



## Transformation Project

Team: Jarvis

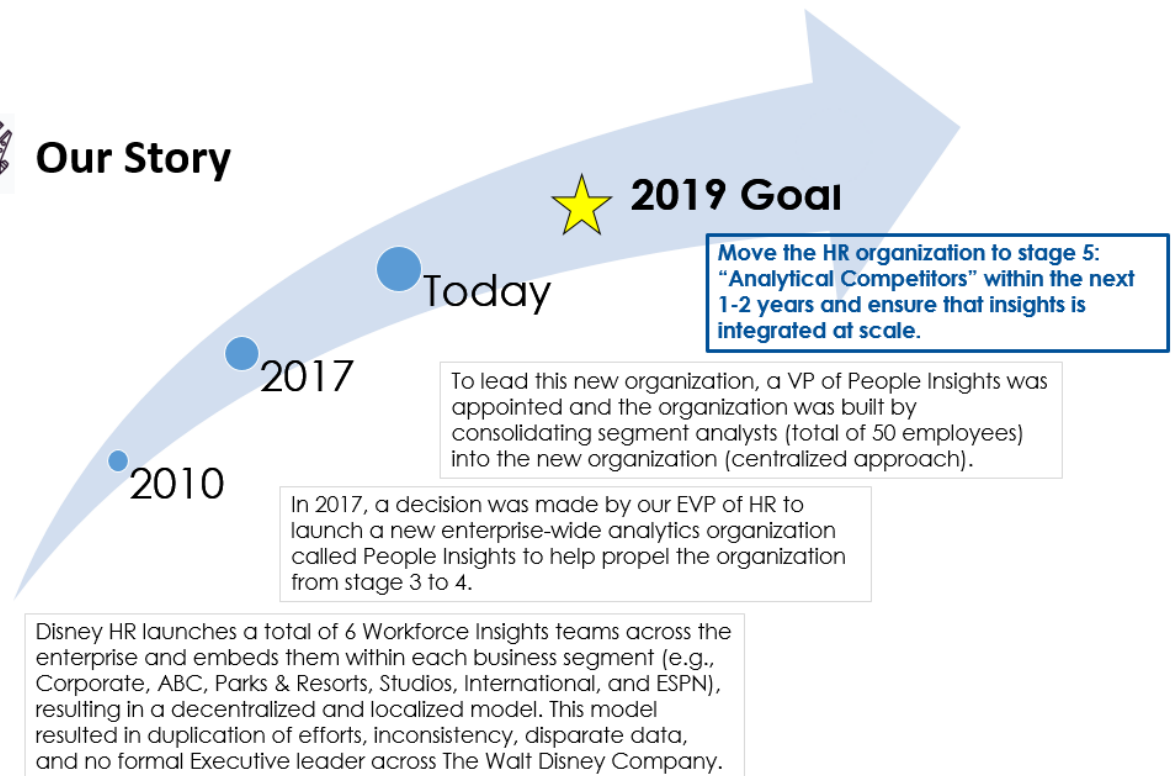
Team Members: Brent Young, Calvin Ng, Brad Franklin, Chris Woods

