



## Building Human Capital and L&D Dashboards Webinar

KnowledgeAdvisors  
[www.knowledgeadvisors.com](http://www.knowledgeadvisors.com)

*Driving Results through Learning & Talent Measurement*

### Welcome and Introduction

- Welcome to our webinar:  
“Building Human Capital and L&D Dashboards”
  
- Instructors from KnowledgeAdvisors:
  - Jennifer O’Brien, M.S., Senior Measurement Consultant
  - Dena Fowler, M.S., Senior Measurement Consultant

# Thank You for Joining!

## A Few Housekeeping Items...

- All lines will be muted throughout the call.
- Please use your “Questions” tool to submit questions.
  - Time permitting we will address questions and have an open Q&A at the end of the session.
  - We will also compile answers to all submitted questions and send to all attendees or individuals as appropriate.
- A copy of the presentation will be available after the session.

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## Who We Are - What We Do

### Global Leader in Learning and Human Capital Analytics Solutions

- Thought leadership in analytics
- Collaboration with and validation by industry gurus
  - Jack Phillips, Ph. D
  - Gary Becker, Ph. D
  - Robert Brinkerhoff, EdD
  - Jac Fitz-enz, Ph. D
  - Josh Bersin

Measurement Expertise



- Learning and Human Capital (HC) Analytics focus
- Data collection
- Evaluations
- Tests
- Assessments (360)
- Surveys
- Robust reporting
- Real-time Business Intelligence

On-demand Evaluation Technology



- Integration with LMS and HRIS systems
- Benchmark database of 1 billion data points
- Benchmarks by course type, audience, delivery type, region, and more
- Validate quality, effectiveness, impact, and value of learning

Integrated Analytics Solutions with Benchmarking



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# Organizations Served



# Webinar Objectives and Agenda

## Webinar Objectives

- Develop an understanding of a robust dashboard development process
- Share common best practices for developing a dashboard
- Define key steps to developing KPIs

## Agenda

- Developing a Dashboard Strategy
- Key Performance Indicators
- Identifying the “right” KPIs
- Data Visualization Basics
- Q&A



# Audience Poll

- Why are you here?
  - I don't currently have a dashboard and need help getting started
  - I am currently developing a dashboard and need assistance
  - I currently have a dashboard, but I want to see if there is anything I can add/tweak

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# Core Human Capital Processes

- **Recruiting**
  - Recruit, select, hire
  - Onboard and acculturate
- **Learning & development**
  - Skills development
  - Knowledge management
  - Coaching/ mentoring
- **Talent**
  - Competency assessment
  - Job rotations
  - Mobile workforce
- **Leadership**
  - Succession planning
  - Leadership development
- **Engagement**
  - Employee satisfaction/ engagement
  - Exit interviews
  - Workforce diversity
- **Organization performance**
  - Performance appraisals
  - Development planning



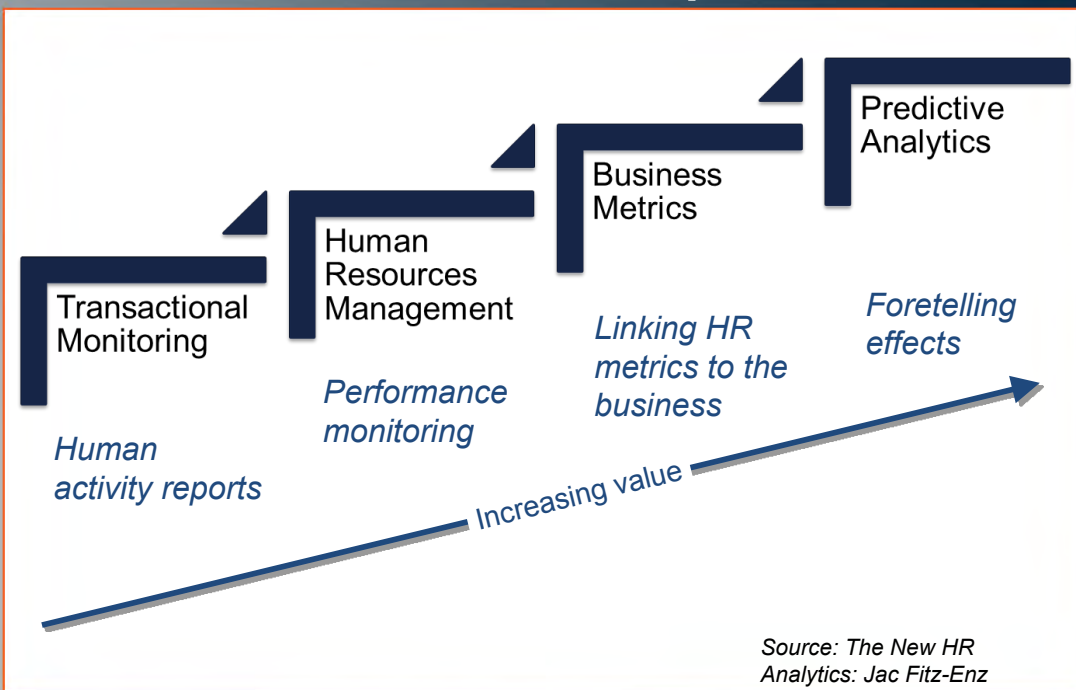
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# Evolution Of Human Capital Metrics



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## Guidelines For Human Capital Measurement

- Measure what matters to the business leaders
- Develop a set of balanced metrics: it's not just about financial data, and don't remove operational data either
- Shift from reporting the past to predicting the future
- Build maturity in the organization: not just in technology and scorecards but in the culture
- Transfer the focus to continuous improvement
- Report data in a manner that speeds time to decisions and actions



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# Why A Reporting/Dashboard Strategy?

- Ensures you report information that is meaningful to each stakeholder group
- Aligns reporting cadence to the business and decision-making cycle
- Ensures stakeholders can use the information for decisions and actions
- Leverages existing resources: data, systems, people
- Minimizes ad hoc reporting



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## Learning Dashboard Strategy

- Objective: Design a dashboard that addresses the specific needs of your organization.

