Workday People Analytics

Product Summary

May 2023

This content is not part of the Workday Administrator Guide and is subject to further change.

Contents

VIBE Index in People Analytics

Concept: VIBE Index in People Analytics

VIBE™ stands for Value Inclusion, Belonging, and Equity. The VIBE Index topic area in Workday People Analytics surfaces key outcome metrics showing where you can improve equity and parity across all people groups (intersections). These insights help you to set, achieve, and renew goals that cultivate belonging and diversity in your workplace.

VIBE Maturity Model

To help organizations assess their progress and move forward in cultivating belonging and diversity, Workday developed the VIBE Maturity Model. The model consists of 3 stages. Each stage represents a VIBE Score range.

Stage	Description	VIBE Score Range
Commit	Set strategy and define commitments.	0 - 1
Drive	Identify drivers and develop best practices.	2 - 3
Thrive	Achieve and renew goals.	4 - 5

Outcome Scores

To determine the VIBE Score for your organization, we calculate outcome scores and group scores. Outcome scores identify areas where you can improve parity across all intersections in each metric.

Metric	Description	Calculation Time Frame
Attrition	Number of terminations within rolling period.	Depending on your data history: • 12 months, or • 3 months.
Belonging	Number of workers with a positive belonging sentiment within period.	Last Peakon scores for the belonging questions up to 12 months back.
Hires	Number of new hires within rolling period.	Depending on your data history: • 12 months, or • 3 months.
Leadership	Number of workers in leadership roles at end of period.	Current snapshot period
Promotions	Number of promotions within rolling period.	Depending on your data history: • 12 months, or • 3 months.

An outcome score is the total number of successes for an outcome metric, scaled to align with the VIBE Score range.

Group Scores

Group scores identify opportunities to improve parity across all outcome metrics in each intersection. A group score is the total number of outcome metric successes for a given intersection, scaled to align with the VIBE Score range.

The intersection you include in your field-mapping configuration of People Analytics determines the intersections we include in the VIBE Index.

Successes

When you meet or exceed the parity benchmark for an outcome metric (excluding Attrition), we consider it a success. Successes determine the group and outcome scores.

High attrition can negatively affect an organization, so we flag attrition as below parity when the representation is above the comparison point.

Intersections

An intersection is a group that consists of workers with various demographics and characteristics. An intersection is a field or a group of fields that represent the dimensions you want to analyze in the VIBE Index.

We recommend that you use a minimum and maximum of 2 fields to define your intersections.

Examples of fields used to define an intersection: Ethnicity, Gender, Disability Status, Veteran Status, Sexuality.

Example of an intersection: Gender and Ethnicity.

The values of the fields you use to define the intersection determine the intersection values. Each intersection value is an individual intersection (people group).

Example: You define a Gender and Ethnicity intersection. The intersection includes these values [people groups]:

- Female - Asian
- Female - URM
- Female - White
- Male - Asian
- Male - URM
- Male - White

Parity

Parity means that different groups get equal, favorable outcomes while incorporating contributing factors. Demographic parity is a measure of fairness indicating that the difference in favorable outcomes between groups is zero.

Example: We reach pay parity between men and women when both groups achieve equal pay after accounting for contributing factors such as job title, industry, education, and experience.

Parity Matrix

The Parity Matrix displays each intersection as the comparison point against the proportional values of all outcome metrics. When an outcome metric is at or above parity, we consider the outcome metric a success. An outcome metric is considered below parity when it falls below the representation for an intersection, except for Attrition.

High attrition can negatively affect an organization, so we flag attrition as below parity when the attrition value for an intersection is above the comparison point.

Filters

This topic area only includes the Organization Level Hierarchical filter type.

Related Information
Concepts
Concept: Filtering in People Analytics on page 8

Concept: Belonging in the VIBE Index

Note: The Belonging metric is only available for Workday Peakon Employee Voice customers who have opted into the VIBE Index.

Belonging refers to an employee's sense that they're an accepted member of a group or team. Employees express their sense of belonging by completing Workday Peakon Employee Voice surveys. Their answers determine their individual Belonging score that is measured against a threshold. If an employee's score **exceeds 8** on a scale of 0 - 10, we consider their sense of belonging to be **above** the threshold for positive sentiment. The Belonging outcome score contributes to the VIBE Score for your organization.

You can manage your Peakon data in People Analytics by using the Employee Sentiment topic of interest in the **Configure People Analytics** report, where you can select questions for your belonging surveys. You can only use standard Peakon questions to measure Belonging. If you select only 1 question, the resulting Belonging score is the latest score per employee from the past 12 months.If you select more than 1 question, the resulting score is the average of the latest scores per employee from the past 12 months, for each question.

For each monthly People Analytics update, Workday uses the latest employee scores available.

To prevent reporting on a nonrepresentative worker population, Workday measures Belonging outscore score for organizations where:

- **At least 20%** of workers have participated in Workday Peakon Employee Voice surveys over the past 12 months
- There are **at least 10** such workers.

Example: this means that an organization of 100 employees would require at least **20** participants to measure the Belonging outcome score. In an organization of 40 active employees, 8 responders meet the 20% requirement, however, at least **10** responders would be necessary to measure the score.

If the conditions aren't met, the Belonging column doesn't appear on the VIBE parity matrix.

Related Information
Reference
2022R2 What's New Post: VIBE Index for Workday Peakon Employee Voice
Configuring the diversity and inclusion questions

Concept: Calculating the VIBE Score

The VIBE Score™ is the arithmetic average of the overall outcome score and the overall group score. The VIBE Score indicates which stage of the VIBE Maturity Model the organization is currently in.

To calculate individual and overall outcome scores and calculate individual and overall group scores, we first calculate the:

- Representation for each intersection.
- Parity View for each intersection and outcome metric.
- Parity Benchmark for each intersection.
- Parity Definition for each intersection and outcome metric.

