



Case Study ♦ Large Retail & Corporate Bank

Reporting and Dashboarding

Bank Employee Analytics



Comprehensive BI data views: Personal data view, Line manager view, Organisational view



Structured and controlled process for “democratised” data correction



Improved organisation awareness of personal data quality



Overview

Accurate and up-to-date employee data is highly valuable as it not only enables banks to extract meaningful internal MI insights - including a comprehensive organisational structure - but also has regulatory compliance implications. In this regard, one of our banking clients tasked Monocle with facilitating the improvement of data quality and oversight of their employee data that had chronically suffered from incomplete and inaccurate records.

The driving principle behind Monocle’s solution was the democratisation of data, whereby “the people most familiar with a given set of data are the best positioned to identify and correct errors therein”. As such, Monocle designed and developed an internal report that could share captured personal data directly with the employee and provide actionable pathways for correction, while adhering to strong data management principles such as security and access management to protect the sensitive personal data. Furthermore, the internal report consisted of a line manager and organisational view to provide management with broad insights into their respective teams and the firm as a whole.

The project began with an analysis of the existing employee data landscape, followed by the design of a Power BI-based solution consisting of a custom-built data model, which supports the various BI data views. Furthermore, a structured data alteration and correction process was designed so that the individual employees of the bank could review and correct their personal data. A significant portion of the project was dedicated to the visual design of the reports and their views to ensure the data could be consumed and interpreted easily. Therefore, once the data and business requirements were understood and a security framework was established to manage data access, an intensive process of stakeholder and end-user testing and feedback was initiated to establish the visual design, layout, and format of the internal reports and views.

The project’s benefit was immediately achieved as testing began, with unforeseen errors in personal and organisational data being identified upfront and proactively corrected before the official roll-out of the solution to bank employees.

Solution

- A Power BI solution for mass distribution, validation, and correction of sensitive personal data and MI views, with row-level security and structured processes for data alteration.

Insights

- Due to the high volume of employee data attributes, careful consideration must be made regarding dashboard design – through a strong understanding of visual design principles – in order to create useful and accessible data views.
- The democratisation of data correction – whereby employees are responsible for identifying and updating errors or gaps in their personal information – can be beneficial when staff are empowered to update this data easily.

Key Skills Required

- Due to mercurial UI requirements and a highly flexible scope, consultants should be able to provide a quick turnaround on iterative deliverables.
- Due to the sensitive nature of the data, the solution should prioritise the appropriate access and security of the data.
- Visual design literacy and UI expertise are critical to ensure accessible data views that communicate insights effectively.

Banking Area

- Human Capital/Resources

Skill Sets

- Data ETL
- Power BI
- SQL
- UI and Report Design

Themes

- Personal Data
- Row-Level Security
- Employee Data
- Data Quality



“The report gives a great picture of the team and its composition. It will be helpful in picking up discrepancies in the information and rectifying them.”

- Business Technology Team Lead

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