

# Dashboard Requirements Document

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**Audience/User:** L&D department (including L&D leader, L&D executive)

## **Purpose:**

The purpose of this document is to capture and detail the requirements for the dashboard, serving as a comprehensive guide for its development. It records the theoretical framework and explanations behind the metrics, KPIs, and other visualized data points displayed in the dashboard.

## **Key Questions:**

### **Big Question: How is the training progression across programs?**

- What is the completion rate for planned, mandatory, and out-of-plan courses?
- How many courses are completed on time versus late, and what trends emerge over time?
- Are there significant gaps between planned and out-of-plan participant numbers?

### **Big Question: What insights can we gain about the learners?**

- How are training participants distributed by demographics (e.g., gender, age, education, department, job title)?
- Which learners have significantly higher training hours compared to others?
- Are certain demographics or job roles more engaged in training programs?

### **Big Question: Are training costs being managed efficiently?**

- How do actual training costs compare to the budgeted costs?
- Which programs exceed their budgets, and what are the potential causes?
- Is the cost allocation reasonable across programs, and does it correlate with engagement and efficiency?

## Dashboard Summary Table:

Dashboard	Description
Home	Provide a high-level summary of key training metrics. It consolidates critical insights from the three detailed dashboard pages, enabling quick assessment of overall training performance and trends to support informed decision-making.
Training Progression	Provides key metrics and visualizations to track the progress of training activities. It includes detailed insights such as the completion rate of courses (including mandatory ones), the number of planned versus unplanned courses, and the status of on-time or delayed completions. This dashboard helps the L&D department effectively monitor training performance, ensure compliance, and address any delays in a timely manner.
Learner Insights	Provide valuable insights into learners' demographics and job positions, offering a comprehensive view of the training audience. Additionally, it highlights learners with significantly higher learning durations compared to others, enabling the L&D department to identify patterns, tailor training strategies, and optimize learning experiences for different groups.
Cost Efficiency	Provides insights into the breakdown of training costs and evaluates the appropriateness of the cost distribution. This dashboard helps the L&D department determine whether training expenditures are aligned with budgetary expectations and whether resources have been allocated effectively to maximize the impact of training programs.

## Key Metrics and Visualizations

### A. Home

#### Training Progression Metrics

Metrics	Formula	Purpose
Training Hours Utilization	$\text{Actual Training Hours} / \text{Planned Training Hours}$	Track how much of the planned training time is utilized.
Timeliness of Course Delivery	$\text{Number of On-time Courses} / \text{Total Planned Courses}$	Monitor the percentage of courses completed on time.

Training Completion Rate	$\text{Completed Trainings} / \text{Total Trainings Planned}$	Measure how many training sessions are successfully completed compared to the plan.
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### *Learner Insights Metrics*

Metrics	Formula	Purpose
Training Hours Per Learner	$\text{Actual Training Hours} / \text{Actual Learners}$	Assess the average training hours spent per learner.
Learner Plan vs. Actual	$\text{Planned Number of Learners} / \text{Actual Learners}$	Identify discrepancies between the planned and actual number of participants.
Mandatory Training Compliance	$\text{Number of Employees Completing Mandatory Training} / \text{Total Employees Required to Complete}$	Check compliance rates for mandatory training programs.

### *Cost Efficiency Metrics*

Metrics	Formula	Purpose
Cost Overrun or Savings Rate	$(\text{Actual Costs} - \text{Budgeted Costs}) / \text{Budgeted Costs}$	Identify whether the training was over or under budget, expressed as a percentage.
Cost Per Learner	$\text{Actual Training Costs} / \text{Actual Learners}$	Assess the average cost of training per participant.
Cost Efficiency per Training Hour	$\text{Total Training Costs} / \text{Training Hours}$	Evaluate the cost-effectiveness of each hour of training.

## **B. Training Progression**

### *Overview*

Metrics	Formula	Purpose
Total Courses		Tracks the number of training courses offered, indicating the breadth of training programs.
Total Learners		Measures the number of participants, reflecting the reach

		and engagement of the training programs.
Training Completion Rate	<i>Completed Trainings / Total Trainings Planned</i>	Measure how many training sessions are successfully completed compared to the plan.