Representation

Representation is the percentage of active headcount in each intersection at the end of the period. Representation is the parity benchmark that drives the scoring in the VIBE Index.

Formula: Representation of [Intersection] = (Active headcount for intersection at end of period / Total active headcount at end of period) * 100

Example: Representation of Female - White = (2000 / 8600) * 100 = 23.3%

Parity View

The Parity View is the proportional value of a given outcome metric for a given intersection.

Formula: Parity View for [Outcome Metric] in [Intersection] = (Metric Total for Intersection / Metric Total) * 100

Example: Parity View for Promotions in Female - White = (400 / 1593) * 100 = 25.1%

Parity Benchmark

The Parity Benchmark for a given intersection is the level of success in percent for all outcome metrics after incorporating the default threshold of 3%.

The threshold sets the acceptable range by which we can score an intersection as a success for a given outcome metric. The default threshold of 3% relaxes all success criteria by 3%.

Formula for most outcome metrics (Hires, Leadership, Promotions, Belonging): Parity Benchmark for [Intersection] = Representation * (100 - Threshold) / 100

Example: Parity Benchmark for Female - White = 23.3 * (100 - 3) / 100 = 22.6%

Formula for the outcome metric Attrition: Parity Benchmark for [Intersection] = Representation * (100 + Threshold) / 100

Example: Parity Benchmark for Female - White = 23.3 * (100 + 3) / 100 = 24.0%

Parity Definition

The Parity Definition states whether or not a given outcome metric is a success for a given intersection.

To determine the parity definition for most outcome metrics (Hires, Leadership, Promotions, and Belonging), we compare the parity view to the parity benchmark for the intersection. 1 is a success, zero is below parity.

Formula for most outcome metrics (Hires, Leadership, Promotions, Belonging): Parity Definition of [Outcome Metric] for [Intersection] = IF ((Parity View) >= (Parity Benchmark) , 1, 0)

Example: Parity Definition of Promotions for Female - White = IF (25.1 >= 22.6, 1, 0) = 1

For Attrition, we compare the attrition parity view to the parity benchmark for attrition. 1 us a success, zero is below parity.

Formula for the outcome metric Attrition: Parity Definition of Attrition for [Intersection] = IF ((Attrition Parity View) <= (Parity Benchmark for Attrition), 1, 0)

Example: Parity Definition of Attrition for Female - White = IF (18.8 <= 24.0, 1, 0) = 1

Outcome Scores

An outcome score is the total number of successes for a given outcome metric, scaled to align with the VIBE Score range.

The raw outcome score is the sum of the successes of all intersections minus 1.

We subtract 1 from the sum because the outcome metric parity view for at least 1 intersection must always be at or above the intersection representation (for attrition, at least 1 intersection must always be at or below the intersection representation). Subtracting 1 also resets the scale of the score to have a minimum of 0 to be consistent with the VIBE Score range.

If the parity view for a given outcome metric is unattainable, we don't calculate the outcome metric score and we exclude the metric from the VIBE Score calculation. As a result, the Outcome Scores card doesn't display the excluded outcome metric and the Parity Matrix displays a dash for all intersections in the corresponding outcome metric column. Example: If there were no terminations in the last 12 months, the outcome metric Attrition is unattainable. Therefore, we don't include the outcome metric Attrition in the VIBE calculation.

Formula: Raw Outcome Score for [Outcome Metric] = SUM ((Success Count Intersection 1), (Success Count Intersection 2), (Success Count Intersection 3), ...) - 1

Example (for 5 intersections): Raw Outcome Score for Hires = SUM (1 + 1 + 0 + 1 + 1) - 1 = 3

Scaling the raw outcome score ensures that each outcome score is on a scale of 0 - 5 to align with the VIBE Score range.

Formula: Scaled Outcome Score for [Outcome Metric] = (Raw Outcome Score) * (5 / ((Number of Groups) - 1))

Example (continued): Scaled Outcome Score for Hires = 3 * (5 / (5 - 1)) = 3.75

Group Scores

A group score is the total number of outcome metric successes for a given intersection, scaled to align with the VIBE Score range.

Formula: Raw Group Score for [Intersection] = SUM ((Attrition Parity Definition), (Hires Parity Definition), (Leadership Parity Definition), (Promotions Parity Definition), (Belonging Parity Definition))

Example: Raw Group Score for Female - White = SUM (0 + 1 + 1 + 0 + 1) = 3

Scaling the raw group score ensures that each group score is on a scale of 0 - 5 to align with the VIBE Score range.

Formula: Scaled Group Score for [Intersection] = Raw Group Score * (5 / (Number of Outcome Metrics))

Example: Scaled Group Score for Female - White = 2 * (5 / 5) = 2

VIBE Score

The VIBE Score ranges from 0 to 5 and is the arithmetic average of the overall outcome score and the overall group score.

The VIBE Score is sensitive to the magnitude of the group and outcome scores and the variance among these scores. This means that the VIBE Score is higher when intersections have higher group scores, outcome scores are higher, and there's less overall variance among group scores and among outcome scores (greater equity).

To get the overall outcome score or the overall group score, we add 1 to each individual score. This prevents multiplication by a value that is less than 1. We then multiply the individual scores and subtract 1 from the resulting value. This sets the score on a scale of 0 - 5 to align with the VIBE Score range.

Formula: Overall Outcome Score = (PRODUCT ((Each Scaled Outcome Score) + 1)) ^ (1 / (Number of Outcomes)) - 1

Example: Overall Outcome Score [Hires, Promotions, Leadership, Attrition, Belonging] = ((3 + 1) * (3 + 1) * (1 + 1) * (2 + 1) * (3 + 1)) ^ (1 / 4) - 1 = 2.29

Formula: Overall Group Score = (PRODUCT ((Each Scaled Group Score) + 1)) ^ (1 / (Number of Intersections)) - 1

Example: Overall Group Score [Female - Asian, Female - URM, Female - White, Male - Asian, Male - URM, Male - White] = ((3.75 + 1) * (2.5 + 1) * (2.5 + 1) * (2.5 + 1) * (1.25 + 1) * (5 + 1)) ^ (1 / 6) - 1 = 2.74

The arithmetic average of the overall outcome score and the overall group score is the VIBE Score for your organization.