### Phase 1: Characterize the Current State

- Understand Goals and Key Audiences
- Understand what metrics are currently available
- Determine Data Reporting Needs

### Phase 2: Define the KPIs and Process

- Determine Key Performance Indicators (KPIs) for Stakeholder Audiences
- Document Process to Collect, Analyze, & Report Data

### Phase 3: Develop the Implementation Roadmap

- Prioritize Metrics
- Develop Detailed Plan
- Identify Risks, Mitigation Plans

### Outcomes:

- KPIs
- Visual Dashboard Mockup
- Implementation Plan

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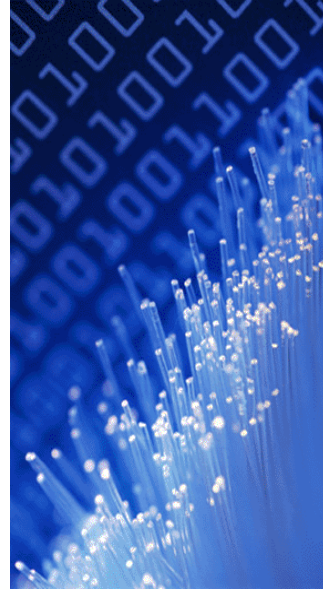
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# Dashboard/Reporting Strategy Components

- **Who** needs to see the data (review your stakeholder analysis)
- **How** does each group want to see the data?
- **What** decisions do they make with this data?
- **How** do they use this information?
- **When** do they need to see it?
- **What** level of granularity is required?
- **What** comparisons are necessary?



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# Understanding The Landscape

To understand your client, you need to do your homework:  
gathering data/ information and conducting interviews

- Gathering information
  - Reports
  - Presentations
  - Studies
- Conducting interviews
  - Key stakeholders
  - Report owners
  - Previous project owners



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# Gathering Information

- About the business
  - The business strategy
  - Business goals
  - Organizational structure
  - Key leaders
  - Recent changes in the organization
- About the HC function
  - The people strategy
  - HC goals
  - Key leaders
  - HC issues
- Reports
  - Business performance
  - HC reports
  - Presentations to key leadership groups
  - Material on a website (internal or external)



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# Who Are Your Stakeholders?

- Definition: Person, group, or organization that has direct or indirect stake in an organization because it can affect or be affected by the organization's actions, objectives, and policies
- Typical stakeholders
  - Key business leaders
  - HC Leaders
  - Operations & IT



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# Conducting Interviews

- Introductions
  - Who you are
  - The project background
  - Why you are interviewing him/her
  - How you will use the information
- The body of the interview
  - Use the interview questions as a guide
  - Don't be too locked in to the questions; be willing to pursue other lines of discussion if necessary
  - If a question isn't relevant, skip it; If another question seems pertinent, ask it
- Wrap up
  - Summarize action items
  - Ask permission to come back if you have questions



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## Interview Guide

Section	Rationale
<b>Section 1:</b> Role/ responsibilities <ul style="list-style-type: none"><li>•Expectations of the function</li><li>•Strategic goals for this fiscal year</li><li>•Business pressures in the function / organization</li></ul>	Gain clarity on the business drivers. Link human capital / talent issues to the business goals
<b>Section 2:</b> Human Capital measurement <ul style="list-style-type: none"><li>•Most critical metrics for today and in the future</li><li>•Data/reports received on these metrics</li><li>•What he/she needs but doesn't get</li><li>•Decisions/actions made based on this data?</li><li>•Quality of the data</li><li>•Enablers to turn data into actionable intelligence</li></ul>	Understand what is measured and how that data is used. Identify the gaps in measurement capability.
<b>Section 3:</b> Human Factors <ul style="list-style-type: none"><li>•Current /desired skills in using HC data</li><li>•Oversight for HC metrics</li><li>•Measurement best practices</li><li>•Key areas that need improvement</li></ul>	Determine the factors that could inhibit the gathering, analysis or use of HC data

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# Stakeholder Reporting Needs #1

This table will be populated based on the stakeholder analysis and your findings from the interviews

Stakeholder	Questions to be answered with the data	Most critical data required	Reports or data sources
VP of Human Capital	<ul style="list-style-type: none"> <li>Is the HR function performing to budget?</li> <li>Is the organization filling key roles?</li> <li>Is it filling them with quality candidates?</li> <li>Is there a high degree of employee engagement?</li> </ul>	<ul style="list-style-type: none"> <li>Actual cost vs budget</li> <li>Key roles designated; % of key roles unfilled</li> <li>Six month performance of new hires in key roles</li> <li>Employee engagement by LOB</li> </ul>	<ul style="list-style-type: none"> <li>Financial reports</li> <li>Open roles report</li> <li>Talent performance distribution report</li> <li>Employee engagement report</li> </ul>

What data is already available based on your analysis?

## Key Performance Indicators

- A Key Performance Indicator (KPI) is a measure of performance
- Used to help organizations define and evaluate its success, typically in terms of making progress towards long-term organizational goals
- KPIs can be specified by answering the questions:
  - "What is really important to different stakeholders?"
  - "What are the main questions they need answers for?"



