

Analytical Requirements and Dashboard Design

1. Bank Services and Packages Fees
2. Workforce Diversity & Pay Equity

1.0 Subject Area: Analyzing Bank Service Packages / Fees

1.1 Overview / Goal Context

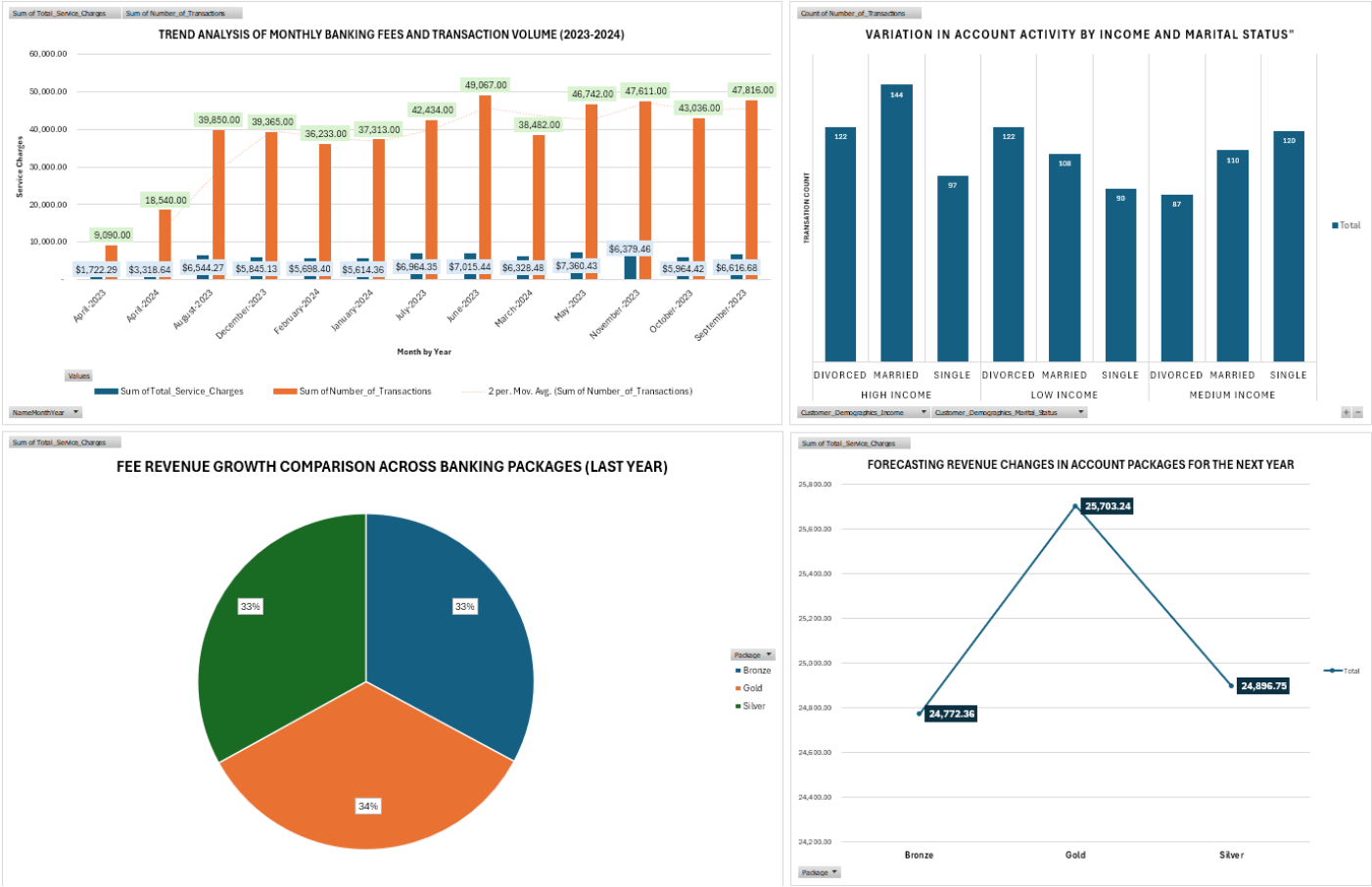
- **Maximize Banking Fees:** Understanding how much we charge in services fees relative to the volume of transactions done on an account helps us understand if we need to raise monthly banking fees or change the number of free transactions with different banking packages.
- **Design New Fee Packages:** The current account fees/packages have been in place for 5 years, analyzing the trends and patterns during that time frame would be ideal. Fee packages are based on both account activity (volume of transactions) and balance level. Determining where the best breakpoints are for our customer base is key to designing proper packages (e.g., customers with large balances and low activity should be free of fees, customers who are highly active with lower balances we can charge more fees to).