Formula: VIBE Score = AVG ((Overall Outcome Score) , (Overall Group Score))

Example: VIBE Score = AVG (2.29, 2.74) = (2.29 + 2.74) / 2 = 2.52

Concept: Skills in People Analytics

Skills Cloud is a machine-learning-powered remote collection of skills for workers and candidates to select from. You can use Skills Cloud to build qualification requirements and easily track worker capabilities.

Workday brings the power of Skills Cloud to People Analytics through a new Skills topic area. With People Analytics and Skills Cloud, you can better understand what skills your workforce has with visualizations of top skill categories for management levels and job families. The Skills topic area in People Analytics also helps you identify your workforce's largest skill gaps and helps you prioritize the best opportunities to upskill workers, with the introduction of a worker Gap Score and Match Score.

The Gap Score is 1 minus the Match Score for a worker. Match Score is a calculation that compares a worker's current portfolio of explicit and inferred skills to the skills (explicit and inferred) listed on their job profile. Workday calculates the skill gaps and subtracts the total from 1 to assign each worker a score on a scale of 0 - 1. Lower match scores indicate opportunities for workers to invest in achieving the expected skills of their role. High match scores indicate that the workers have the expected skills of their role. Match Score utilizes Skills Cloud skills and not tenanted skills.

Workday also assigns each worker a Match Score Signal to indicate where on the Match Score Scale a worker falls.

Match Score Signals

Match Score Signal	**Definition**
0 Score	Equal to 0.
Low	Greater than equal to 0 and less than or equal to 0.06.
Fair	Greater than 0.06 and less than or equal to 0.22.
Good	Greater than 0.22 and less than or equal to 0.45.
Strong	Greater than 0.45 and less than or equal to 1.

The **Detailed Data** tab shows the Match Score Signal for each worker.

Concept: Filtering in People Analytics

When you view the **People Analytics** report, Workday automatically filters the analysis Storyteller performs each month and displays prioritized insights on each topic area by default. However, you can use the filter panel on the left side of the report to view additional stories and key metrics from the analysis, or to focus on insights related to specific dimensions. Example: You can view attrition for different areas of your business by filtering by region.

The filter panel displays the filters available on each topic area. When you add or remove a filter value, Workday immediately refreshes the KPIs, stories, and visualizations displayed.

Your People Analytics configuration determines what displays in the filter panel. Your People Analytics administrator determines:

- Which filters are available in the filter panel.
- The field mapped to each filter.
- The display name of each filter.

Workday enables up to 6 filters total, from a total of 2 groups. The filters in a group come from different levels in a hierarchy, either the primary or secondary hierarchy. Typically, the filters in the primary hierarchy are mapped to levels in Supervisory Organization, and the filters in the secondary hierarchy are mapped to levels in a geographical hierarchy. Alternatively, your administrator might map fields that represent levels in Cost Center to either hierarchy.

The People Analytics application doesn't indicate which hierarchy a filter is from, but the top 3 filters come from the primary hierarchy, and the lower filters come from the secondary hierarchy.

Example: You might have these filters:

Filter Display Name	**Notes**
Org Level 2	By default, this is the second level in the configured organization, typically a level in Supervisory Organization.
Org Level 3	By default, this is the third level in the configured organization, typically a level in Supervisory Organization.
Org Level 4	By default, this is the fourth level in the configured organization, typically a level in Supervisory Organization.
Region	Region represents the top-most level of a geographical hierarchy. This filter isn't available on the VIBE Index topic area.
Country	Country represents the middle level of a geographical hierarchy. This filter isn't available on the VIBE Index topic area.
Location	Region represents the lowest level of a geographical hierarchy, usually associated with the worker. This filter isn't available on the VIBE Index topic area.

The field mapped to each filter might be associated with a worker or a job requisition, depending on which topic area you're viewing in the application.

The values available in a filter are based on:

- The field mapped to the filter.
- Your security permissions on the values in the field.

Note: If your People Analytics administrator enforces constrained security on the application, then you might not have permission to view all prioritized insights that display on a topic area by default. Workday prepopulates filters on the filter panel for constrained users to display prioritized insights based on their security permissions.

Using Multiple Filters

You can select more than 1 filter when viewing a topic area. You can select multiple filters from the same hierarchy or from different hierarchies.

However, Workday applies the filters differently to the content depending on:

- From which hierarchy the filters come.

- The type of content, such as viz or story.

Multiple Filters	Vizzes	KPIs	Stories
From different hierarchies	Workday applies all filter values to the viz data.	Workday applies all filter values to the KPI data.	Workday applies only 1 filter to the stories. To ensure top stories results when using filters, use filters from only one hierarchical filter type at a time.
From 1 hierarchy only	Workday applies all filter values to the viz data.	Workday applies only 1 filter to the data in the KPIs. Example: You select both San Francisco and Pleasanton for the Location filter. Workday displays data in the KPIs for either San Francisco or Pleasanton, but not both locations.	Workday applies all filter values to the stories.

Related Information
Concepts
Concept: Storyteller Engine on page 12

Concept: Export and Download Options in People Analytics

You can export and download insights from the **People Analytics** report to use for presentations, discovery boards, and other resources for further analysis.

Note: The Export to Discovery Board and Export to Workday Slides options require access to these features. Contact your administrator for support.