# Classes Of Metrics

Three classes: Efficiency, Effectiveness and Outcome Metrics

- **Efficiency:** quantity or speed
- **Effectiveness:** quality
- **Outcome:** impact

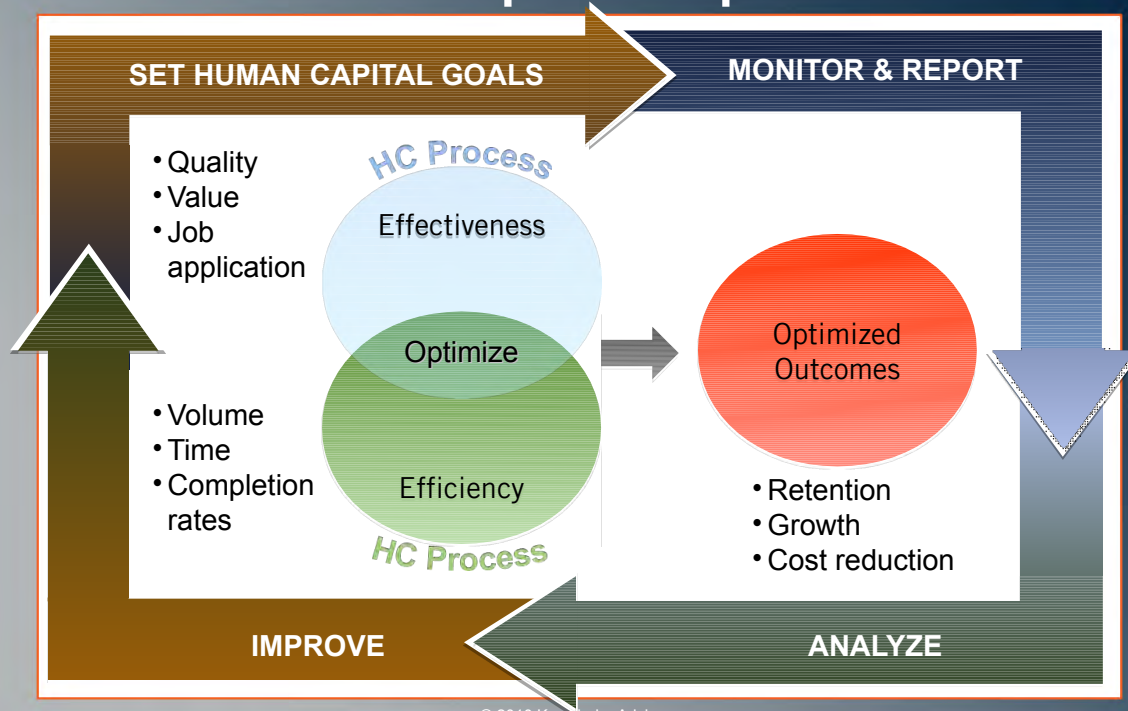
Efficiency + Effectiveness = Positive Outcomes

Situation	Consequence
Efficient but not effective	<ul style="list-style-type: none"> <li>• Poor quality products and services result in low client satisfaction</li> <li>• Poor effectiveness results in a lot of rework which ultimately impacts efficiency</li> <li>• It will not be possible to deliver sustainable outcomes</li> </ul>
Effective but not efficient	<ul style="list-style-type: none"> <li>• Poor efficiency results in services being delayed, long wait time and ultimately, loss in client satisfaction</li> <li>• Poor efficiency drives up costs which can result in staff cuts that affect effectiveness</li> <li>• It will not be possible to deliver sustainable outcomes</li> </ul>

# Efficiency - Effectiveness Measures

Process	Efficiency	Effectiveness
Recruiting	Time to fill	Quality of hire
Learning & Development	# of employees training	% of knowledge to be applied back on the job
Leadership	% of leadership positions filled by succession planning candidate	Leadership effectiveness index
Talent	% of competency assessments completion	% of competency gaps filled
Engagement	% of employees completing engagement survey	% of engaged employees over prior year
Performance	% of on-time performance reviews	% of performance reviews with quality performance plan

# Talent Development Optimization



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## Outcome Metrics

- Employee productivity
- Innovation
- Client satisfaction
- Service quality
- Retention / Turnover
  - Voluntary vs involuntary
  - Desirable vs undesirable
  - Leadership vs all
  - Turnover at 90 days
- Attendance: Absentee rate, sick hours, unused vacation time
- Financial (spend to budget, ROI, value capture)



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## Audience Poll

- What category do you feel like most of your metrics fall into right now?
  - Efficiency
  - Effectiveness
  - Outcome
  - I'm not tracking any metrics



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## Terminology: Lagging And Leading

- Indicator: An indicator is anything that can be used to measure financial or economic trends
- Lagging indicator: capture and summarize the past
- Leading indicator: signals future events; the “drivers” of lagging indicators



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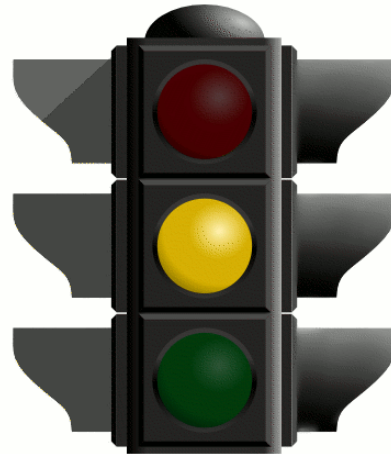
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## Audience Poll

- Are you tracking more leading or lagging indicators currently?
  - Leading
  - Lagging
  - I'm not tracking anything



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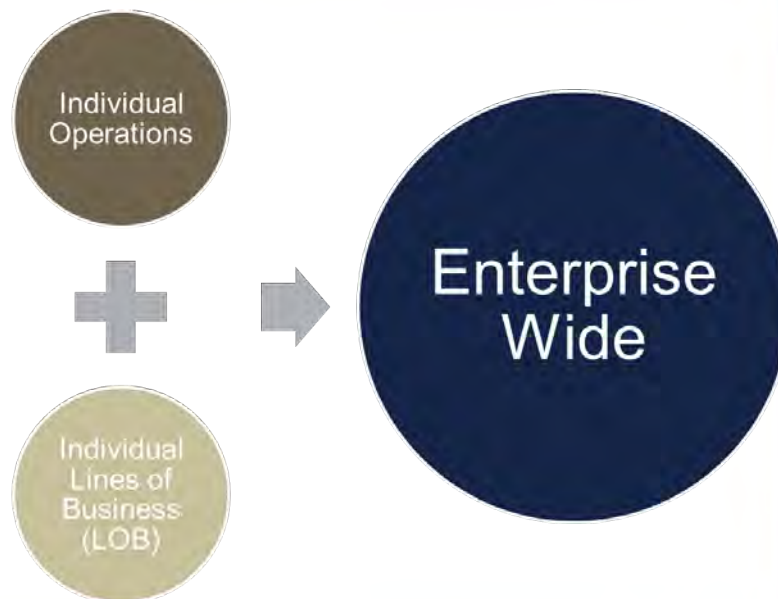
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## Data Reporting Assumptions

KPI's should be devised to be consistent across organization in order to roll-up into Enterprise Wide scorecard but also allow for flexibility at the individual levels.



