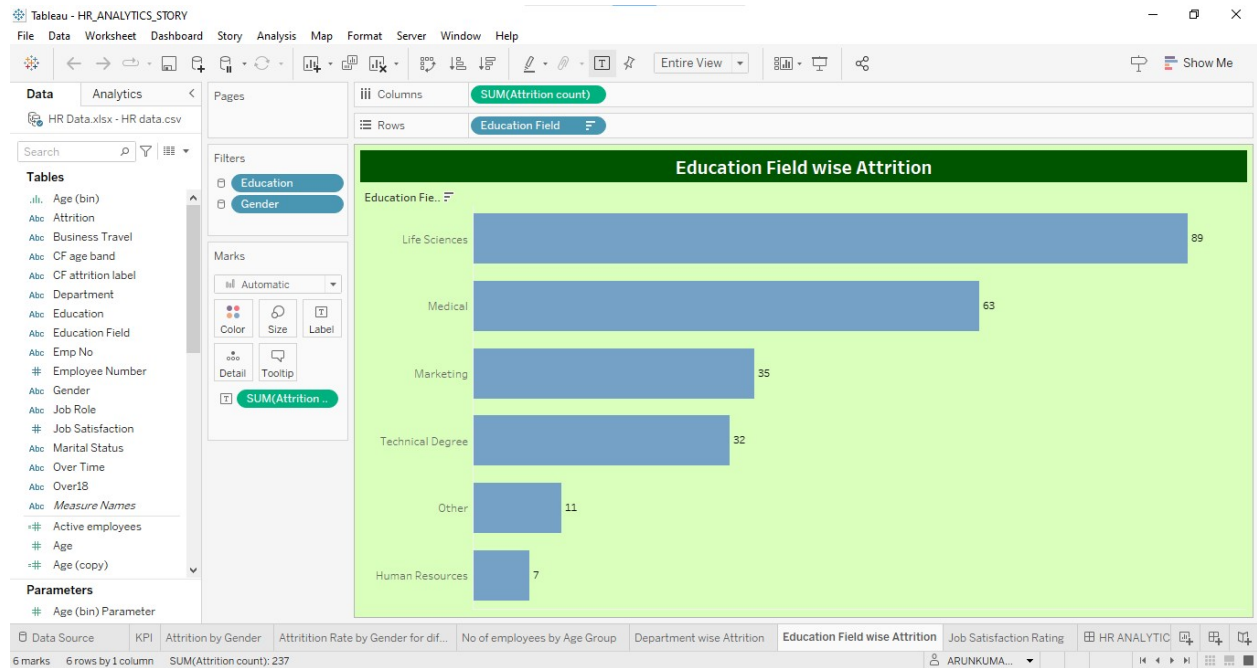Explores employee age distribution within the organization.

Worksheet 5: Departmental Attrition Dashboard

Examines attrition by department, identifying areas that require attention.

Worksheet 6: Educational Background Analysis Dashboard
Explores attrition trends based on educational backgrounds.

Worksheet 7: Job Satisfaction Dashboard

Gauges job satisfaction levels among employees, with a focus on specific job categories.