MSDS 480 Section #: 56

Quarter: Fall 2018



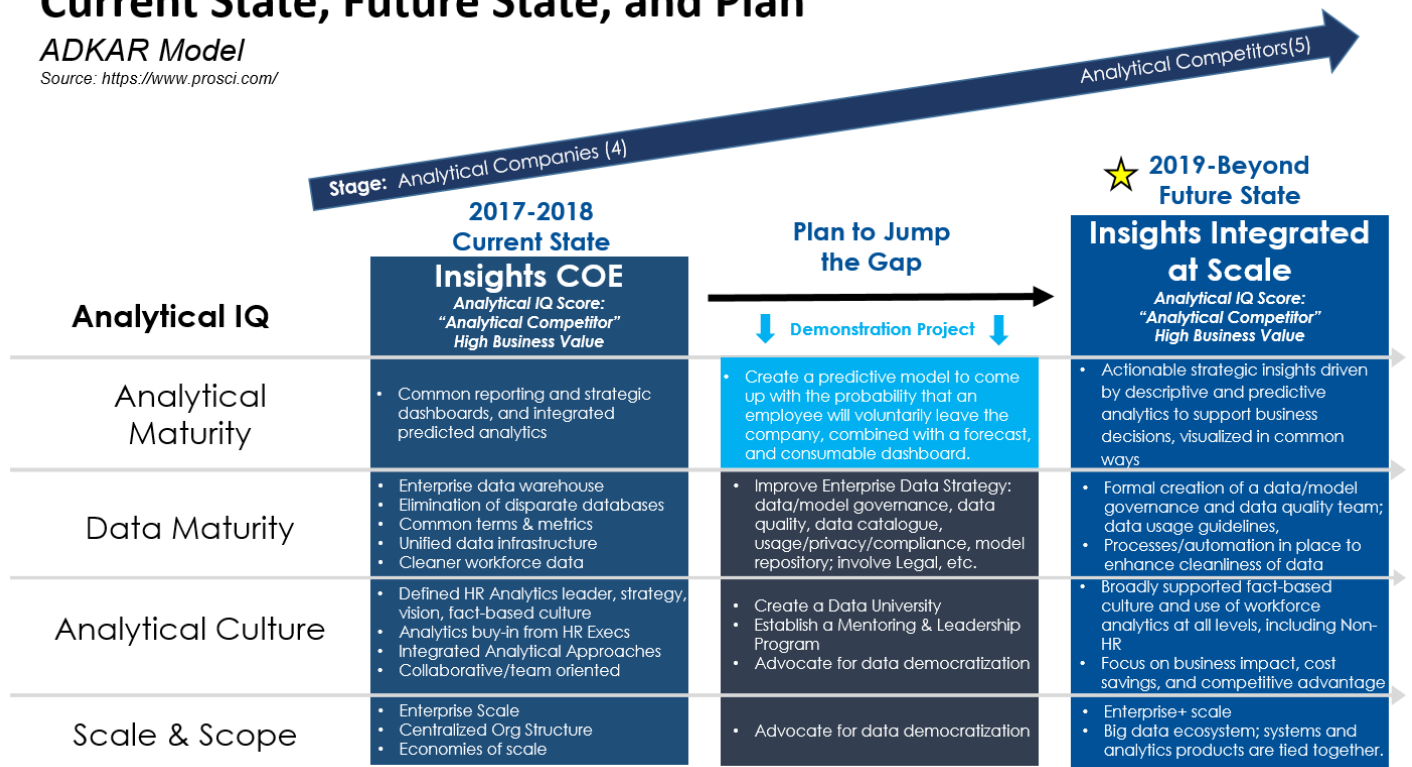
## Our Story



## Current State, Future State, and Plan

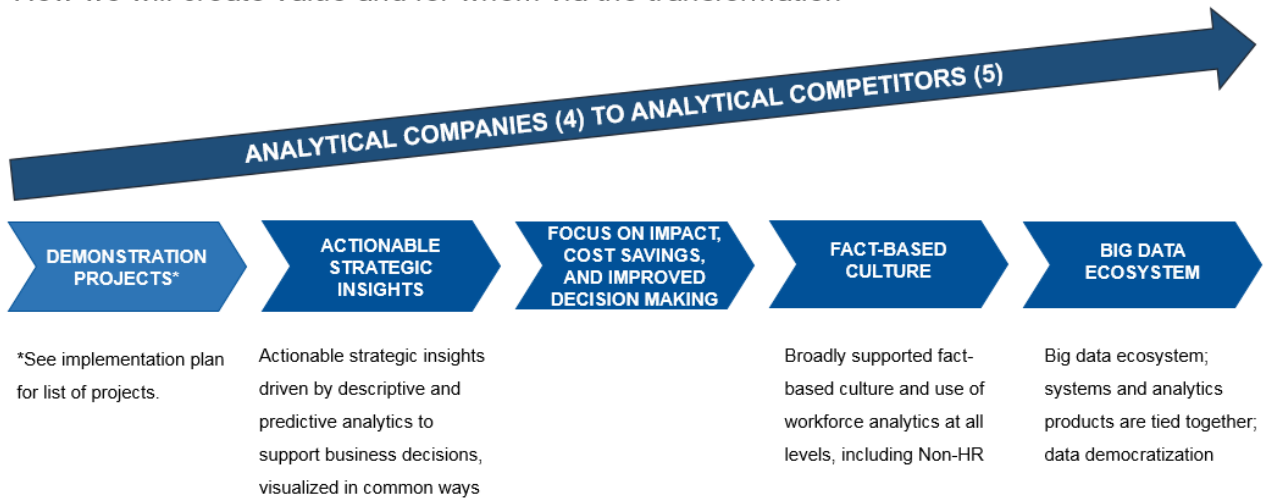
### ADKAR Model

Source: <https://www.prosci.com/>



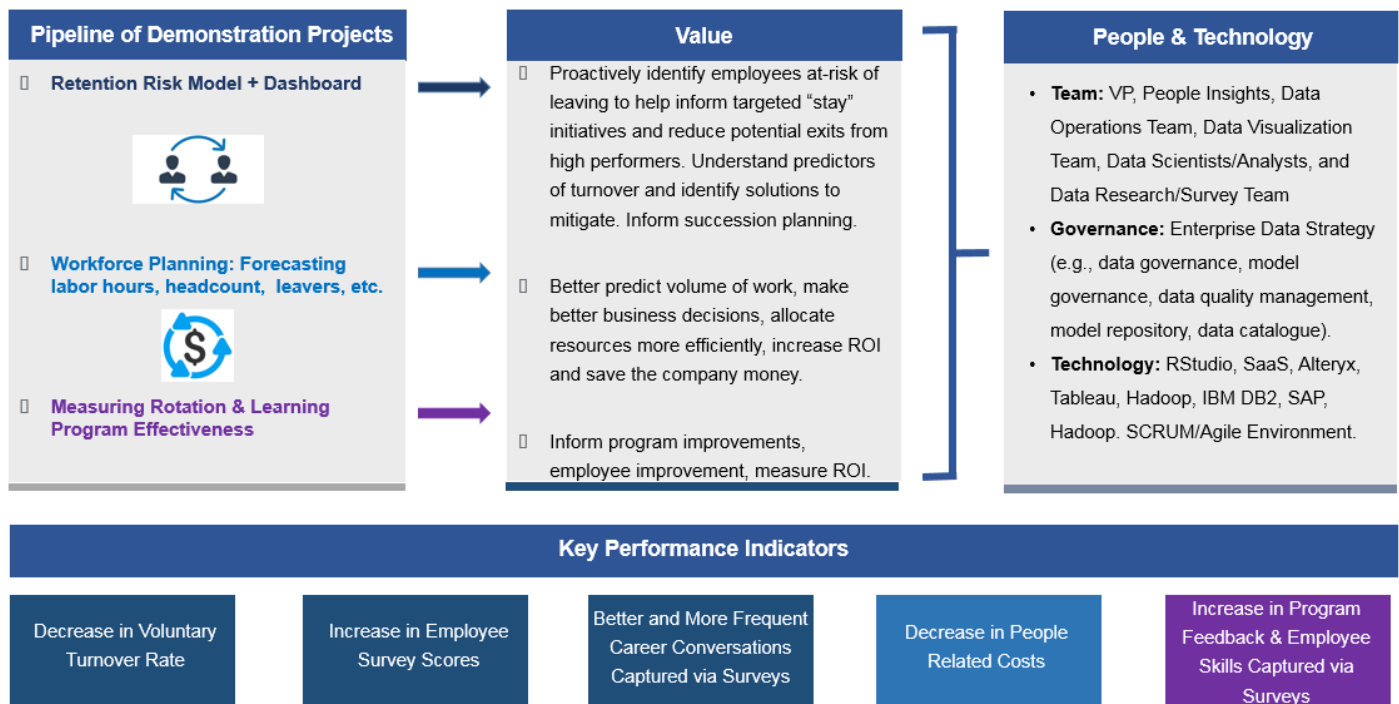
## Analytics Gap and Strategy

How we will create value and for whom via the transformation

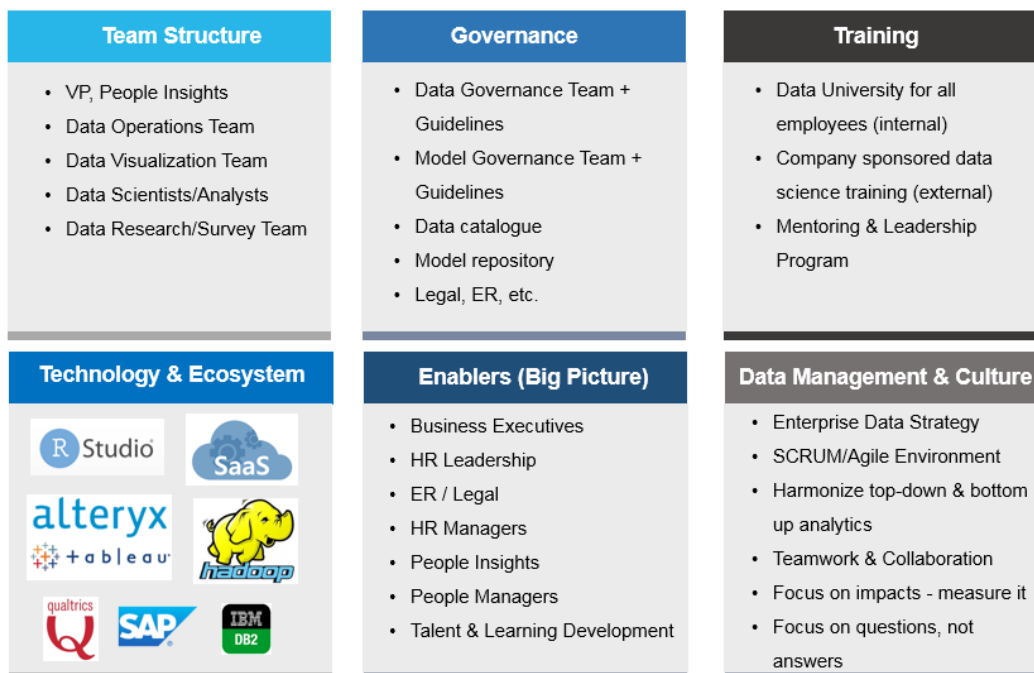


**TARGET AUDIENCE: PEOPLE MANAGERS & HUMAN RESOURCES**

## Implementation Plan: Application Projects



## Implementation Plan: People and Infrastructure Challenges



## Top Three Risks and Mitigation Strategies



### 1. Technology: Data security risks & integrity concerns

The more people that have access to data, the greater the