### *Completion Rate*

Visuals	Description	Purpose
Completion Rate of Planned Courses	Percentage of planned courses by completion status.	Monitors if planned courses are progressing as expected and identifies delays.
Completion Rate of Out-of-plan Courses	Percentage of out-of-plan courses by completion status.	Assesses the effectiveness and completion of unplanned courses.
Completion Rate of Mandatory Courses	Percentage of mandatory courses by completion status.	Ensures mandatory training is completed to meet compliance.
Completion Rate of Mandatory Learners	Percentage of mandatory learners by completion status.	Tracks whether required learners complete their training on time.

### *Training Timeliness & Participation Analysis*

Visuals	Description	Purpose
Late vs On-time Courses by Months	Compares late and on-time courses over time (monthly).	Monitors course completion timeliness and identifies trends in delays.
Planned vs Out-of-Plan Courses	Shows participants in planned vs unplanned courses.	Assesses participation in planned vs unplanned courses.

## **C. Learner Insights**

### *Training Participants*

Visuals	Description	Purpose
Training Participants by Gender	Displays the distribution of training participants by gender.	Helps evaluate the gender balance in training programs and ensure inclusivity.
Training Participants by Age	Shows the age distribution of training participants.	Assesses whether training opportunities are reaching all age groups within the organization.

Training Participants by Education	Displays the education level of training participants.	Provides insight into the educational background of participants, helping tailor training content accordingly.
Training Participants by Department	Shows the number of participants from each department.	Helps understand which departments are engaging most with training programs and identify areas for improvement.
Training Participants by Job Title	Displays the distribution of participants based on their job titles.	Assesses whether training programs are effectively targeting the right job titles and levels within the organization.

### *Analysis of Training Hours*

Visuals	Description	Purpose
Training hours per Learners by Education	Shows the total training hours per learner based on their education level.	Assesses the training commitment relative to educational background, identifying if certain education levels require more or less training.
Training hours per Learners by Position	Displays the total training hours per learner based on their position or job title.	Evaluates the training hours invested in learners at different job positions, helping to ensure appropriate training allocation.

## **D. Cost Efficiency**

### *Overview*

Metrics & Visuals	Formula/Description	Purpose
Actual Training Costs		Tracks overall training expenditures to ensure transparency and financial accountability.
Cost Overrun	(Actual Training Costs – Budgeted Training)	Identifies instances where training programs exceeded their allocated budgets.

	Costs)/Budgeted Training Costs	
Programs Exceeding Budget	$(\text{Number of Over-Budget Programs} / \text{Total Programs}) \times 100\%$	Highlights budget management issues and helps in improving cost control for future programs.
Actuals vs. Budgeted Costs	Compares actual training costs to budgeted amounts	Provides a clear view of cost efficiency and identifies deviations from budget allocations.

### *Training Cost vs Learner Engagement*

Metrics & Visuals	Formula/Description	Purpose
Costs per Learner	Total Actual Training Costs/Total Number of Learners	Evaluates cost efficiency by measuring the average expense per learner, ensuring optimal resource allocation.
Learner Engagement Efficiency	$(\text{Training Completion Rate} \times \text{Number of Learners}) / \text{Actual Training Costs}$	Assesses how effectively training resources are engaging participants, helping to improve engagement strategies.
Cost and Engagement analysis by Position	Compares costs and engagement levels for learners in different positions.	Identifies the correlation between training costs and learner engagement by job position to optimize allocation.

### *Training Cost and Time analysis*

Metrics & Visuals	Formula/Description	Purpose
Costs per Training Costs	Total Actual Training Costs/Total Training Duration(Hours)	Measures the average cost per training session, ensuring cost-effectiveness across programs.
Training Hours per Learners	Total Training Duration/Total Number of Learners Total	Evaluates the average time spent by each learner on training, identifying any imbalances or gaps.
Training Duration vs Cost by Program	Compares program duration and costs, with bubble size	Analyzes the relationship between training duration and

	indicating learner count.	cost, helping identify efficient programs.
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