Scaling Workforce Management Dashboards in Healthcare

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Agenda

- Initial Problem & First Solution
- Overcoming Challenges at Scale
- Modern Iterations & Impact
- Future State & Strategic Vision

Initial Problem & First Solution

- Leadership needed unified front-line performance data, but metrics were scattered across siloed, manual files

- Built Excel-based OKR Dashboard

- **Benefits:**

  - Enabled performance tracking

  - Productive 1:1s

2025 OKR Dashboard

Employee Name	Specialty Product	Manager	FTE Status	Hire Date	YTD # Quality Audit Fails?	YTD Quality % Score	YTD Quality OKR Score	YTD DPE Avg % Score	YTD DPE OKR Score	.	Target	YTD Productivity % Score	YTD % within Productivity Target	YTD Productivity OKR Score	.	Completed by Deadline? (Y/N)	Attendance Threshold Met? (Y/N)	.	2025 OKR Score
					Provider Value						**Operational Value**					**Company Value**			
					Quality Audits (QA)			Decision Precision Exam			Productivity					Training & Education	Attendance		
John Doe	Cardiology	Buzz Lightyear	1	1/1/2020		98	4	100	5		14.5	15	3.45%	3		Y	Y		4
Jane Smith	Cardiology	Buzz Lightyear	1	12/5/2020		90	3	92	3		7.25	7.28	0.41%	3		Y	Y		3
Alex Brown	Radiology	Sally Sea	1	1/1/2020		100	5	100	5		7.5	8.5	13.33%	5		Y	Y		5
Sarah Lee	Radiology	Sally Sea	1	8/10/2025		90	3	New Hire	NH		3.5	3.2	-8.57%	2		N	NH		2
Matt Johnson	Phys Med	Dave Davis	0.5	5/15/2023		92	3	94	4		5	4.99	-0.20%	3		Y	Y		3
Emily Davis	Phys Med	Dave Davis	1	4/3/2019	1	85	1	85	2		5	6.2	24.00%	4		N	N		1
Chris Wilson	MSK	Jack Smith	0.75	7/1/2022		95	4	91	3		10	8.5	-15.00%	1		Y	Y		2
Laura Martinez	MSK	Jack Smith	1	6/15/2022		92	3	95	4		10	10.1	1.00%	3		Y	Y		4
Tom Harris	Pharm	Phil Phillips	1	12/3/2018	2	75	1	80	1		7	9.5	35.71%	5		Y	Y		1
Anna Clark	Pharm	Phil Phillips	1	1/15/2021		99	4	96	4		7	6.45	-7.86%	2		Y	Y		3

*Note - this is a very simplified and edited version removing staff information, renaming/editing/removing objective measures, altering scoring criteria, etc. This is just intended to serve as a static framework to display Excel capabilities

**Additional note - all embedded formulas (including LOOKUPS, calculations, etc) were removed and replaced to ensure adherence to proprietary policies.

Overcoming Challenges at Scale

Untangled Data Web
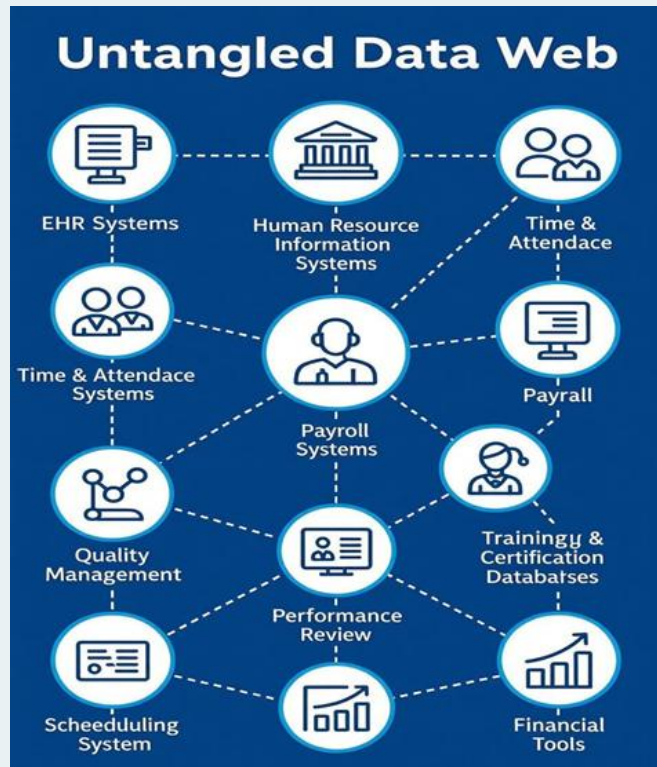
- Scaling from 19 to 850+ staff
  - Overwhelming manual updates
  - Data integrity risks
  - Growing complexity
- Tackled by centralizing files, automating pulls (XLOOKUPs, macros)
- Limitations highlighted need for true modernization