Option	Content	Action
Download as PNG	Visualizations	On a visualization, select the related actions menu > **Download as PNG**. Workday generates the PNG file and saves it to the directory configured in your browser. The filename is the visualization name.
Export to Discovery Board	Detailed Data for a KPI or a story	On a KPI card or story card, select **View more** to access the **Detailed Data** tab. Select the **Detailed Data** tab > related

Option	Content	Action
		actions menu > **Export to Discovery Board**.
Export to Workday Slides	KPI content or story content and associated trend chart Visualizations	On a KPI card, story card, or visualization, select the related actions menu > **Export to Workday Slides**. On a KPI card or story card, select **View more**. Select the related actions menu > **Export to Workday Slides**. The Export to Workday Slides option does not export content from the **Detailed Data** tab. Use the Export to Discovery Board option to export detailed data.

Related Information
Concepts
Concept: Export and Download Options in People Analytics on page 10

Concept: Providing Feedback on Story Quality

As a data product governed by the Innovations Services Agreement, People Analytics relies on user input and feedback to increase the quality of stories. People Analytics includes a feedback mechanism that securely collects individual feedback and reduces the need for offline surveys or extensive feedback sessions.

If you experience issues with the product or need immediate attention, file a customer support ticket instead of using the in-app feedback mechanism.

Feedback Process

You can give Workday feedback on the quality of a story by clicking the thumbs up or thumbs down icon on a story card. The contextual feedback helps People Analytics identify specific aspects of the story that need improvement. After you submit feedback, the thumbs up or thumbs down icon remains highlighted. You can see what feedback you submitted, but you can't edit or resubmit feedback. People Analytics resets feedback icons weekly so you can submit new feedback for each story.

Feedback Data Privacy

Submitting feedback is optional and is opt-out by default. Even after you click the thumbs up or thumbs down icon, you can decide not to submit feedback by closing the feedback window.

For each story, the same set of feedback reasons displays to all users when you select the thumbs up or thumbs down icon. People Analytics doesn't capture or solicit any personally identifiable information. Workday only views feedback reasons in aggregate and uses the data to:

- Improve storyteller engine algorithms.
- Track story quality.

Concept: Storyteller Engine

People Analytics uses an automated analytical engine called Storyteller that:

- Searches millions of combinations of data.
- Makes connections between the combinations of data.
- Surfaces the most significant results in the form of stories.

A story is a finding in the data that addresses a business question. Example: What are key turnover trends?

Each story describes an instance of significant under- or overperformance in a metric, along with a combination of dimensions, trends, and drivers that contribute to the finding.

Storyteller uses statistical and heuristic methods to determine the ranking of stories and which stories should surface after performing one of these comparisons:

- Comparison to historical performance - Storyteller surfaces these stories when the engine detects a significant variance between the current performance of a metric against historical performance. The look-back period is usually 12 months if you have at least 13 months of data history in People Analytics, or 3 months if you have less than 13 months of data history. However, the look-back period might vary depending on the metric.
- Internal peer group comparison - Storyteller compares current performance in a given organization or location (region, country, or other location) against the performance of peers within the company and surfaces significant gaps as stories. Depending which level the story is on, the peer group changes. Storyteller might make the comparison at the company or region level, or at a different level in the hierarchy. By comparing performance to the closest peers in the same organization or region, Storyteller can identify stories that provide insights which are actionable and meaningful in relation to the dimension where the story takes place. Examples:
  - For a story on FP&A suborganization in Finance at Level 3, the Storyteller engine compares performance of this dimension against the performance of the parent organization Level 2 (instead of comparing to the performance of Level 1).
  - For a story in Canada, Storyteller identifies stories by comparing performance in Canada against performance at the region level, such as North America or the Americas.

Automatic Filtering

To help ensure the highest quality of insights, Storyteller automatically filters out stories where:

- The population size is 5 or less people.
- There is no active headcount for 1 or more months that are included in the story analysis. This filtering only applies to stories in these topic areas:
  - Diversity and Inclusion
  - Organization Composition
  - Retention and Attrition
  - Talent and Performance

  Example: A story on a Female Diversity Trend where there is no active headcount for 1 or more of the 12 months analyzed.

  Example: A story on a Female Diversity Gap where there is no active headcount for the month analyzed.

Related Information
Reference
FAQ: People Analytics on page 48

The Next Level: People Analytics: Storyteller Deep Dive
Workday Community: Generally Available Innovation Services – Descriptions and Exhibits

Concept: Trends, Gaps, Top Drivers, and Detailed Data

You can click **View More** on a KPI or story card to view a metric as it changed over time, underlying drivers, and additional details about it.

Trends and Gaps

A trend in People Analytics demonstrates how a metric changed over time. The amount of data history you have in People Analytics determines the number of months used for comparison in the trend. Example: Reviewing performance in Canada over the period of 12 months.

Trend stories compare the current performance trend to the performance trend at the beginning of the historical period.

Gap stories compare the current performance trend with the performance of an internal peer group. Example: Comparing current performance in Canada to the current performance of the Americas.

Top Drivers

The storyteller engine surfaces top drivers of a metric by slicing the metric by different dimensions. Examples: Ethnicity, generation, location, or management level.

The Top Drivers tab on a story card displays dimensions:

- Contributing to the performance gap in the story.
- Driving the story in the opposite direction.

Tables underneath the dimensions display personalized insights for each top driver, using conversational language to convey key information. Example: Female Representation in this **Tenure Category** is **64.3%** — which is **18.7** percentage points above **Cost Center 1**. Top drivers display by the severity of their impact on the story: from High to Low.

The change in metric, population size, and historic trend (for trend business questions) determine the impact level. **High** impact labels indicate areas of the organization where there might be an immediate need for focus.

Decision makers can focus on a few of the biggest drivers to improve performance of the metric as that can even influence other, not so impactful drivers.

Example: In the last 12 months, female representation in your organization's level 4 has increased by 18.8 percentage points.