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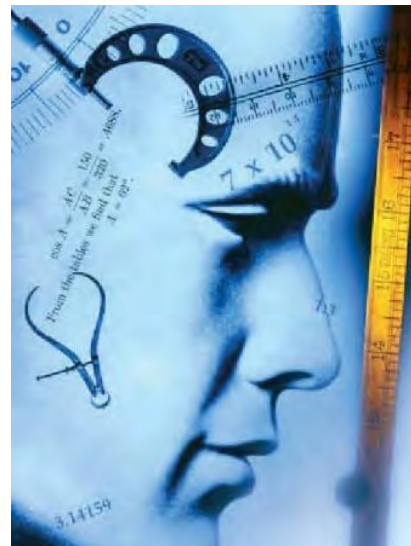
# Prioritize Measures

		Data collection challenge		
		Easy	Feasible	Difficult
Level of criticality of metric to the business	High	1: Definitely collect	2: Worth collecting	2: Worth collecting
	Medium	2: Worth collecting	3: Collect if you have time	3: Collect if you have time
	Low	3: Collect if you have time	3: Collect if you have time	4: Ignore

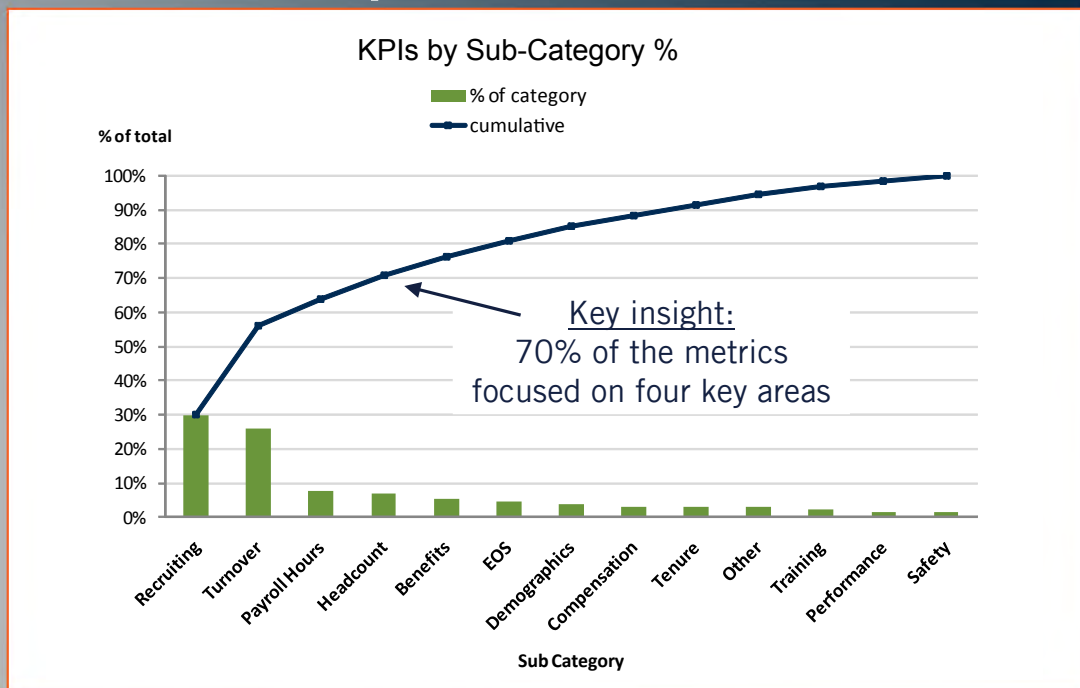
- High = critical to demonstrate tangible outcomes. Typically reserved for strategic, costly or visible programs
- Medium = important to demonstrate outcomes. Helps make tradeoffs among alternative programs
- Low = Stakeholders are not particularly interested in demonstrating outcomes

# Validate The Metrics

- Check for balance of:
  - Strategic vs tactical
  - Efficiency vs effectiveness
  - Leading vs lagging
  - Across HC processes
- Choose the critical few metrics
  - Leaders: 8-10 max overall
  - Process owners: 10-15 per process



# Example: KPIs Collected



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## Considerations in Building a Dashboard

- Consistency of data
- Quality of data
- Where is the data stored?
- Can we get access to the data?
- Are there processes in place to standardize collection of the data?
- Where will we build the dashboard?



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# Link KPIs To The Dashboard Strategy

KPI	Name of Key Performance Indicator
When to begin collection	Short, medium, long term (specific quarter)
Data provider	Name or department
Form of data	Automated report, manual excel spreadsheet
Demographics required	Department, team name, program type
Reporting cadence	Monthly, quarterly, annual, periodic
Accountable for taking action	Name of person
How to visualize the data	Trends, comparison
Benchmarks or goals	Desired performance range

What is the core question this KPI will answer?

# How We Report Data Is Important

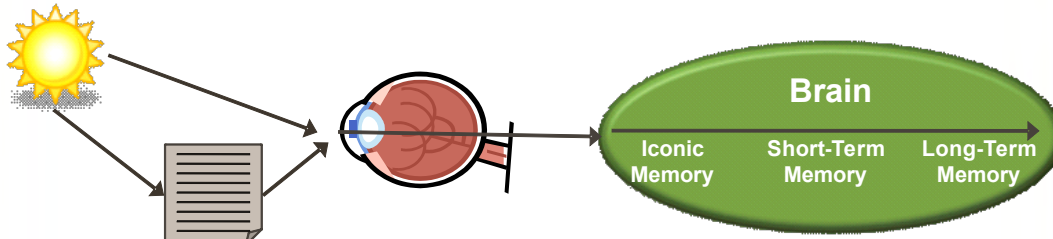
- Information is exploding at an unprecedented rate
- Yet the human brain is limited in its ability to process information and make sense of it:
  - We can only hold 3-4 pieces of information in our heads at one time
  - We don't judge angles, areas or volumes very well
  - We are easily distracted when non-data is present



Design your data displays according to the abilities of viewers to *decode it*.