security risk and the potential for data integrity concerns. As a result, the importance of establishing a strong data governance taskforce/strategy and enforcing strict data usage guidelines are crucial.



### 2. People: Misinterpretation of the data by non-technical people

It's very easy to mistake correlation for causation and misleading patterns/interpretation of the data. As a result, people managers and non-technical human resources professional will need to receive the proper training on how to best use the data to drive company initiatives and goals.



### 3. Internal Process: Culture & data privacy concerns

Using employee data and models to make strategic employee and business related decisions can pose concerns from employees in the company. As a result, being transparent, communicating appropriately, using good change management, and involving Legal, compliance, ER, is vital.




## Demonstration Project Revisited

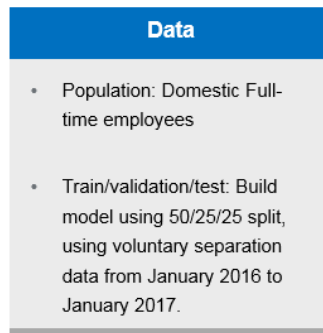
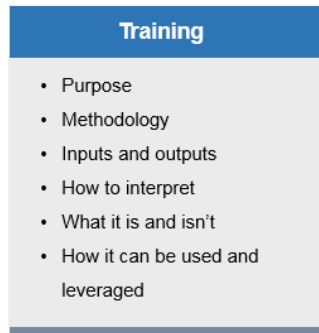
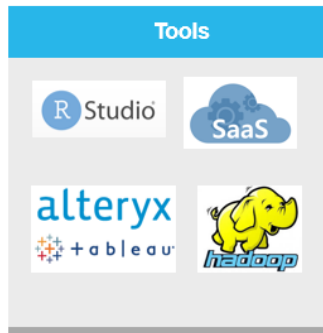
<sup>^</sup>Given that the average salary in a given company is \$50,000 and the cost of turnover is 150% of salary = **\$75,000 per departing employee.**

**Start-up Costs:** We will invest \$1.5 million in people, technology, and data over the next 6 months.

**Overall Level of Cost Avoidance:** Est. Avg. Turnover Cost Per Employee is \$75,000<sup>^</sup> \* 325 Avg. Vol. Exits Per Year \* 20% Reduction = **\$4.9 million in savings**