1.2 Analytical Questions

Question	Type of Analytic				Suitable Visualization Type(s)				Data Requirements		
	Describe	Diagnose	Predict	Prescribe	Trend	Compare	Pattern	Rank	Proportion	Dimensions	Measures
What is the trend in monthly banking fees relative to transaction volume over the past 5 years?	X				X					Time (Month/Year)	Total banking fees, Transaction volume
How does account activity (transaction volume) vary by customer demographic profiles (income, marital status, education)?		X				X				Customer demographics (Income, Marital Status, Education)	Transaction volume
What are the breakpoints for fee packages based on account balance levels and activity?	X						X		X	Account balance levels, Account activity (transaction volume)	Fee charges, Customer count or percentage within each fee package tier
Which banking packages have shown the highest growth in fee revenue over the last year?	X							X		Banking package	Fee revenue growth
Considering current trends in service charges, account balance, and transaction volume, what account packages are most likely to experience a significant increase/decrease in revenue in the next year?			X		X					Account Package (e.g., Gold, Silver, Bronze) Time (Month/Year) - to track trends and forecast future revenue	Total Service Charges - to understand current fee revenue trends Average Account Balance - to assess account health and potential revenue impact Transaction Volume - to gauge account activity and revenue potential

1.3 Mock-Up

Banking Metrics Overview: Fees, Account Activity, and Revenue Projections



2.0 Subject Area: Workforce Diversity & Pay Equity

2.1 Overview / Goal Context

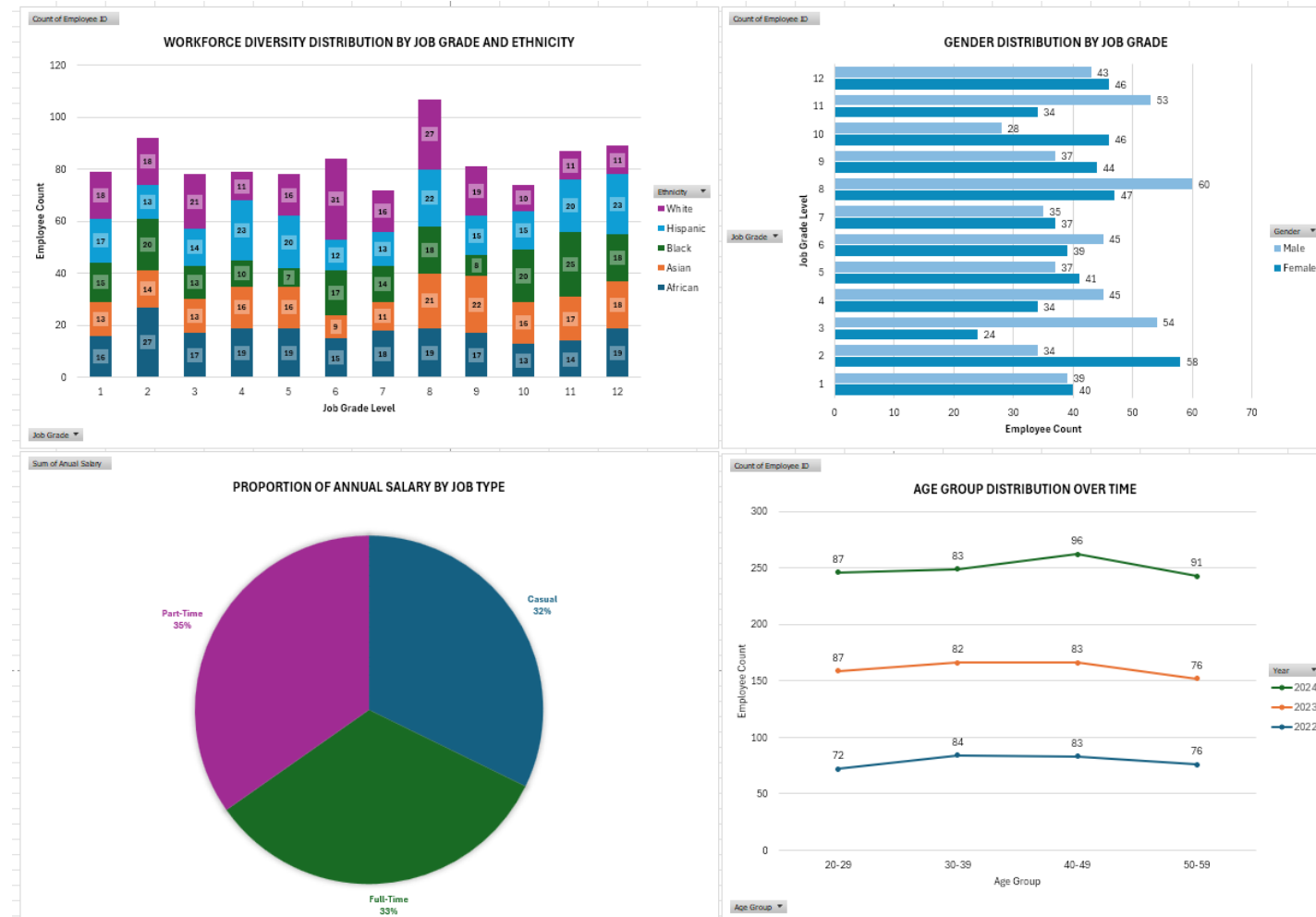
- **Meet Workforce Diversity Targets:** As part of participating in a Federal employment diversity program, our organization (a nation-wide transportation company) needs improved reporting in order to correctly report back to the Federal agency on the success of our hiring programs.
- **Ensure Fair and Equal Pay:** We need to be able to show that our workforce reflects the communities in which we operate, has a fair gender balance, and that we are closing any gaps on gender or ethnic pay (same job, same experience, same pay regardless of gender or ethnicity).