# Understanding How We Perceive

“The way in which problems are represented has much to do with the quality of the solutions that are found.”  
– Herbert Simon, 1978 Nobel Prize winner in Economics



★ The goal: Move your information from the eyeball into long term memory

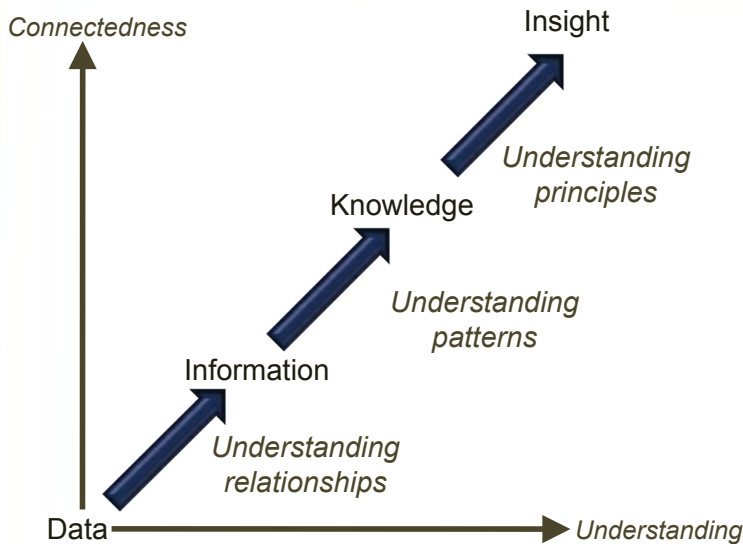
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# The goal: transform data into insights



Your job:

- Create new knowledge
- Spark new connections
- Reduce the time to insight
- Improve decision-making
- Shift the focus from reflecting on the past to peering into the future

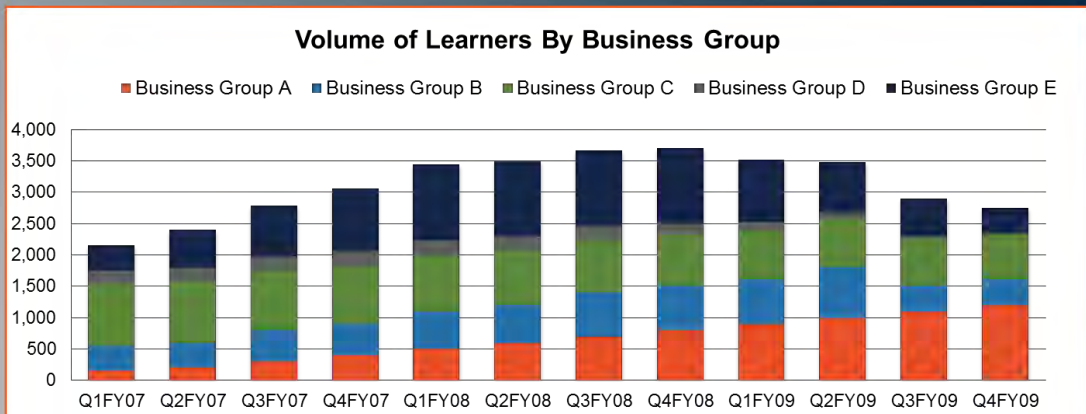
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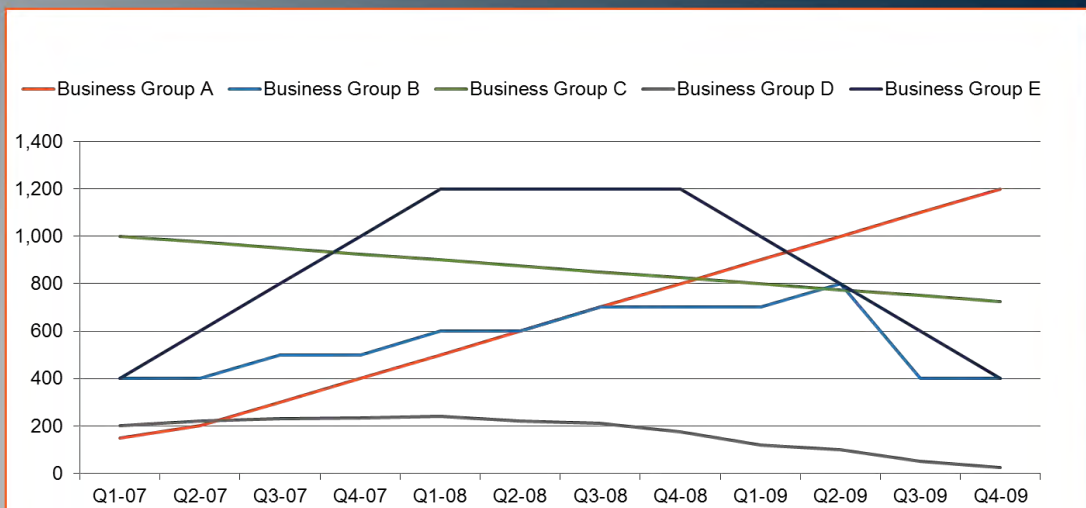
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# What's Wrong With This Chart?



1. How much did volume for Business Group C (orange) change from quarter to quarter?
2. How many times do you have to reference the legend to figure out which color is what label?
3. Is there even a value of Business Group D (grey) after Q3FY09?