Retention Risk Model +Dashboard	System	Value
<ul style="list-style-type: none"> <li><b>Objective:</b> Create a predictive model to come up with the probability that an employee will voluntarily leave the company within the next year, combined with a forecast on number of leavers that is consumable for end-user via a dashboard.</li> <li><b>Variables:</b> Demographic, Compensation, Career/Performance, Work Environment; external: Greatest Companies to Work For (Fortune)</li> </ul>	<ul style="list-style-type: none"> <li><b>Employee System of Records:</b> SAP</li> <li><b>Database:</b> IBM DB2</li> </ul> 	<ul style="list-style-type: none"> <li>Proactively identify employees at-risk of leaving to help inform targeted "stay" initiatives (e.g., stay discussions, L&amp;D courses, mentoring programs, career conversations) and reduce potential exits from high performers.</li> <li>Understand predictors of turnover and identify solutions to mitigate; help people managers proactively plan and allocate resources efficiently.</li> <li>Inform talent and succession planning.</li> </ul>
Key Performance Indicators		
Target Adoption Rate by People Managers: >50%	Decrease in Voluntary Turnover Rate	Increase in Employee Survey Scores
		Better and More Frequent Career Conversations Captured via Surveys
		Increase in L&D Course Enrollment & Post-Course Feedback

## Setting the Stage

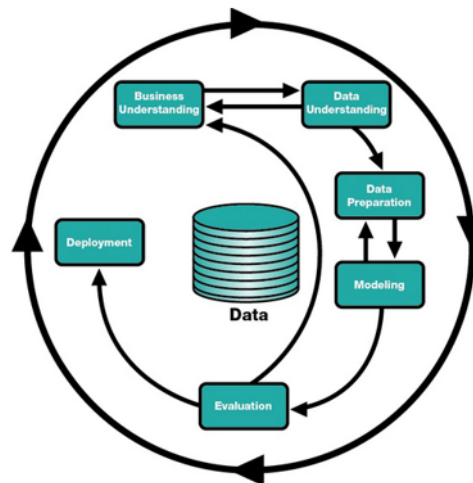


\*See description for variables

## Scrum + CRISP-DM Development Process and Plan

**Tasks/Deliverable**

- Introduction with stakeholders (Goal, value, what we are trying to accomplish, etc.)
- Set-up weekly meetings to ideate on weekly improvements
- Brainstorm what variables we want to include
- Finalize population criteria
- Set-up infrastructure and obtain data