2.2 Analytical Questions

Question	Type of Analytic				Suitable Visualization Type(s)					Data Requirements	
	Describe	Diagnose	Predict	Prescribe	Trend	Compare	Pattern	Rank	Proportion	Dimensions	Measures
What is the distribution of workforce diversity by ethnicity across different job grades?	X								X	Employee Job Grade, Employee Ethnicity	Count of Employees (to represent workforce diversity)
How does the gender balance vary across different levels of responsibility (job grades) within the organization?	X					X				Employee Job Grade, Employee Gender	Count of Employees (to analyze gender balance)
What is the distribution of annual earnings by employment type (full-time, part-time, casual)?	X								X	Employment Type	Annual Earnings
Are there any disparities in pay equity based on gender and job grade?		X						X		Employee Job Grade, Employee Gender	Average Salary
How has workforce diversity evolved over time in terms of age groups?	X				X					Year, Employee Age Group	Count of Employees (to track workforce diversity changes)

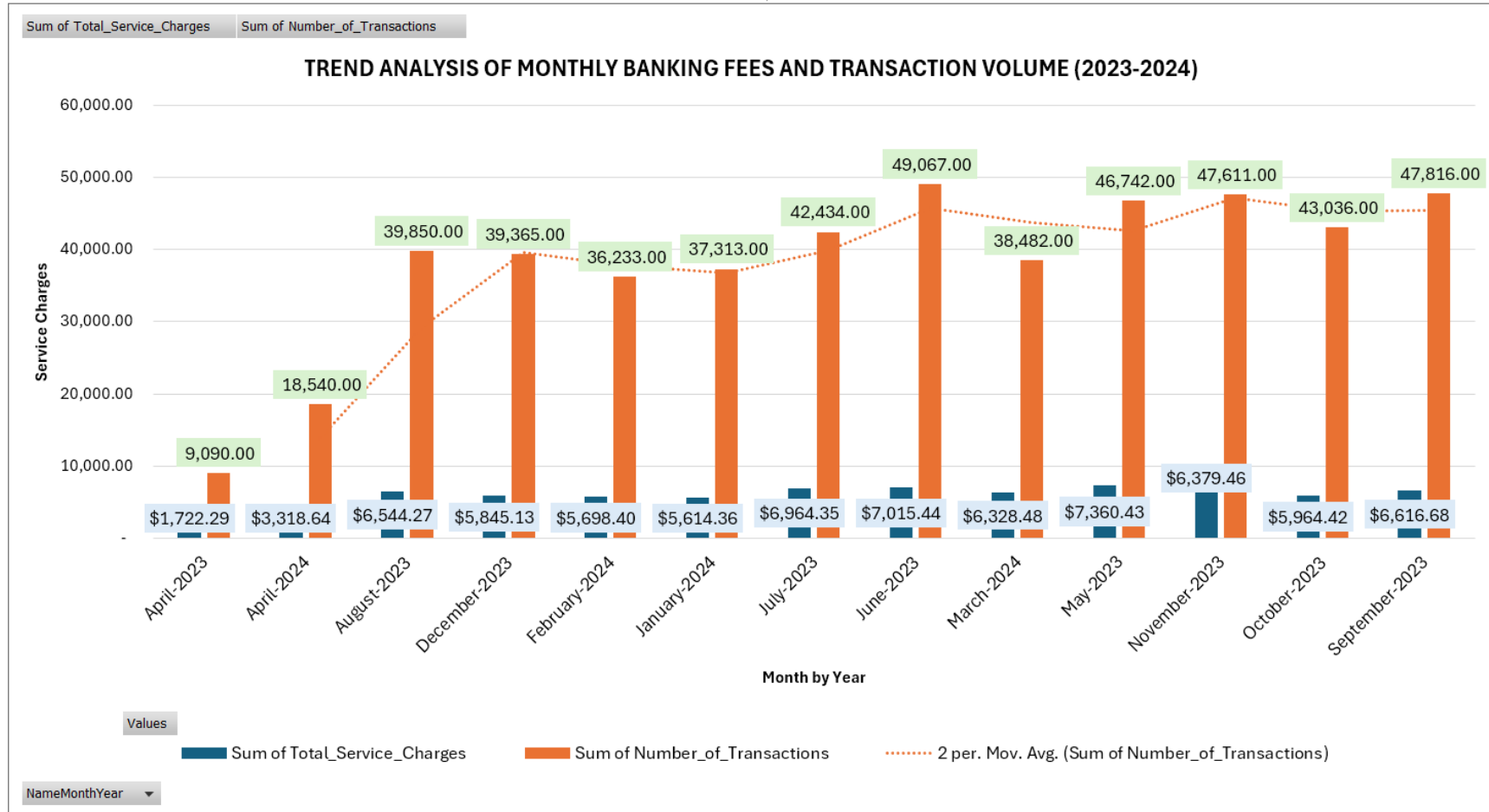
2.3 Mock-Up

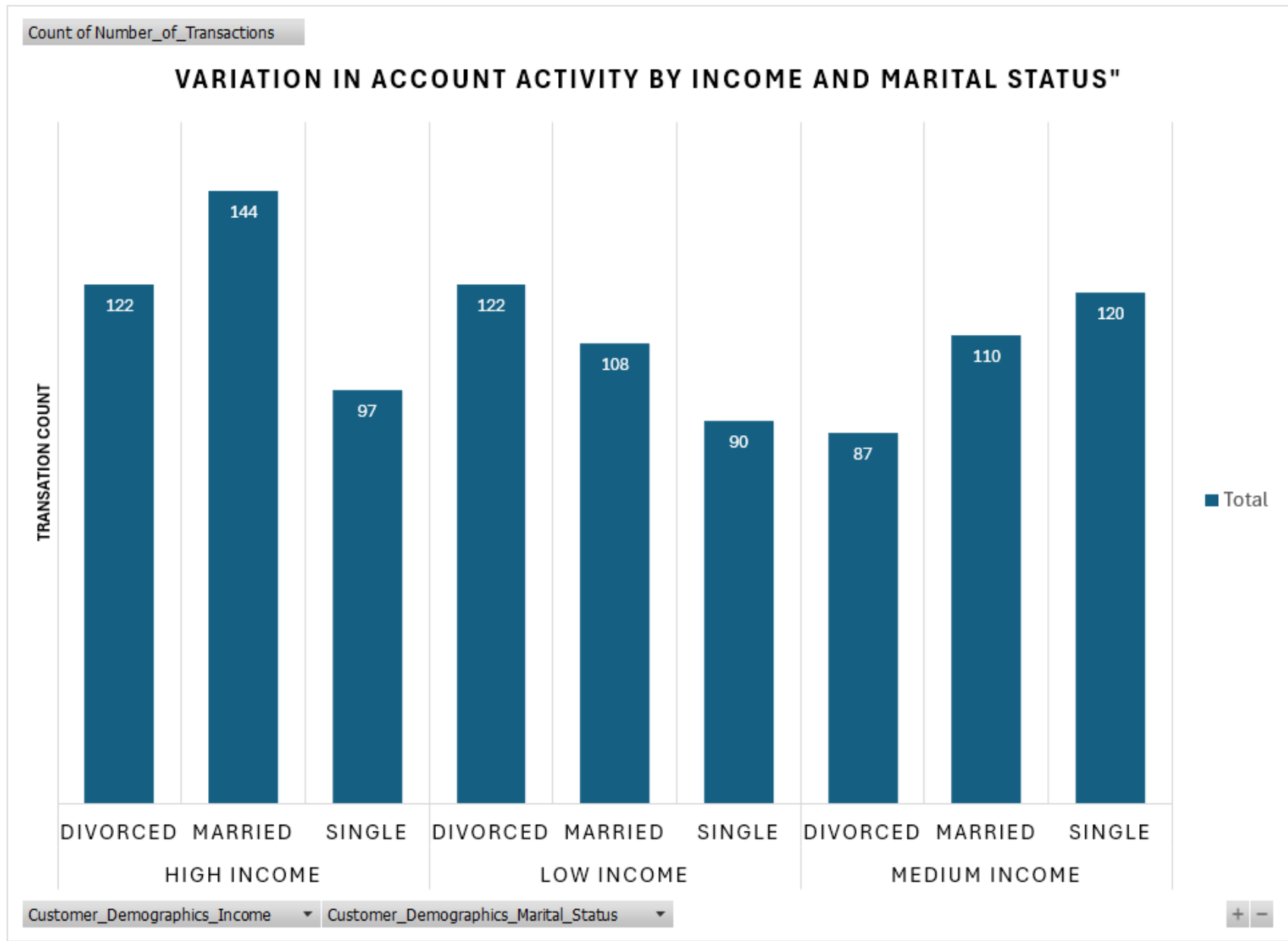
Employee Diversity and Demographics Analysis



