360° HR PERFORMANCE DASHBOARD FOR A MID-SIZED ORGANIZATION IN EXCEL

1. Background and Problem Statement

A mid-sized services company with over 500 employees across departments such as Sales, Finance, Marketing, and Operations was facing challenges in monitoring employee performance, attendance patterns, training status, and attrition trends in one place. Their existing HR systems were fragmented — performance reviews were tracked in Google Forms, attendance in a biometric system, and training data in emails. Senior management lacked a unified and real-time view of workforce productivity and risk indicators. The company needed a centralized, interactive dashboard that could integrate all HR KPIs in Excel to support decision-making.

2. Objectives

- To consolidate performance appraisal scores, attendance data, training records, and attrition metrics into a single Excel dashboard

- To enable department-wise filtering for individual and team-level insights

- To automate flagging of at-risk employees based on performance-attendance-training correlation

- To create dynamic visualizations for leadership reviews and HR strategy alignment

3. Methodology

3.1 Data Sources and Consolidation

- **Appraisal Scores**: Extracted from HR evaluation forms (1–5 scale)

- **Attendance Data**: Pulled from biometric logs (present/absent/duration)

- **Training Records**: Manually updated training sheet (Yes/No with training type)

- **Attrition Logs**: Maintained as monthly exits by department

3.2 Data Preparation

- Cleaned datasets for null values and standardized employee IDs across files

- Created a master sheet combining all records with unique employee identifier

3.3 Dashboard Development in Excel

- **PivotTables** used for aggregating data by employee and department

- **Slicers** added for filtering by department, month, and performance level

- **Conditional Formatting** to flag underperforming and untrained employees with low attendance

- **Form Controls** (dropdown menus) for dashboard interactivity

- **Visuals Included**:

    o Stacked bar chart for department-wise attrition

    o Heat map for attendance trends by employee ID

    o Radar chart comparing performance vs. training for each department

    o KPI cards showing total headcount, attrition %, training coverage, and avg. performance score

3.4 Model Features

- Refresh-ready: new data can be pasted to source sheets for real-time updates

- Alert system: highlights employees who are untrained + poor performers + low attendance

- Export to PDF: print-ready views for leadership meetings

4. Results and Benefits

- **35% reduction in HR review time** by consolidating data from 4 systems into one file

- **Real-time visibility** into team performance and attrition risk

- **Automated identification** of at-risk employees enabled earlier interventions

- **Training effectiveness** improved by correlating performance scores with participation

- Excel-based tool allowed quick adoption by HR team with no new software required

5. Deliverables

- A fully functional .xlsx dashboard file with dynamic filters, charts, and KPIs

- User Guide (PDF): Step-by-step usage and update instructions

- 5-slide summary presentation with charts for leadership review

6. Stakeholder Relevance

Academic:

- Excellent case study for HR analytics, dashboarding, and KPI design

- Useful for Excel training modules in BBA/MBA courses

Corporate:

- Immediate use case for mid-sized firms lacking a full-fledged HRMS

- Reusable template for monthly HR reviews, performance meetings, and training tracking