**Resources (SCRUM Roles)**

- Analyst
- Dashboard Designer
- Data Operations
- SCRUM Master

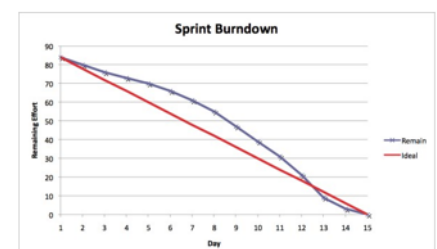
**Target Delivery Date**

- 3-4 Week Sprint
- Target Date: 11/30/18

### Sprint Backlog

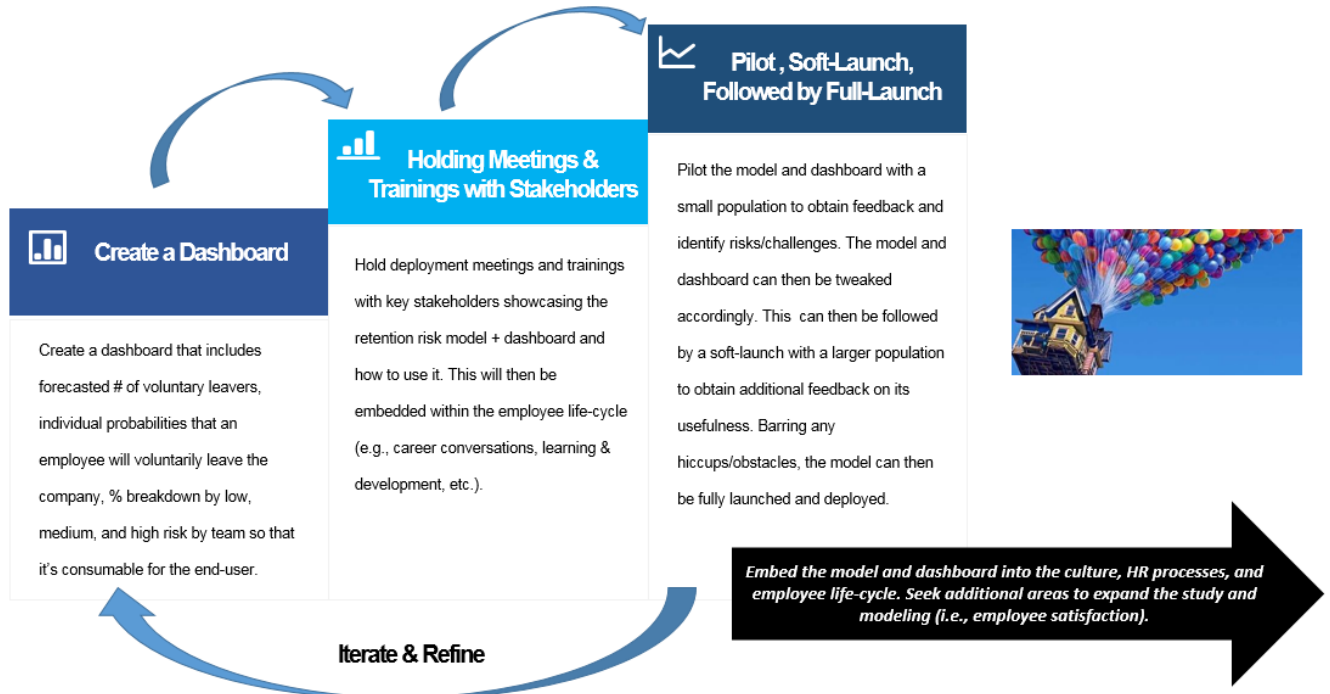
Retention Risk Model + Dashboard						
Spring Backlog						
Sprint Description	Responsible	Actual Hours	Remaining Hours	Defined	In-Progress	Tested
Kick-Off Meeting w/Stakeholders	VP People Insights	4		X		
Finalize Population Criteria	VP, Analyst, SCRUM Master, Data Operations	2		X		
Finalize variables	VP, Analyst, SCRUM Master, Data Operations	2		X		
Conduct Exploratory Data Analysis	Analyst, Dashboard Designer	40		X		

### Sprint Burndown Chart

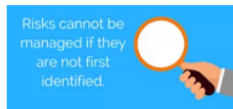



## Deployment


Here's how deployment is included in our sprint and how the first full release will be deployed:



## Risks to be Managed



 Risks to be Managed
<ul style="list-style-type: none"> <li>Protected categories (e.g., demographics). Do we share the variables that's included in the model?</li> <li>Employee experience (level of trust between employee and leader)</li> <li>Employee Relations risk (e.g., equal opportunity for advancement or career opportunities)</li> <li>How granular do we want to be? What's our communication approach?</li> <li>Regulatory Risk (e.g., model bias)</li> </ul>

 Ideas on How to Address It
<ul style="list-style-type: none"> <li>Be transparent. Leaders and employees should have access to the same level of detail and information. Involve Legal.</li> <li>Provide education about the model (purpose, what it is and isn't).</li> <li>Provide questions for leaders to think about to help facilitate the conversation.</li> <li>Utilize a cascade approach. Leader meets with his/her leadership team. Leadership team then meets with his/her directs and so forth.</li> <li>Obtain Legal/Compliance approval.</li> </ul>





## Sample Team Profile: XYZ Organization

Forecasted number of employees to voluntarily leave within the next year: XXX

### TEAM RISK REPRESENTATION

56%

LOW RISK

40%

MEDIUM RISK

4%

HIGH RISK

### INDIVIDUAL PROBABILITIES

- Employee A (5.8%)
- Employee B (5.4%)
- Employee C (4.3%)
- Employee D (3.9%)
- Etc.

- Employee J (14.4%)
- Employee K (13.2%)
- Employee L (12.2%)
- Etc.