Separate graphs for each subject area for better understanding

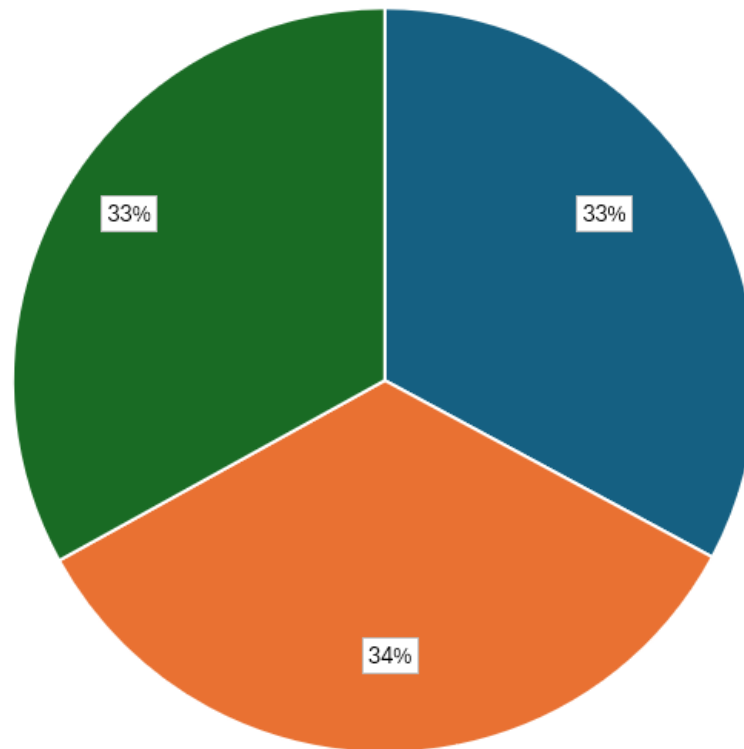
Subject Area: Analyzing Bank Service Packages / Fees:





Sum of Total_Service_Charges

FEE REVENUE GROWTH COMPARISON ACROSS BANKING PACKAGES (LAST YEAR)