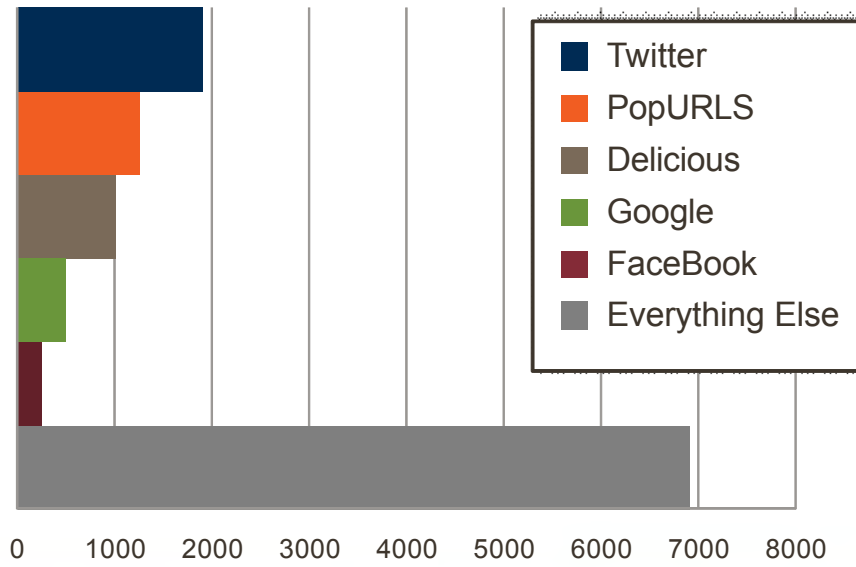
# An Alternative



1. What can you detect with this graphical approach vs the other?
2. Did you realize that Group C was on the decline?

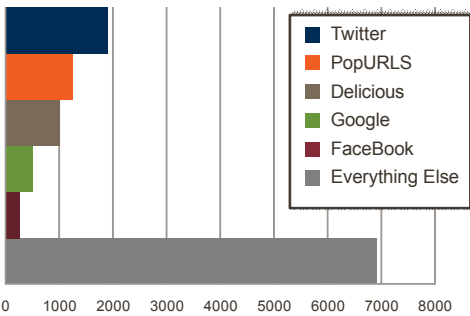
# How can we Improve This Chart

Number of Web Views by Source

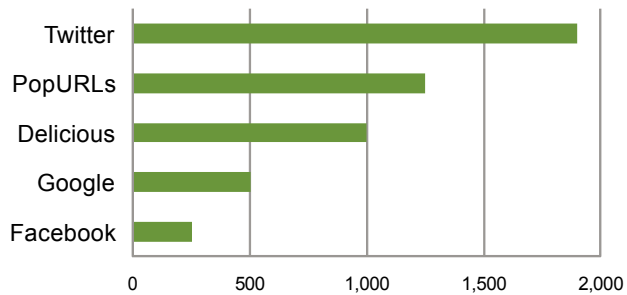