Job Role	1	2	3	4	Grand Total
Healthcare Representative	26	19	43	43	131
Human Resources	10	16	13	13	52
Laboratory Technician	56	48	75	80	259
Manager	21	21	27	33	102
Manufacturing Director	26	32	49	38	145
Research Director	15	16	27	22	80
Research Scientist	54	53	90	95	292
Sales Executive	69	54	91	112	326
Sales Representative	12	21	27	23	83
Grand Total	289	280	442	459	1,470
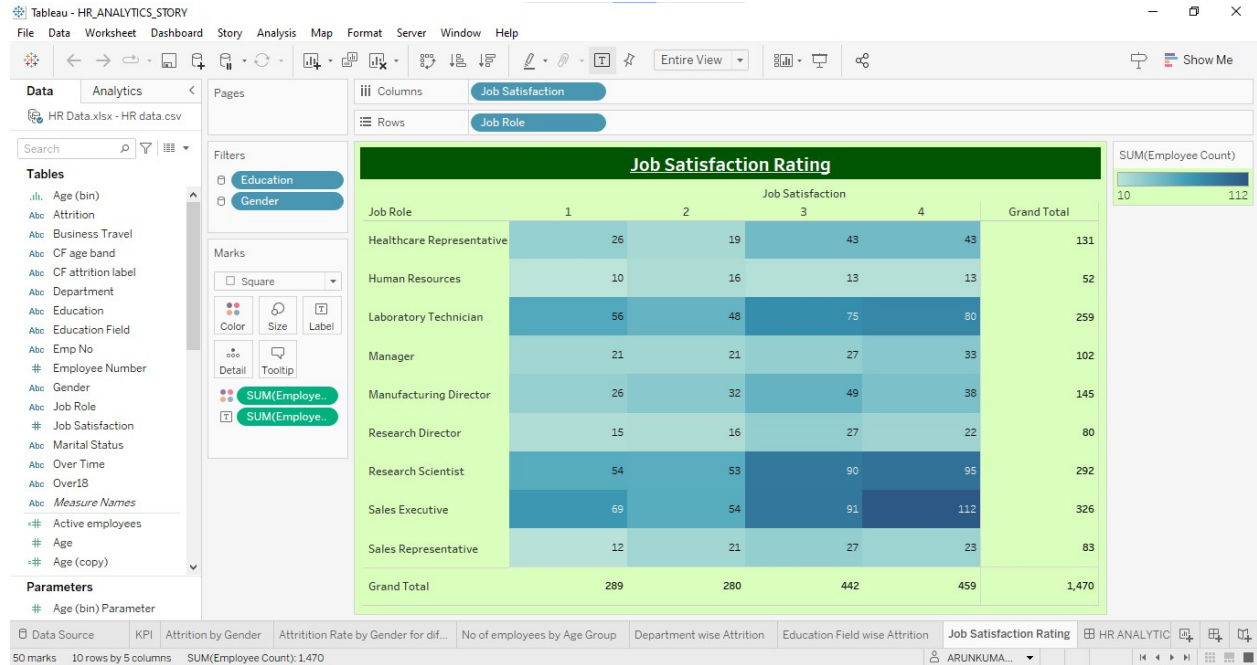
The HR Analysis Dashboard

- **Objective:** This master dashboard combines insights from all seven worksheets, providing a holistic view of talent management.
- **Visual Elements:** Integrated elements from all worksheets into a single interactive dashboard.
- **Interactivity:** Implemented cross-filtering and highlighting actions for seamless navigation.

HR ANALYTICS DASHBOARD

Education: All

| Employee Count	Attrition count	Attrition Rate	Active Employees	Avg. Age
1,470	237	16.12%	1,233	37

Attrition by Gender

Female 87
Male 150

Attrition Rate by Gender for different Age group

Under 25	25 - 34	35 - 44	45 - 54	Over 55
18 7.59%	43 18.14%	14 5.91%	9 3.80%	3 1.27%
38	112	51	25	11
20 8.44% / 69 29.11%		37 15.61%	16 6.75%	8 3.38%

No of employees by Age Group

18	23	28	33	38	43	48	53	58
41	56	161	197	274	177	185	139	67	86	54	33

Department wise Attrition

- HR 5.06%
- Sales 38.82%
- R&D 56.12%

Education Field wise Attrition

Education Field	
Life Sciences	89
Medical	63
Marketing	35
Technical Degree	32
Other	11
Human Resources	7

Job Satisfaction Rating

Job Role	1	2	3	4	Grand T..
Healthcare ..	26	19	43	43	131
Human Res..	10	16	13	13	52
Laboratory ..	56	48	75	80	259
Manager	21	21	27	33	102
Manufactur..	26	32	49	38	145
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Grand Total	289	280	442	459	1,470