Modern Iterations & Impact

- Built a modernized, unified dashboard integrating principles from my Data Analytics Program

- Intended results:
  - Reduce manual work
  - Improve accuracy
  - Provide dynamic insights
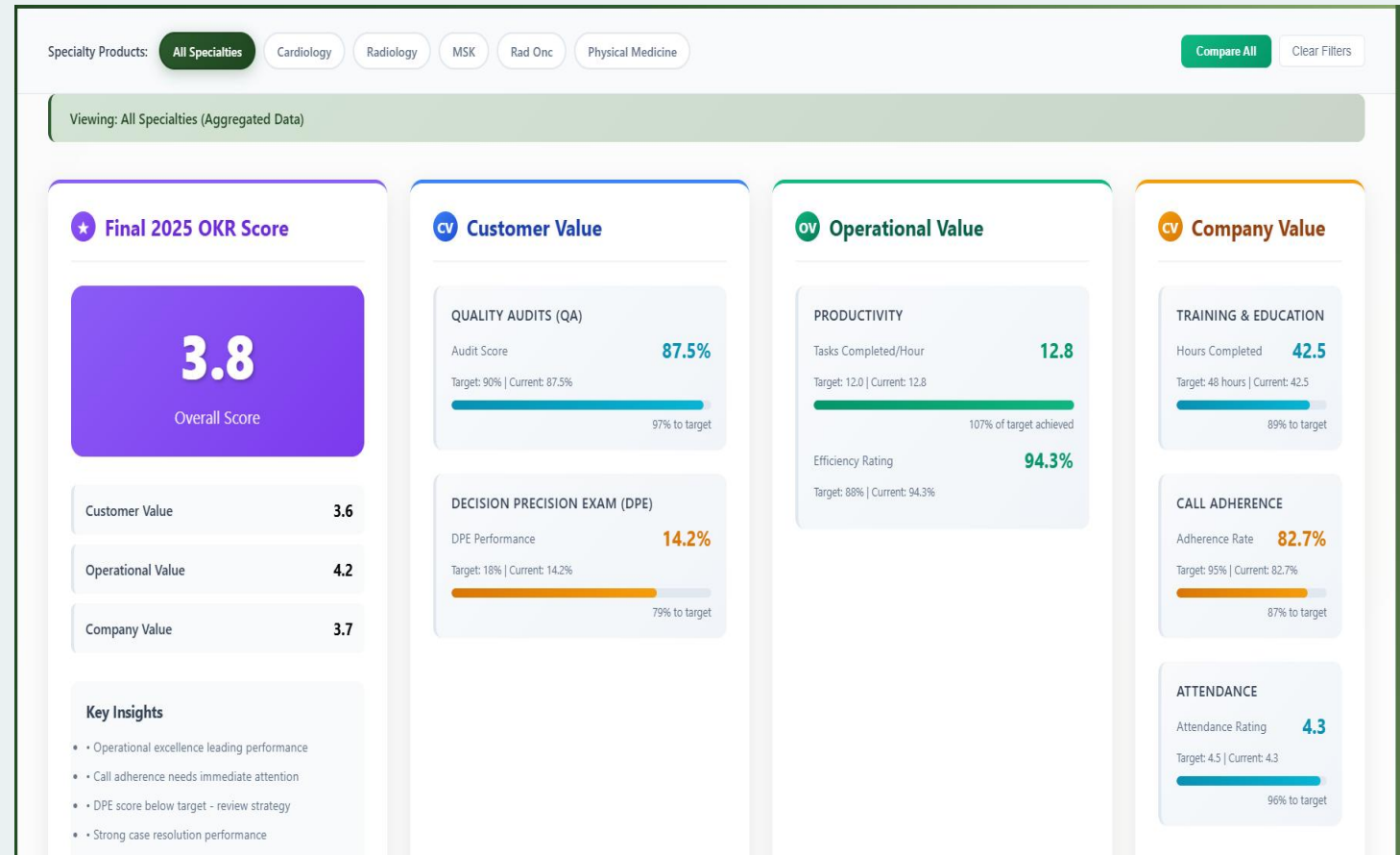
Future State & Strategic Vision

- Next steps:

  - Data lakes (Snowflake/BigQuery)

  - Fully automated ETL pipelines

  - AI-driven tools for predictive staffing and continuous improvement

- Strategic vision:

  - Building resilient, scalable analytics platforms drive best-practice labor management and positions companies for future growth with upcoming technological advancements.

Thank you