## Possible Alternatives

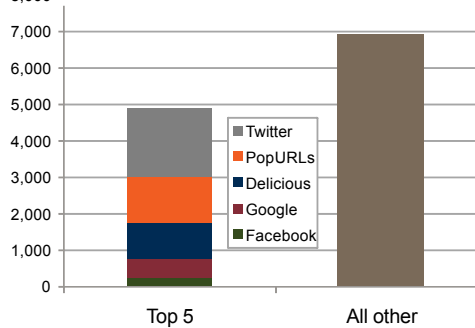
Number of Web Views by Source



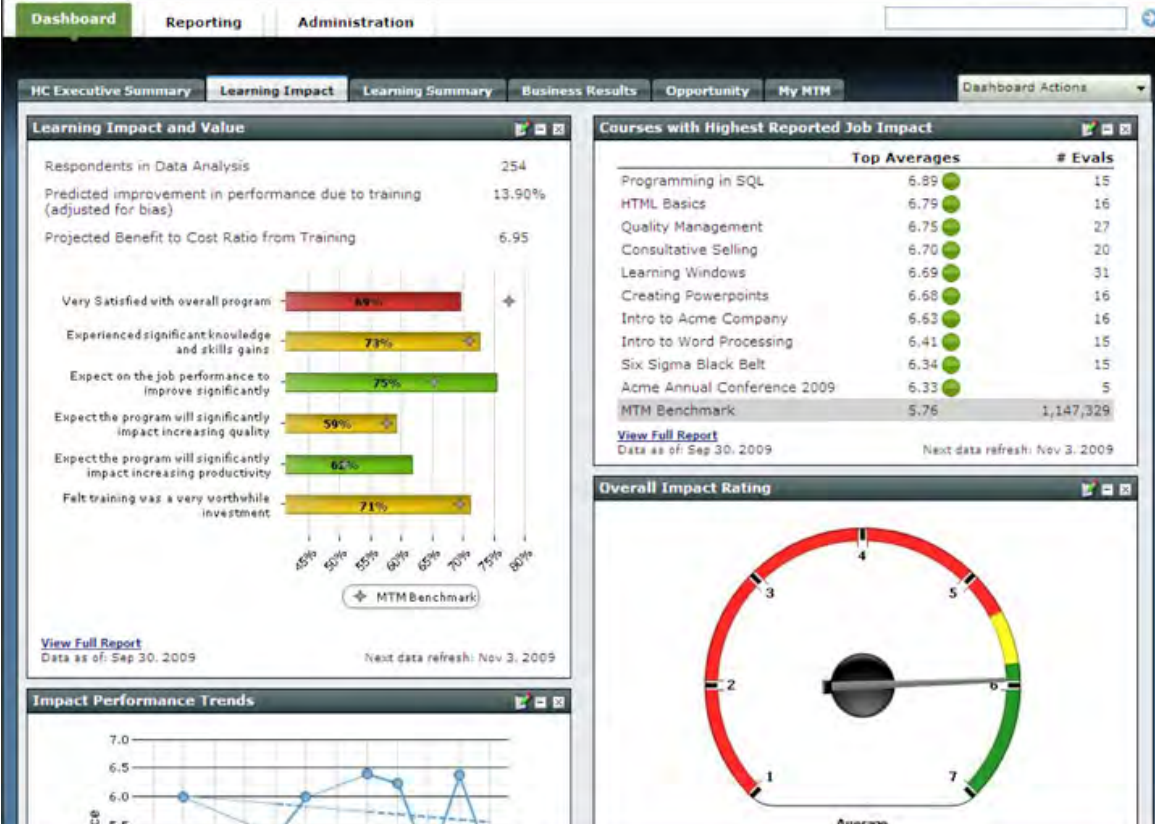
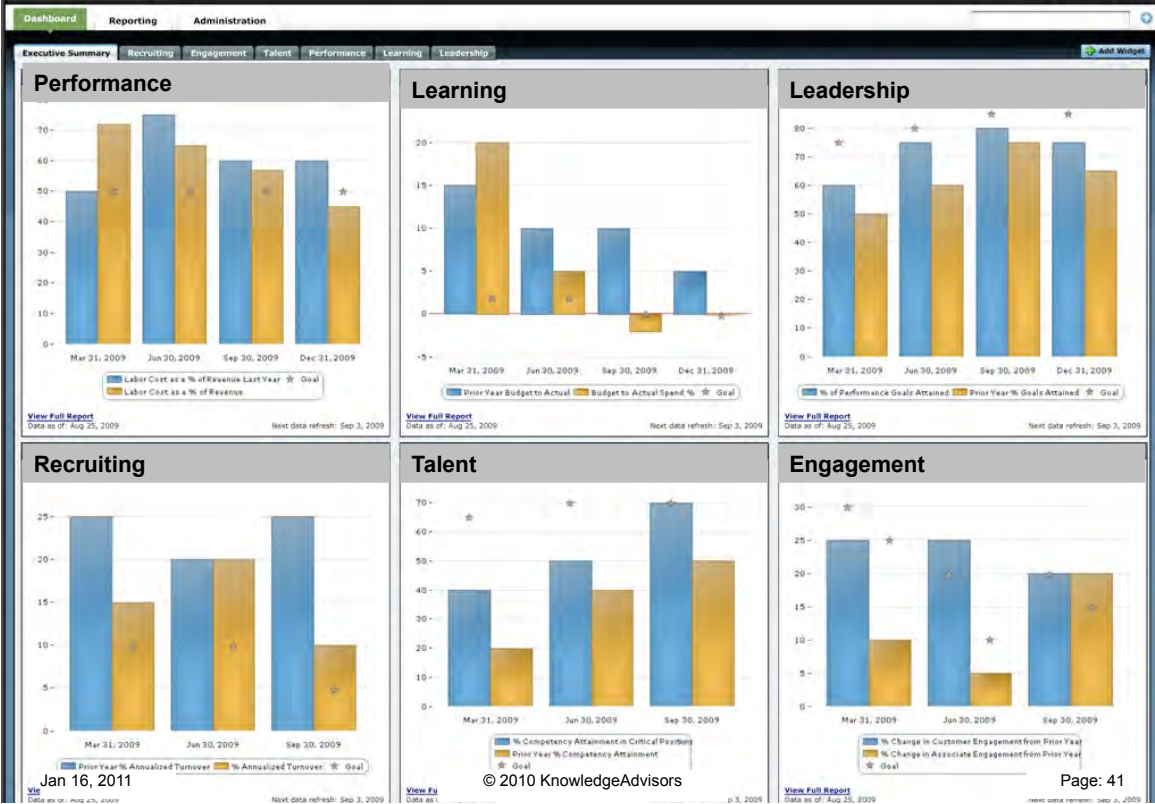
Web views of top 5 social networking sites

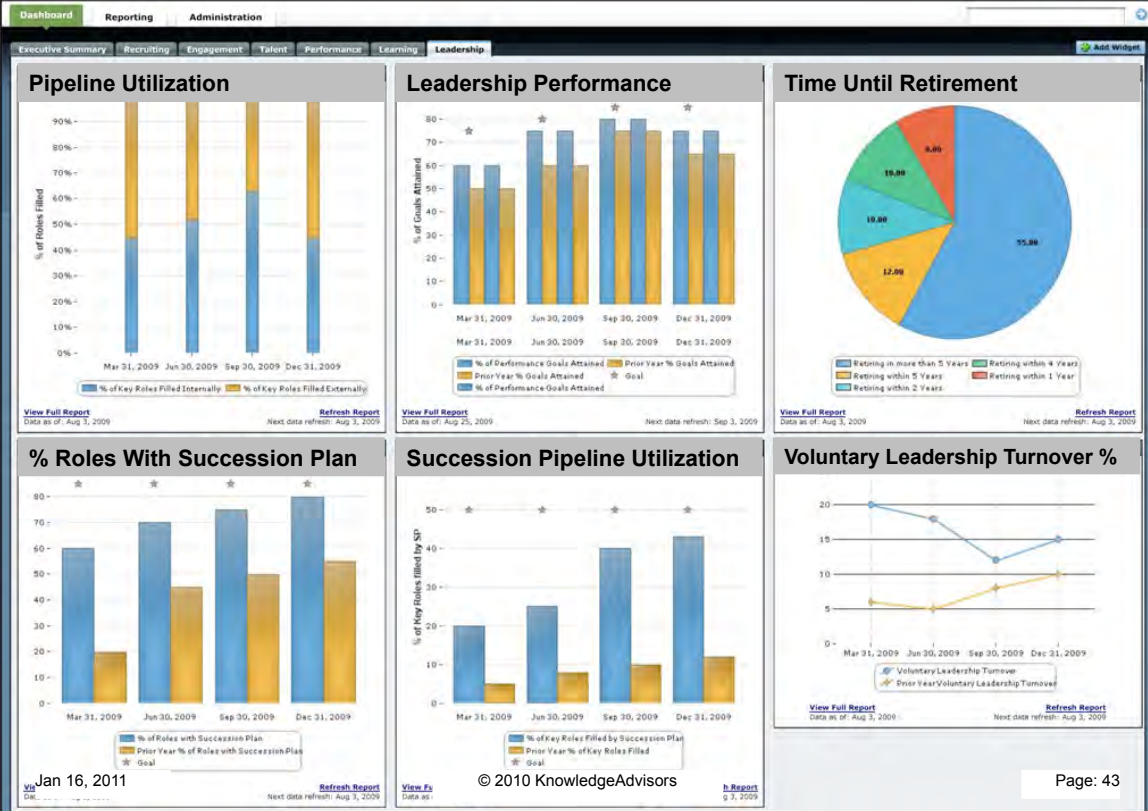


Web views of top sites vs all other



- What is the story you are trying to tell?
- Which graph does it better?