Which drivers are contributing to higher Female Diversity Trend in Org Level 4?

Top drivers (Dimension: Value)	Impact level (High, Medium, Low)
Ethnicity: Hispanic	High impact
Location: Atlanta	Medium
Management level: 9 manager	Low
Location: New York City Campus	Low

Each top driver tab includes detailed information on the metric composition.

Which areas scored lower for Female Diversity Trend in Org Level 4?

Top drivers (Dimension: Value)	Impact level (High, Medium, Low)
Location: New York	Medium
Job Level: Team Players 2	Low

Each top driver tab includes detailed information on the metric composition.

Detailed Data

The **Detailed Data** tab is designed to be a preview and displays the first 100 rows of data with the possibility of restricting the list to an individual month. You can export the data to a discovery board to view all rows of data and perform further analysis.

Reference: Business Questions by Topic Area

Workday People Analytics surfaces analytics in the form of business questions, organized by topic area. The business questions for each topic area help you gain insight into your organization and discover specific trends and patterns.

Diversity and Inclusion

This topic area helps you understand the current demographic of an organization. It can also help you make improvements in the different segments of diversity within an organization.

Business Question	Guidance	Related Metric
What are key trends in female representation?	Surfaces different trends related to gender diversity within an organization. Trends can consist of positive or negative impacts to overall gender diversity for the organization.	Female Representation
Where can we improve female representation?	Surfaces areas in the organization that need improvement in gender equality. This question compares the female representation of the segment to the female representation in the overall company, organization, or region. Improvements in this dimension also drive improvement to the female representation of the overall company or organization.	Female Representation
Where are gaps in female representation in management?	Surfaces areas in the organization that are lacking female representation in management level roles.	Female Representation Filtered on Is Manager = Yes
Where can we improve female retention in the workforce?	Identifies areas where there are low retention rates for female workers in the organization.	Retention Rate Filtered on Females

Business Question	Guidance	Related Metric
Where are gaps in promoting females?	Surfaces areas in the organization or key indicators that need improvement in gender diversity for the rate of promotions. This helps ensure equal opportunities in upward mobility within an organization.	Promotion Rate Filtered on Females

Organization Composition

This topic area explores business questions related to the structure of an organization.

Business Question	Guidance	Related Metric
Where is the organization growing?	Surfaces areas in the organization that are trending in a positive direction for active headcount growth.	Headcount Growth Rate
What are the outliers in span of control?	Surfaces stories where there might be high or low span of control in the organization by comparing the metric in a particular dimension to the metric for the overall company, region, or organization.	Average Span of Control Excludes unfilled positions
Where are gaps in internal mobility to management?	Surfaces areas of your organization where, compared to other areas, fewer individual contributors, on average, move into management-level roles.	Individual Contributor to Manager Rate
What are outliers in tenure?	Identifies areas in the organization that are categorized as an outlier in average tenure. This could surface areas of high or low tenure in the organization.	Average Tenure
Where are gaps in compa-ratio?	Identifies areas of the organization that are categorized as an outlier in average compa-ratio.	Average Compa-Ratio
Where are gaps in promotions?	Identifies the attributes of workers or the areas that aren't being promoted as much as the overall population of the organization.	Promotion Rate

Retention and Attrition

This topic area explores business questions related to why workers are leaving and how to improve retention of workers in an organization.

Business Question	Guidance	Related Metric
What are the key turnover trends?	Reveals turnover trends in the workforce that are impacting the overall attrition rate in a negative way. Very low turnover could lead to stagnant innovation, while high turnover could lead to high financial impact. This question points to problem areas you can focus on and address proactively.	Attrition Rate
Who is leaving?	Surfaces areas in the company where workers are leaving and the possible reasons workers state for why they are leaving an organization. This business question focuses on the gap between the overall company, region, or organization attrition rate and the area that needs attention.	Attrition Rate
Where can we improve retention?	Surfaces areas of the organization that have a high churn rate, with employees leaving in the early years of their tenure.	Retention Rate
Where do we have the lowest tenure for voluntary terminations?	Sheds insight on when people voluntarily leave the organization. This reflects low tenure in the organization.	Average Voluntary Terminations Tenure
Where do we lose the most new hires?	Surfaces areas where new hires with an average tenure of less than 1 year exit the organization.	New Hires Attrition Rate

Hiring

This topic area explores business questions related to candidates and requisitions for hiring.

Business Question	Guidance	Related Metric
What are the key trends in hiring?	Surfaces areas within the organization that show anomalies in average time to fill from a historical point of view.	Average Time to Fill
Where does it take longer to hire?	Surfaces areas that deviate from the overall company average for time to hire, as well as drivers of stages that create bottlenecks in the hiring process.	Average Time to Hire
What areas do we need to focus on to stay competitive with offers?	Surfaces areas of the organization that could improve offer acceptance by candidates.	Offer Decline Rate

Talent and Performance

This topic area explores business questions related to the talent and performance of workers.

Business Question	Guidance	Related Metric
What are key trends in talent?	Surfaces areas in the organization where workers are flagged as high potentials, providing insight into opportunities for performance growth.	High Potentials Representation
Where are we losing high performers?	Surfaces areas of the organization the business needs to focus on and provides insight on why high performers are leaving the company.	High Performers Voluntary Attrition Rate
Where can we focus to improve performance?	Surfaces areas within the organization that show variances of high performers deviating from the norm by comparing to the high performers rate for the company, region, or organization.	High Performers Rate

Skills

This topic area explores the skills data of your workforce.

Business Question	Guidance	Related Metric
Where are opportunities to upskill workers?	Highlights areas of the organization to upskill workers and improve worker skill sets.	Average Gap Score

Related Information
Reference
The Next Level: People Analytics: Resources to Help Validate Your Organization's Data

Reference: Metrics in People Analytics

People Analytics uses metrics to drive insights to answer key business questions about an organization. These metrics also support KPIs, visualizations, and stories.

