

PitchBook Business Intelligence Analyst Recruitment Drive

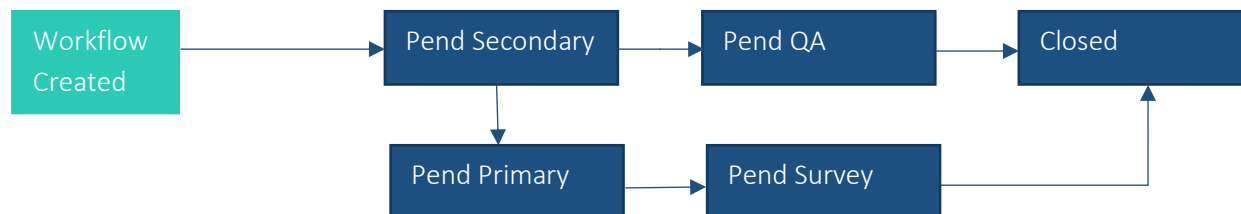
Case Study

A new Team Leader needs your help to better understand his/her Data Operations Team. You are provided with sample data that a PitchBook Business Intelligence Analyst encounters daily. Use the tools you are comfortable with to analyze and interpret the data to help provide useful insights to the TL.

About Data Operations Team

Data Operations Team performs secondary research online and gathers relevant information about private companies as per the team's methodologies. Each company's information is stored in a profile identified by ProfileID. Profiles are tracked as Private Equity (PE), Venture Capital (VC), Mergers & Acquisitions (M&A), etc. based on the company's backing. On each profile, there are multiple workflows that are worked on by the researchers in the data operations teams. Researchers belong to various research groups that have expertise in understanding details about a company's corporate decisions like fundraising, industry group changes, etc. Each workflow is created by an automated system or by other researchers who find more information about the company. Time taken to complete the workflow is tracked in seconds and the amount of data added to the profile is tracked as benchmark points. Workflows are categorized based on the information that is being tracked e.g. if it is a new profile where the company has raised funding, a New Company workflow is created. If an existing company (in our database) raises money, then a New Round workflow is created, and so on. Workflow is also tagged with the various process types that indicate from which team the data is coming from e.g., news (Post News, News), client request (Special Request), product demo (Demo Update), etc. and the regions from where data is gathered, Greater China, Europe, etc. Each workflow goes through various stages from its creation to closure. As shown below

Sometimes workflows are created with wrong details or on the wrong profile due to which it cannot be worked on. Such workflows are "unassigned" by the team that receives them and is completed by a more relevant team.



Client Details

Client: Team Leader, Data Operations

Reports to: Manager, Data Operations

Daily Tasks:

1. Monitor team's production (i.e., profiles worked on)
2. Understand the workflow (i.e., what workflow should be prioritized)

Weekly tasks:

1. Track individual researcher's performance
2. Understand how workflow is being generated? Are there any gaps? Any inefficiencies?
3. Report production numbers to the manager

Monthly tasks:

1. Analyze team's performance
2. Have meetings with individual researchers to discuss their performance
3. Revise targets for the team
4. Report monthly performance metrics to manager.

Data

Provided along with the case study is sample data that the team leader needs to understand the production and the performance of his/her team.

Profile	Created Date	Secondary Completed Date	Close Date	Most Recent Unassign Reason	Secondary Researcher	Researcher Hire Date	Research Group	Time taken to Complete	Benchmark Points	Workflow Type	Workflow Process	Workflow Status	Workflow Priority	Workflow Region
ProfileID 1	8/30/2021 9:12	8/30/2021 11:08	[NULL]	[NULL]	Researcher 1	7/19/2021	MUM - D - NC/NR	5,684	52	Co Debt - New Company	Secondary	Pend Primary	Regular	North America
ProfileID 2	8/23/2021 0:45	8/30/2021 12:37	9/2/2021 1:11	[NULL]	Researcher 2	7/19/2021	MUM - VC - NC - Training	9,065	57	Co VC - New Company	Secondary	Closed		Asia
ProfileID 3	8/23/2021 0:45	8/30/2021 10:53	8/31/2021 1:11	[NULL]	Researcher 3	5/10/2021	MUM - VC - NC	3,143	52	Co VC - New Company	Secondary	Closed		Asia
ProfileID 4	8/10/2021 7:17	8/10/2021 8:41	8/21/2021 21:33	[NULL]	Researcher 4	2/18/2019	MUM - INV - SEC	4,448	45	Inv VC - New Investor	Demo Update	Closed	High	North America
...

Profile: Unique ID to identify a company profile.

Created Date: Workflow created date

Secondary Completed Date: Workflow secondary research completed date

Close Date: Workflow close date

Most Recent Unassign Reason: The reason provided by the researcher for the most recent unassign on the workflow.

Secondary Researcher: Researcher who completed secondary research on the profile.

Researcher Hire Date: Date when the researcher was hired.

Research Group: Current research group of the researcher.

Time taken to Complete: Time taken for a researcher to complete working on the profile.

Benchmark Points: Benchmark Points (BMP) received by the researcher for that workflow.

Expected output

You are expected to provide a write-up explaining the data and any insights that you can gather from it. You are encouraged to provide visuals and use basic statistics for this purpose.

Requirements:

1. A write-up of your analysis of the data.
2. Please provide any images or graphs as separate files for better readability.
3. Please avoid using jargon while explaining data.
4. For calculations (mean, median, etc.) please explain the purpose and method of calculation.
5. You are expected to solve this on your own, but you are free to use online resources to help you with this case study.