## Table vs. Graph

### A table is best when:

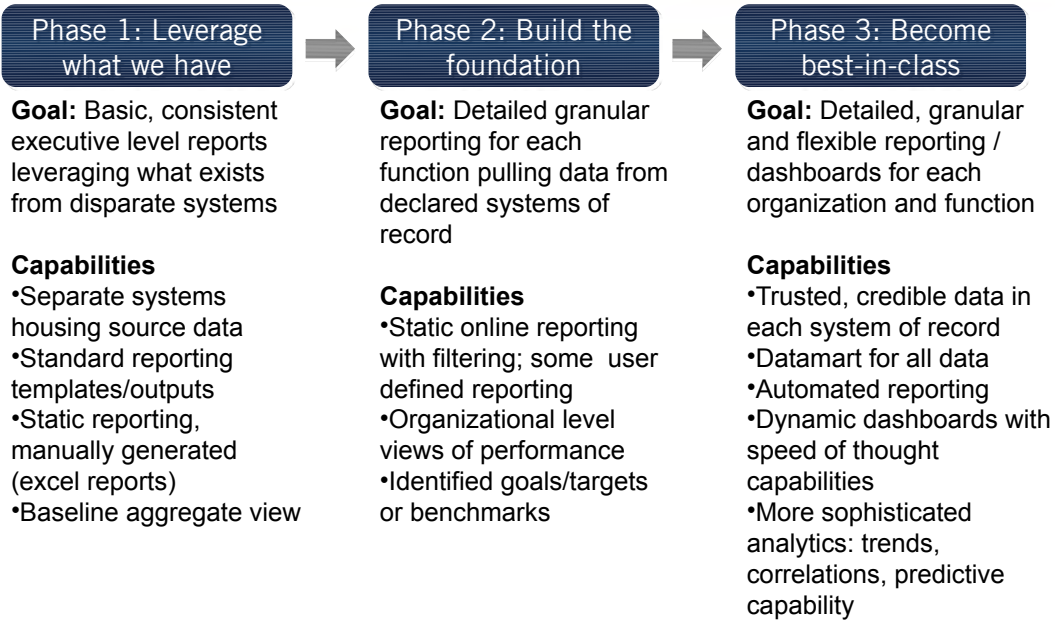
- You need to look up specific values
- Users need precise values
- You need to compare related values (e.g. sales in Q1 vs Q2)
- You have multiple data sets with different units of measure

### A graph is best when:

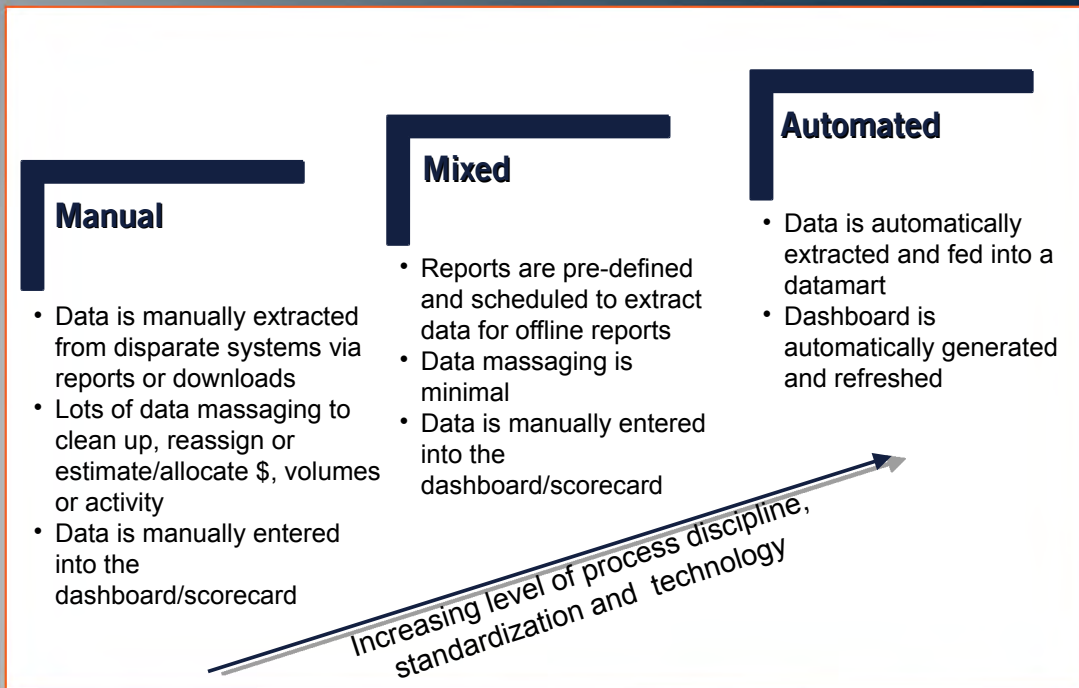
- The message is contained in the shape of the values
- You want to reveal relationships among multiple values (similarities and differences)
- You have large data sets

Graphs and tables serve different purposes. Choose the appropriate data display to fit your purpose. A table may be sufficient

# Dashboard Roadmap



# Automation Maturity



# Questions?



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