Each KPI and story offers a comparison point. Trend stories and KPIs display the historic performance of a given metric. The historic performance snapshot varies depending on the metric. Historic snapshot periods can reflect:

- 12 months ago, if you have at least 13 months of data history.
- 3 months ago, if you have less than 13 months of data history.
- The month prior to the current snapshot period.

Gap stories compare the current performance of the dimension where the story takes place to the current performance of an internal peer group.

The values of these fields determine which records are included in the analysis for a given month:

- Report Effective Date for the Worker pipeline.
- Status Month for the Hiring pipeline.

People Analytics uses these metrics:

Attrition Rate

What uses this metric?	KPI: Attrition Rate Trend Business Question: What are key turnover trends? Gap Business Question: Who is leaving?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.
Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") / {avg_active_headcount_rolling_12_months}, where avg_active_headcount_rolling_12_months = (rollingSum(unique([Employee_ID]), 12) for ("Active_Status", "True") / 12)` OR

	`rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") / {avg_active_headcount_rolling_3_months}, where avg_active_headcount_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("Active_Status", "True") / 3)`
Translation	Based on a 12 month or 3 month rolling period. Number of terminated workers within period / Average active headcount for period (Sum of active headcounts for each month / Number of months in rolling period) * 100
Comparison Point for KPI and Trend Story	Month prior to the current snapshot period
Comparison Point for Gap Story	Internal peer group

Average Compa-Ratio

What uses this metric?	Gap Business Question: Where are gaps in compa-ratio?
Calculation Time Frame	Current snapshot period
Calculation	`sum([Compa_Ratio]) for ("Active_Status", "True") / unique([Employee_ID]) for ("Active_Status", "True")`
Translation	Sum of compa-ratio of active headcount at end of previous month / Active headcount at end of previous month
Comparison Point	Internal peer group

Average Compa-Ratio of Terminations

What uses this metric?	KPI: Average Compa-Ratio of Terminations
Calculation Time Frame	Current snapshot period
Calculation	`sum([Compa_Ratio]) for ("Terminated_This_Period", "True") / unique([Employee_ID]) for ("Terminated_This_Period", "True")`
Translation	Sum of compa-ratio of terminated workers in previous month / Terminated workers in previous month
Comparison Point	Depending on your data history: • 12 months ago, or • 3 months ago.

Average Gap Score

What uses this metric?	Gap Business Question: Where are opportunities to upskill workers?
Calculation Time Frame	Current snapshot period
Calculation	`sum([gap_score_pct]) / unique([Employee_ID])`
Translation	Sum of gap scores for workers at end of previous month / Active headcount at end of previous month Gap Score = 1 - Match Score
Comparison Point	Internal peer group

Average Span of Control

What uses this metric?	KPI: Average Span of Control Gap Business Question: What are outliers in span of control?
Calculation Time Frame	Current snapshot period
Calculation	`sum([Direct_Reports]) for ("Manager_With_Direct_Reports", "True") for ("Active_Status", "True") / unique([Employee_ID]) for ("Manager_With_Direct_Reports", "True") for ("Active_Status", "True")`
Translation	Number of active direct reports at end of previous month / Number of active managers with direct reports at end of previous month Excludes unfilled positions
Comparison Point for KPI	Depending on your data history: • 12 months ago, or • 3 months ago.
Comparison Point for Gap Story	Internal peer group

Example:

Supervisory Org	**Managers**	**Direct Reports**
Vice President	1	2
Director A	1	3
Manager A1	1	4
Manager A2	1	7
Manager A3	1	3
Director B	1	4
Manager B1	1	2

Supervisory Org	Managers	Direct Reports
Manager B2	1	5
Manager B3	1	8
Manager B4	1	3
Total	**10**	**41**

Average Tenure

What uses this metric?	KPI: Average Tenure Gap Business Question: What are outliers in tenure?
Calculation Time Frame	Current snapshot period
Calculation	`sum([Length_Of_Service_In_Partial_Years]) for ("Active_Status", "True") / unique([Employee_ID]) for ("Active_Status", "True")`
Translation	Sum of length of service of active headcount at end of previous month / Active headcount at end of previous month
Comparison Point for KPI	Depending on your data history: • 12 months ago, or • 3 months ago.
Comparison Point for Gap Story	Internal peer group

Average Time To Fill

What uses this metric?	Trend Business Question: What are key trends in hiring?
Calculation Time Frame	Current snapshot period
Calculation	`(total_reqs_hired_filled_time) / (reqs_filled_hired)`
Variables for Calculation	• `total_reqs_hired_filled_time = sum([Requisition_Time_To_Fill]) for ("Can_Job_Requisition_Status_Instance_Evaluate "filled") for ("Stage_Consolidated", "hire")` • `Requisition_Time_To_Fill = DAYS_BETWEEN([Req_Job_Requisition_Filled_Dat [Req_Recruiting_Start_Date])`

	• `reqs_filled_hired = {candidates_hired} for ("Can_Job_Requisition_Status_Instance_Evaluate`
	  • `Candidates_hired = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","hire")`
	  • `Candidate_JobRequisiton = CONCAT([Candidate_ID], "-", [Job_Requisition])`

Translation	Sum of time to fill for hires in filled requisitions in previous month (Number of days from requisition start date to requisition filled date) / Number of hires in filled requisitions in previous month
Comparison Point	Depending on your data history: • 12 months ago, or • 3 months ago.