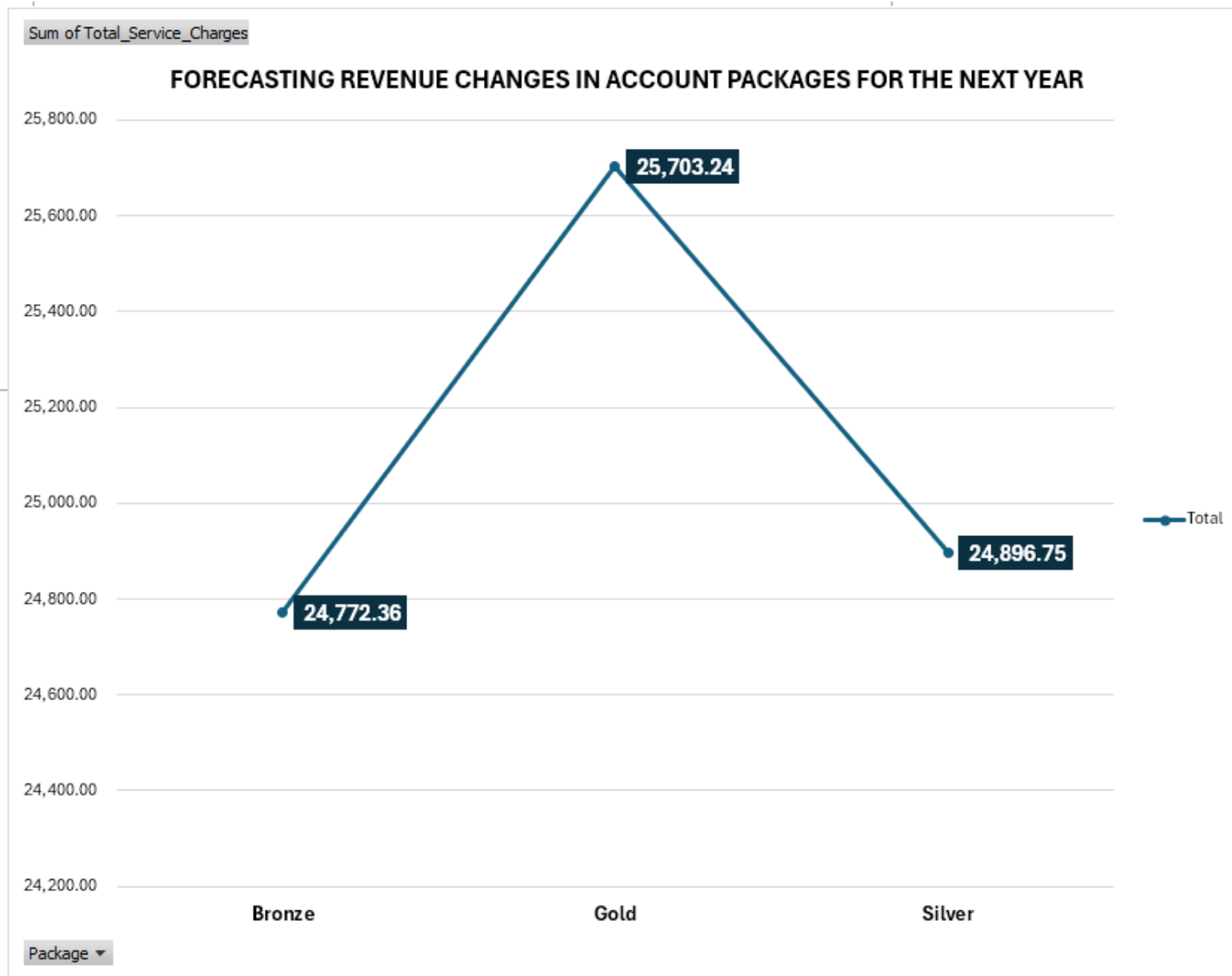


Package ▼

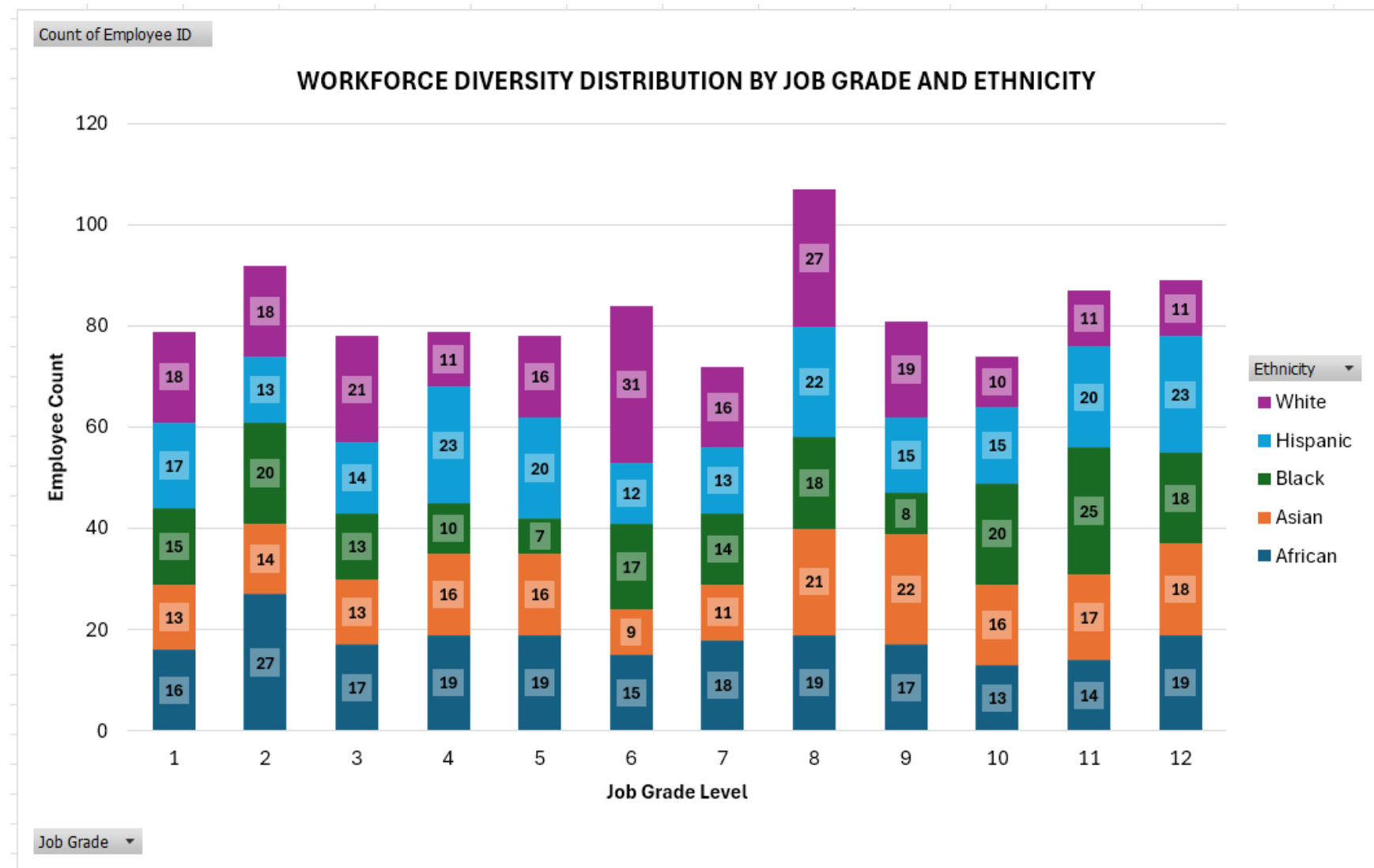
