Caller Portal Portfolio (2018 – 2019):

The concept of a spreadsheet to track student fundraiser performance on a weekly basis existed long before I became the data analyst for the Telefund. However, the old spreadsheet was hardly user-friendly and had a myriad of issues that resulted in it hardly being used. This was the first major project that I took on as the data analyst, and it was my pet project for the better part of the year.

A list of the changes I made is included on the “Caller Portal Instructions” sheet within the workbook. I am proud of how well it has turned out. It is the principle tool that student supervisors and management use to access the performance of individual callers.

Through this project, I did not learn many new technical skills but I learned the importance and value of feedback. First and foremost, this workbook is meant to help others understand employee performance. I regularly met with management and student supervisors to figure out what features they thought were most important and how the data could be communicated more effectively.

When you examine the workbook you might realize that this project could have been more easily or stylishly done with Tableau or other interactive data visualization programs. This is true however, one of the main goals of this project was to have interface that was easily accessible via Microsoft SharePoint, the file sharing app used at LDSP, without requiring the company to purchase software.

Calling Statistics Report Generator

Behind the scenes of caller portal, there are weekly reports evaluating and ranking employee performance for the previous week. These reports make-up the data that supports caller portal, but they also are used independently to recognize peak performers from the previous week. Additionally, these reports can be and need to be generated for any time period (daily, weekly, monthly, semesterly, yearly, etc.).

However the raw data that we get from our data pulls is not stylishly formatted and does not provide formulated statistics or ranking. In order to format and formulate the raw data, a previous individual wrote an excel macro to do it automatically.

Then in the fall of 2018, we re-worked our key metrics to emphasize recurring giving and the macro needed to be adjusted. I went in and re-wrote large sections of the macro to fix a couple bugs and change how we ranked callers so it would be fairer.