Average Time To Hire

What uses this metric?	KPI: Average Time to Hire Gap Business Question: Where does it take longer to hire?
Calculation Time Frame	Current snapshot period
Calculation	`(total_time_to_hire) / (candidates_hired)`

Variables for Calculation	• `total_time_to_hire = sum([Time_To_Hire]) for ("Stage_Consolidated", "hire")`
	  • `Time_To_Hire = DAYS_BETWEEN([Recruiting_Start_Date], [Worker_Hire_Date])`
	• `candidates_hired = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","hire")`
	  • `Candidate_JobRequisiton = CONCAT([Candidate_ID], "-", [Job_Requisition])`

Translation for KPI	Sum of time to hire for hires in previous month (Number of days from requisition start date to hire date) / Number of hires in previous month * 100
Translation for Gap Business Question	Sum of time to hire for hires in previous month (Number of days from requisition start date to hire date) / Number of hires in previous month
Comparison Point for KPI	Depending on your data history: • 12 months ago, or • 3 months ago.

Comparison Point for Gap Story	Internal peer group

Average Voluntary Terminations Tenure

What uses this metric?	Gap Business Question: Where do we have the lowest tenure for voluntary terminations?
Calculation Time Frame	Current snapshot period
Calculation	`sum([Length_Of_Service_In_Partial_Years]) for ("Terminated_This_Period", "True") for ("Termination_Category", "Voluntary") / unique([Employee_ID]) for ("Terminated_This_Period", "True") for ("Termination_Category", "Voluntary")`
Translation	Sum of length of service of voluntary terminations in previous month / Voluntary terminations in previous month
Comparison Point	Internal peer group

Female Attrition Rate

What uses this metric?	KPI: Female Attrition Rate
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.

Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") for ("Gender", "Female") / {avg_female_headcount_rolling_12_months}, where avg_female_headcount_rolling_12_months = (rollingSum(unique([Employee_ID]), 12) for ("Gender", "Female") for ("Active_Status", "True") / 12)`
	OR
	`rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") for ("Gender", "Female") / {avg_female_headcount_rolling_3_months}, where avg_female_headcount_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("Gender", "Female") for ("Active_Status", "True") / 3)`

Translation	Based on a 12 month or 3 month rolling period. Number of female terminations within period / Average female headcount for period (Sum of

	female headcounts for each month / Number of months in rolling period) * 100
Comparison Point	Month prior to the current snapshot period

Female Representation

What uses this metric?	KPI: Female Representation Trend Business Question: What are key trends in female representation? Gap Business Question: Where can we improve female representation?
Calculation Time Frame	Current snapshot period
Calculation	`unique([Employee_ID]) for ("Active_Status", "True") for ("Gender", "Female") / unique([Employee_ID]) for ("Active_Status", "True")`
Translation	Number of female active workers at end of previous month / Active headcount at end of previous month * 100
Comparison Point for KPI and Trend Story	Depending on your data history: • 12 months ago, or • 3 months ago.
Comparison Point for Gap Story	Internal peer group
What uses this metric?	Gap Business Question: Where are gaps in female representation in management?
Calculation Time Frame	Current snapshot period
Calculation	`unique([Employee_ID]) for ("Active_Status", "True") for ("Is_Manager", "True") for ("Gender", "Female") / unique([Employee_ID]) for ("Active_Status", "True") for ("Is_Manager", "True")`
Translation	Number of female active workers at end of previous month / Active headcount at end of previous month * 100 Filtered on Is Manager = Yes
Comparison Point	Internal peer group

Female Representation in Leadership

What uses this metric?	KPI: Female Representation in Leadership
Calculation Time Frame	Current snapshot period

Calculation	`unique([Employee_ID]) for ("Is_Leader", "True") for ("Gender", "Female") for ("Active_Status", "True") / unique([Employee_ID]) for ("Is_Leader", "True") for ("Active_Status", "True")`
Translation	Number of female active leaders at end of previous month / Active leaders at end of previous month * 100
Comparison Point	Depending on your data history: • 12 months ago, or • 3 months ago.

Headcount Growth Rate

What uses this metric?	Trend Business Question: Where is the organization growing?
Calculation Time Frame	Current snapshot period

Calculation	`(unique([Employee_ID]) - previous(unique([Employee_ID]), 6) for ("Active_Status", "True")) / previous(unique([Employee_ID]), 6) for ("Active_Status", "True")`
	OR
	`(unique([Employee_ID]) - previous(unique([Employee_ID]), 3) for ("Active_Status", "True")) / previous(unique([Employee_ID]), 3) for ("Active_Status", "True")`

Translation	Based on a 6 month or 3 month historic snapshot period. (Active headcount at end of previous month - Active headcount at beginning of period) / Active headcount at beginning of period
Comparison Point	Depending on your data history: • 6 months ago, or • 3 months ago.

High Performers Rate

What uses this metric?	Gap Business Question: Where can we focus to improve performance?
Calculation Time Frame	Current snapshot period
Calculation	`unique([Employee_ID]) for ("High_Performer", "True") for ("Active_Status", "True") /`

	`unique([Employee_ID]) for ("Active_Status", "True")`
Translation	Number of high performer active workers at end of previous month / Active headcount at end of previous month * 100
Comparison Point	Internal peer group

High Performers Voluntary Attrition Rate

What uses this metric?	KPI: High Performers Voluntary Attrition Rate Gap Business Question: Where are we losing high performers?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.
Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") for ("Termination_Category", "Voluntary") for ("High_Performer", "True") / {avg_high_performer_headcount_rolling_12_months}, where avg_high_performer_headcount_rolling_12_months = (rollingSum(unique([Employee_ID]), 12) for ("High_Performer", "True") for ("Active_Status", "True") / 12)` OR `rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") for ("Termination_Category", "Voluntary") for ("High_Performer", "True") / {avg_high_performer_headcount_rolling_3_months}, where avg_high_performer_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("High_Performer", "True") for ("Active_Status", "True")/ 3)`
Translation	Based on a 12 month or 3 month rolling period. Number of voluntary high performers terminations within period / High performers average active headcount for period (Sum of active headcounts for each month / Number of months in rolling period) * 100
Comparison Point for KPI	Month prior to the current snapshot period
Comparison Point for Gap Story	Internal peer group

High Potentials Representation

What uses this metric?	KPI: High Potentials Representation Trend Business Question: What are key trends in talent?
Calculation Time Frame	Current snapshot period
Calculation	`unique([Employee_ID]) for ("Is_High_Potential", "True") for ("Active_Status", "True") / unique([Employee_ID]) for ("Active_Status", "True")`
Translation	Number of high potential active workers at end of previous month / Active headcount at end of previous month * 100
Comparison Point	Depending on your data history: • 12 months ago, or • 3 months ago.