■ Bronze

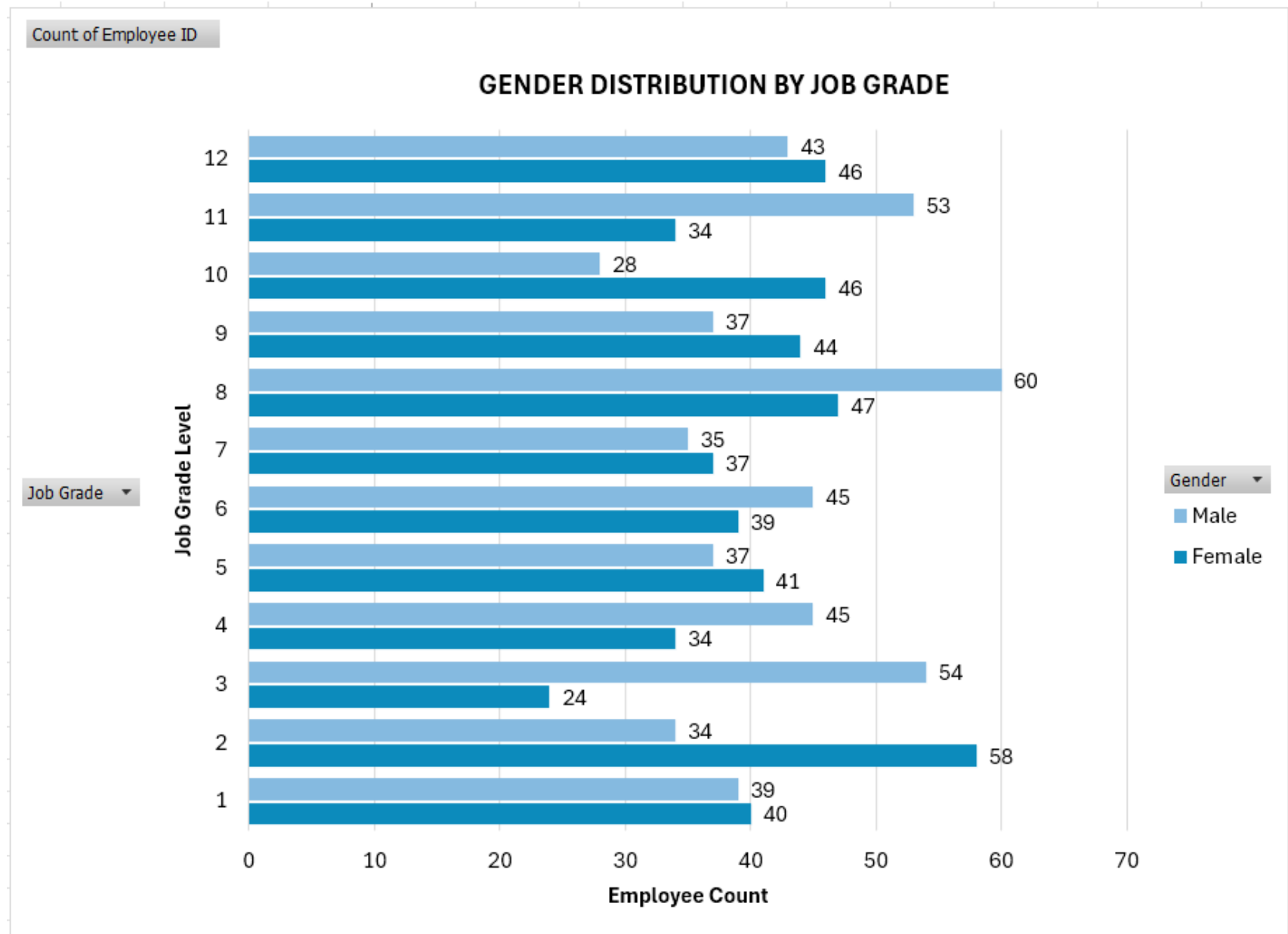
■ Gold

■ Silver



