A Power BI Job Simulation by PWC Switzerland by Forage

Background Information
All in on digital transformation: Creating a stronger, nimbler, more resilient future!

We aim to build innovative technology solutions that differentiate us from our competitors and digitise the business. Part of that included a strategic decision to invest in upskilling programmes so our people could learn how to use digital tools for data visualisation as well as automation, data cleansing and more.

If our people could use these tools to solve common problems, they'd help us become more efficient and growth-oriented now and more innovative later in Business Services and beyond. Now, employees are learning to build bots – over 2,400 have been created so far – to automate workflows. We continue to invest to make processes more intuitive using machine learning, PowerBI and eventually artificial intelligence (AI). These are key to working faster and solving problems differently for ourselves and our clients.

This is why you're here! Our Digital Accelerator programme is an internal chance that takes groups of our employees out of their day jobs and puts them through trainings that teaches them skills in technology such as automation, machine learning, design thinking, and digital storytelling. PowerBI is an important part of it as visualising data helps to handle and understand clients.

So, become a Digital Accelerator yourself and start your PowerBI journey with us!

Scenario 1

The digital revolution and our fast-changing world require a skills revolution. And it's not just about the digital skills. The skills revolution is about helping people build their digital awareness, emotional intelligence and creativity to fully participate in the digital future workplace — and it needs to start now.

At PwC, we are working with other organisations across the world, building on our work with clients and on upskilling our 276,000 people. Still, more must be done if we are to ensure everyone has the opportunity to learn, work and participate in the digital world. This is at the heart of our purpose.

We are enabling employees who are motivated to further accelerate their skills to do so by offering them a "career pivot" to become what we call "Digital Accelerators". Accelerators rapidly deepen their skills in digital specialties, such as data, automation, AI, and digital storytelling by learning a variety of self-service tools and coding languages and applying these skills across our business.

We're happy you joined us, welcome to the team! Giulia is your manager and helps you through your upskilling journey in PowerBI - your step to become a true data jedi and Digital Accelerator.

But wait no more, word spreads fast and an important client reached out to you to help him visualising their data.

Task 1

It's omnipresent: telecom marketing. Better price here. Better service there. Best for small businesses here. Best for young urbanites there. But what do customers really want? Our client, a big telecom company needs to know. This email just arrived for you:

Request: Call Centre Trends

Claire (PhoneNow)
To ● You

Reply | Reply All | → Forward | ...

Hi Digital Accelerator,

May I introduce myself? I'm Claire, Call Centre Manager here at PhoneNow. My colleague suggested I reach out to you. Pleased to meet you.

I'm looking for transparency and insight into the data we have here at the Call Centre. For example: total number of calls answered and abandoned, speed of answer, length of calls, overall customer satisfaction, etc. What I'm after is an accurate overview of long-term trends in customer and agent behaviour.

I was told you are great at visualising data in such a way that important aspects become very clear. That's precisely what I need. Could you please prepare a dashboard on Call Centre trends that I can use as a basis for discussion with management? I'll provide you with the required data, of course.

Looking forward to hearing from you.

Best regards,
Claire

Create a dashboard in Power BI for Claire that reflects all relevant Key Performance Indicators (KPIs) and metrics in the dataset. Get creative!

Possible KPIs include (to get you started, but not limited to):

- Overall customer satisfaction
- Overall calls answered/abandoned
- Calls by time
- Average speed of answer
- Agent's performance quadrant -> average handle time (talk duration) vs calls answered
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Scenario 2

A few weeks after presenting your dashboard to the management, the Retention Manager from the telecom reaches out to you directly. He was impressed by your work and asked if you can put together a dashboard about customer retention.

In addition, to better understand the data, the telecom Retention Manager has scheduled a meeting with the engagement partner at PwC to cover these points:

- Customers in the telecom industry are hard-earned: we don't want to lose them
- The retention department is here to get customers back in case of termination
- Currently, we get in touch after they have terminated the contract, but this is reactionary: it would be better to know in advance who is at risk
- We have done customer analysis with Excel: it has always ended in a dead-end

- We would like to know more about our customers: visualised clearly so that it's self-explanatory for our management

The Retentions Manager has provided some information, have a look through the resource section.

Task 2

Your colleague, the engagement partner, asks you to do the following tasks:

1. Define proper KPIs
2. Create a dashboard for the retention manager reflecting the KPIs
3. Write a short email to him (the engagement partner) explaining your findings, and include suggestions as to what needs to be changed

Scenario 3

Human Resources at our telecom client is highly into diversity and inclusion. They've been working hard to improve gender balance at the executive management level, but they're not seeing any progress. They're reaching out to us for help.

At PwC Switzerland we are often approached by clients seeking support with diversity and inclusion. Companies need a workforce of diverse talents and backgrounds to succeed in an increasingly complex and heterogeneous world. To us, diversity and inclusion are business imperatives, not just nice-to-haves. We aim for all of our teams to feel welcome and appreciated. But actually achieving this and unlocking its potential involves a whole set of practical challenges.

Why is this so?

[Think about the importance of strategy, awareness and education, analytics and inspiration](#).

Here is a hint: Calculating the following **measures** could help to define proper KPIs:

- # of men
- # of women
- # of leavers
- % employees promoted (FY21)
- % of women promoted
- % of hires men
- % of hires women
- % turnover
- Average performance rating: men
- Average Performance rating: women

Task 3

1. Define relevant KPIs in hiring, promotion, performance and turnover, and create a visualisation
2. Write what you think some root causes of their slow progress might be

"That's it, you're done.

Hope this taste of futureproofing yourself with Virtual Case Experience in Power BI as a Digital Accelerator at PwC Switzerland was good.

We aim to be the first movers in digitisation, blockchain, automation, artificial intelligence for our clients – and, of course, for the future of our firm. Powerful stuff."

Dashboards created-

1. callcentre -Telecom Company PhoneNow is looking for transparency and insight into their customers' data for an accurate overview of long-term trends in customer behavior and agent performance.
2. churn- The company wants some insights on customer retention so that it would be better to know who is at risk of terminating their contract with the company.
3. diversity_inclusion- HR department at the company wants support with diversity and inclusion. To improve gender balance they need a workforce of diverse talents and backgrounds to succeed in an increasingly complex and heterogeneous world.

Tasks completed:

1. Completed a job simulation where I strengthened my PowerBI skills to better understand clients and their data visualization needs.
2. Demonstrated expertise in data visualization by creating Power BI dashboards that effectively conveyed KPIs, showcasing the ability to respond to client requests with well-designed solutions.
3. Strong communication skills reflected in concise and informative email communication with engagement partners, delivering valuable insights and actionable suggestions based on data analysis.
4. Leveraged analytical problem-solving skills to examine HR data, mainly focusing on gender-related KPIs, and identified root causes for gender balance issues at the executive management level, highlighting a commitment to data-driven decision-making.

Certificate of Completion
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