- Employee Q (21.2%)

## Personal Philosophy of Analytical Leadership

*Role, chief responsibilities and required background of the analytical leader(s) for this transformation*

### Role

- Lead the People Analytics strategy, vision, change management, and deliver results in collaboration with a small team of analysts
- Drive analytics approach and build upon and deliver on a thoughtful and comprehensive analytics roadmap
- Drive capacity and analytical culture within the People organization to utilize data and analytics to drive fact based decision-making

### Responsibilities

- Lead, coach, and mentor other members of the People Analytics team; adapting leadership style and being flexible given the situation
- Partner with People team and business leaders to understand key business questions and design analyses to answer these questions
- Present results of analyses in a concise and effective manner, to drive fact-based decision making at all levels within the organization
- Deliver quarterly updates with HR leaders to share key metrics, insights, and business impacts
- Identify and deliver on opportunities to support key People Team initiatives through robust analyses, modeling, and dashboards
- Develop methods to measure effectiveness of all people programs, and uncover insights and opportunities
- Enhance enterprise data strategy
- Create a Data University to up skill employee data literacy at all levels

### Background

- Master's degree or PhD in a quantitative field (e.g., data science, statistics, economics, etc.)
- Excellent leadership skills; ability to lead people and/or a team
- Excellent change management skills
- Excellent written, communication, and presentation skills
- Experience driving complex analysis and predictive analytics
- Experience providing consultative support for executives and HR; translating business goals into analytics solutions and business value
- Experience with SQL, Tableau, and/or other related reporting and analytic tools
- Experience with R, Python, SPSS, or SaaS
- Advanced skills in MS Office, including PowerPoint and Excel

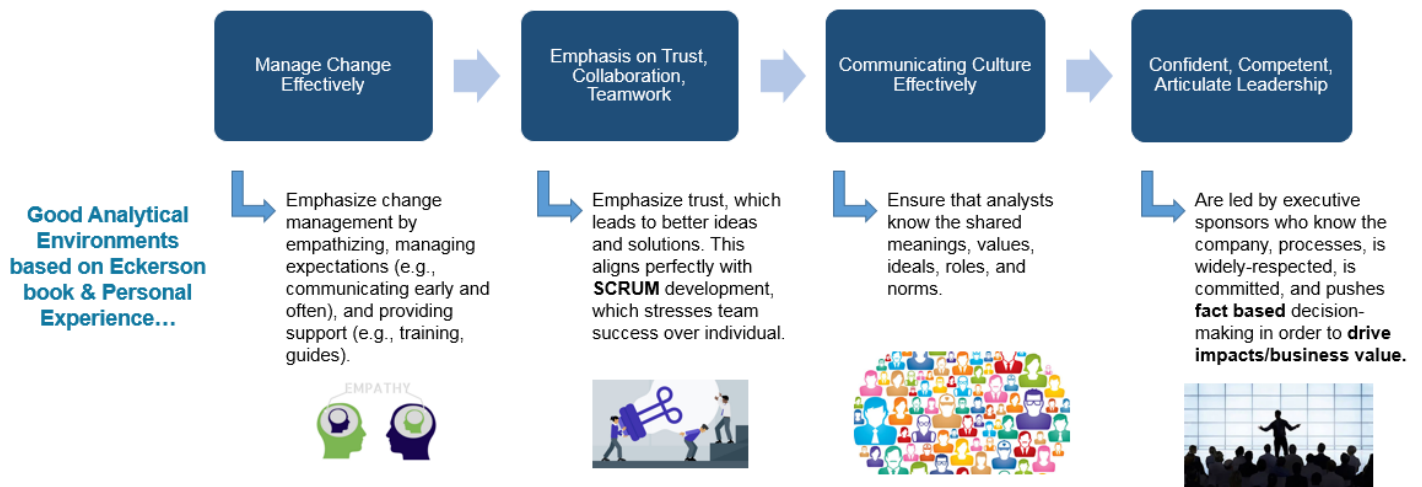
## Personal Philosophy of Analytical Leadership

*How Adaptive, Situational, and Transformation Leadership Fits Within Our Analytical Environment*

Challenges

Changing Dynamics, Uncertainty, New Situations, and Changing Environments

Create and articulate a clear direction and vision for the organization; Inspire, Understand & Adapt, and be Aware



Accomplish more than what is usually expected of followers, increased support for the greater good

## Personal Philosophy of Analytical Leadership