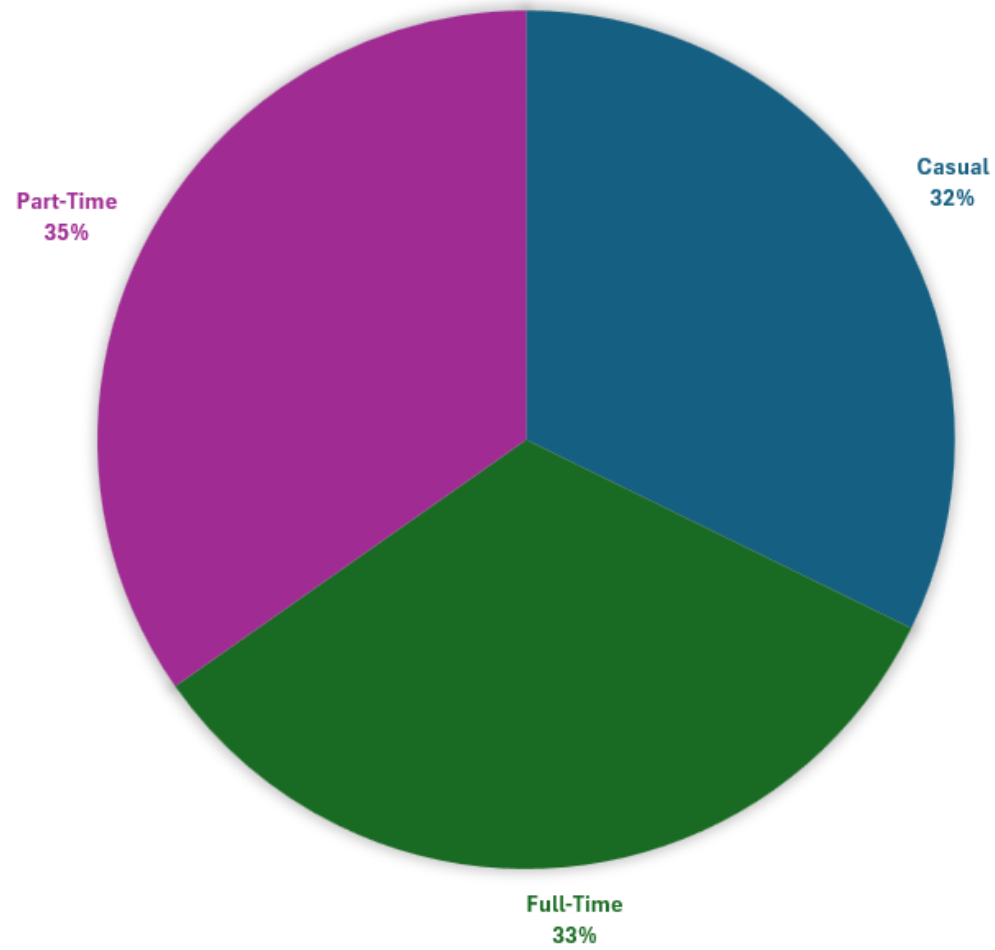
Subject Area: Workforce Diversity & Pay Equity:

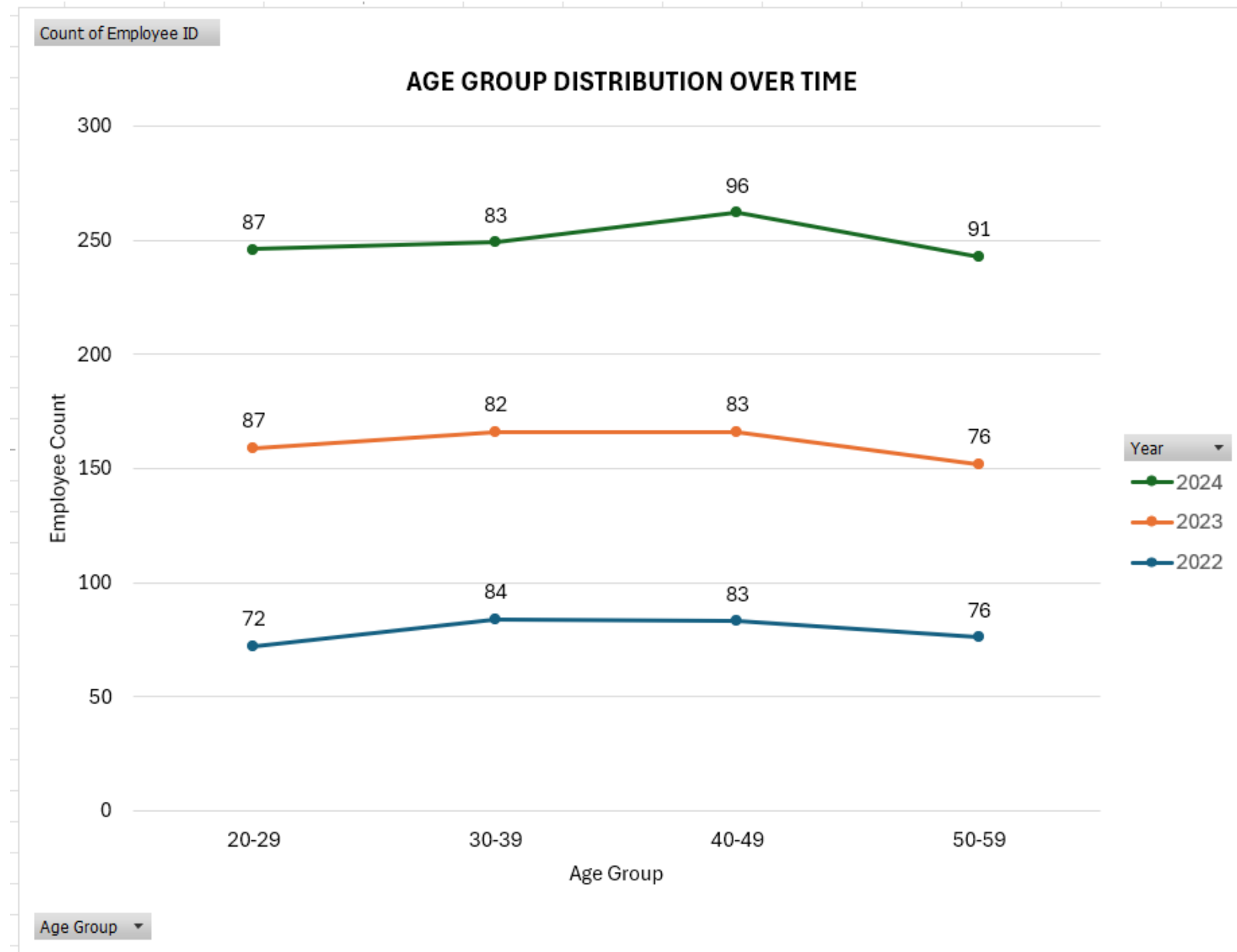




Sum of Annual Salary

PROPORTION OF ANNUAL SALARY BY JOB TYPE





Dummy Data used for each subject area:

Are attached in CSV File.