Storytelling in Tableau

- We leveraged Tableau's storytelling feature to create a narrative that guides users through our HR Scorecard project.
- Our story highlights the significance of each perspective, emphasizing key findings and their implications for talent management strategies.
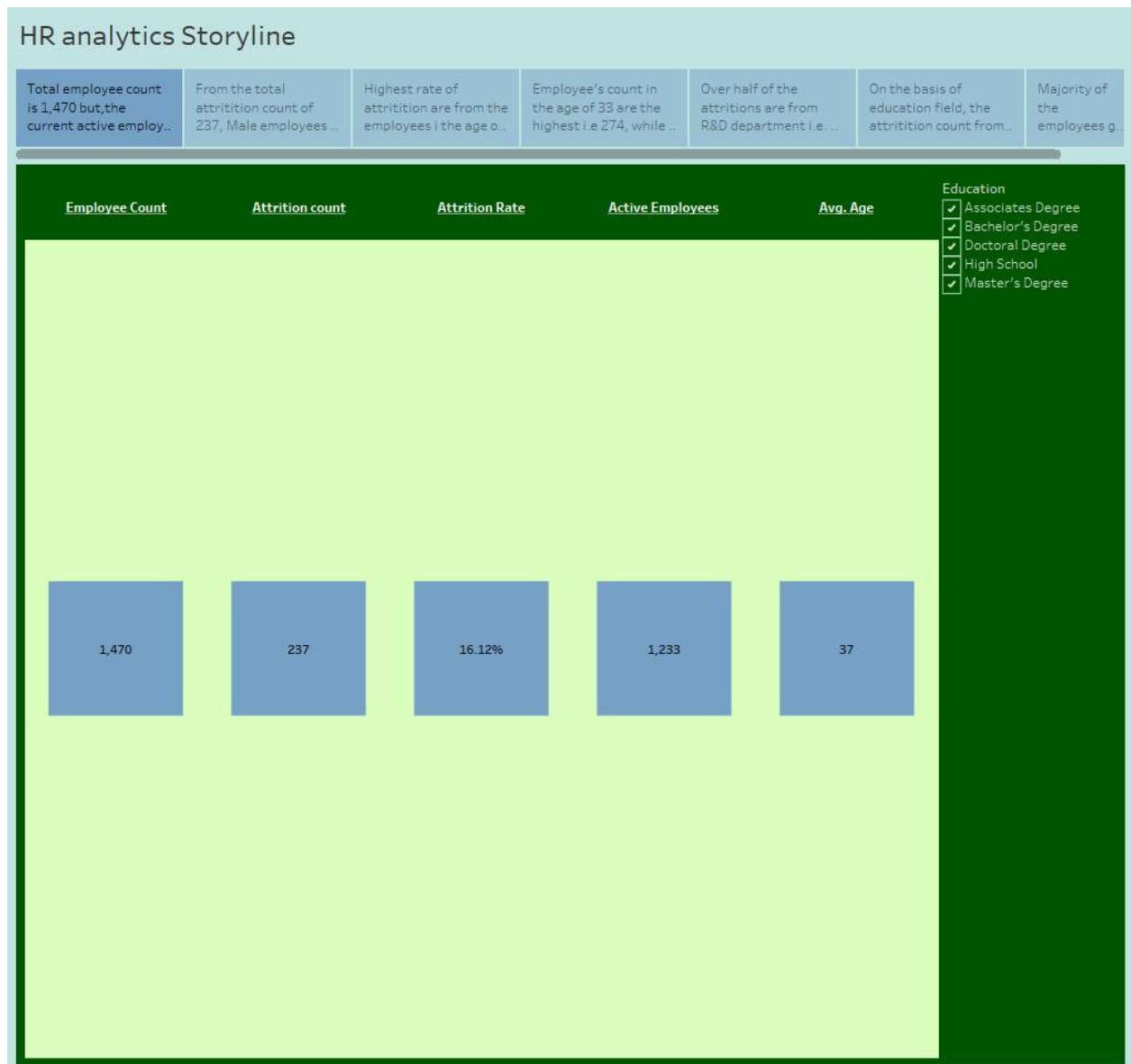
7. Publishing and Sharing

Publishing on Tableau Public

Objective: To make our findings accessible to a wider audience, we published the HR Analysis Dashboard on Tableau Public under my account.

Process:
- We selected the "Tableau Public" option under "Server" to publish our dashboard.
- After providing login credentials, we chose a name and description for the project.
- Privacy settings were configured to make the project publicly accessible.
- The HR Analysis Dashboard was then uploaded to Tableau Public.

Accessibility

Public Access: By publishing on Tableau Public, we ensured that our HR Analysis Dashboard could be accessed by anyone with an internet connection.

8. Project Conclusion

Achievements and Goals Met
Objective Fulfillment : We successfully achieved the objectives set at the project's outset:

- The creation of a comprehensive HR Scorecard to measure and evaluate talent management strategies.
- Providing actionable insights for HR professionals and business leaders.
- Enhancing decision-making related to workforce planning, recruitment, retention, and development.

Data-Driven Decisions: Our project has empowered our organization to make data-driven decisions regarding HR initiatives.

9. Appendices

- DASHBOARD :
  https://public.tableau.com/views/HR_ANALYTICS_DASHBOARD_16969802662060/HRANALYTICSDASHBOARD?:language=en-US&publish=yes&:display_count=n&:origin=viz_share_link

- STORY :
  https://public.tableau.com/views/HR_ANALYTICS_STORY/HRanalyticsStoryline?:language=en-US&publish=yes&:display_count=n&:origin=viz_share_link

- DEMONSTRATION VIDEO : https://youtu.be/lrn8YlKitZU?si=PbTPyLsLn27w8fHU