High Potentials Voluntary Attrition Rate

What uses this metric?	KPI: High Potentials Voluntary Attrition Rate
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.
Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") for ("Termination_Category", "Voluntary") for ("Is_High_Potential", "True") / {avg_high_potentials_headcount_rolling_12_months} where avg_high_potentials_headcount_rolling_12_months = (rollingSum(unique([Employee_ID]), 12) for ("Is_High_Potential", "True") for ("Active_Status", "True") / 12)` OR `rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") for ("Termination_Category", "Voluntary") for ("Is_High_Potential", "True") / {avg_high_potentials_headcount_rolling_3_months}, where avg_high_potentials_headcount_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("Is_High_Potential", "True") for ("Active_Status", "True") / 3)`

Translation	Based on a 12 month or 3 month rolling period. Number of voluntary high potentials terminations within period / High potentials average active headcount for period (Sum of high potentials headcounts for each month / Number of months in rolling period) * 100
Comparison Point	Month prior to the current snapshot period

Individual Contributor to Manager Rate

What uses this metric?	Gap Business Question: Where are gaps in internal mobility to management?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.

Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Active_Status", "True") for ("IC_To_MGR_This_Period", "True") / {avg_active_headcount_rolling_12_months}, where avg_active_headcount_rolling_12_months = (rollingSum(unique([Employee_ID]), 12) for ("Active_Status", "True") / 12)`
	OR
	`rollingSum(unique([Employee_ID]), 3) for ("Active_Status", "True") for ("IC_To_MGR_This_Period", "True") / {avg_active_headcount_rolling_3_months}, where avg_active_headcount_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("Active_Status", "True") / 3)`

Translation	Based on a 12 month or 3 month rolling period. Number of active individual contributors to management within period / Average active headcount for period (Sum of active headcounts for each month / Number of months in rolling period) * 100
Comparison Point	Month prior to the current snapshot period

New Hires Attrition Rate

What uses this metric?	Gap Business Question: Where do we lose the most new hires?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or

	• 3 month rolling period.
Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") for ("Is_New_Hire", "True") / {avg_new_hires_headcount_rolling_12_months}, where avg_new_hires_headcount_rolling_12_months = (rollingSum(unique([Employee_ID]), 12) for ("Is_New_Hire", "True") for ("Active_Status", "True")/ 12)` OR `rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") for ("Is_New_Hire", "True") / {avg_new_hires_headcount_rolling_3_months}, where avg_new_hires_headcount_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("Is_New_Hire", "True") for ("Active_Status", "True")/ 3)`
Translation	Based on a 12 month or 3 month rolling period. Number of terminated new hires within period / New hires average active headcount for period (Sum of new hires active headcounts for each month / Number of months in rolling period) * 100
Comparison Point	Internal peer group

New Hires Retention Rate

What uses this metric?	KPI: New Hires Retention Rate
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.
Calculation	`(previous(unique([Employee_ID]), 12) for ("Is_New_Hire", "True") for ("Active_Status", "True") - rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") for ("Is_New_Hire", "True") + rollingSum(unique([Employee_ID]), 12) for ("Hired_This_Period", "True")) / (previous(unique([Employee_ID]), 12) for ("Is_New_Hire", "True") for ("Active_Status", "True") + rollingSum(unique([Employee_ID]), 12) for ("Hired_This_Period", "True"))` OR

	`(previous(unique([Employee_ID]), 3) for ("Is_New_Hire", "True") for ("Active_Status", "True") - rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") for ("Is_New_Hire", "True") + rollingSum(unique([Employee_ID]), 3) for ("Hired_This_Period", "True")) / (previous(unique([Employee_ID]), 3) for ("Is_New_Hire", "True") for ("Active_Status", "True") + rollingSum(unique([Employee_ID]), 3) for ("Hired_This_Period", "True"))`
Translation	Based on a 12 month or 3 month rolling period. (Active new hires at beginning of period + Hired workers within period - Terminated new hires within period) / (Active new hires at beginning of period + Hired workers within period) * 100
Comparison Point	Month prior to the current snapshot period

Offer Accepted Rate

What uses this metric?	KPI: Offer Accepted Rate
Calculation Time Frame	Current snapshot period
Calculation	`( (candidates_offered) - (candidates_offer_pending) - (candidates_offer_declined) ) / ( (candidates_offered) - (candidates_offer_pending) )`
Variables for Calculation	• `candidates_offered = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","offer")` • `candidates_offer_pending = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","offer") for ("Candidate_Stage_Instance_Evaluated","offer")` • `candidates_offer_declined = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","offer") for ("Candidate_Stage_Instance_Evaluated","decline by candidate")` • `Candidate_JobRequisiton = CONCAT([Candidate_ID],"-", [Job_Requisition])`
Translation	(Offers extended - Offers with decision pending from candidate - Offers declined) / (Offers extended - Offers with decision pending from candidate) * 100

Comparison Point	Depending on your data history: • 12 months ago, or • 3 months ago.

Offer Decline Rate

What uses this metric?	Gap Business Question: What areas do we need to focus on to stay competitive with offers?
Calculation Time Frame	Current snapshot period
Calculation	`(candidates_offer_declined) / ( (candidates_offered) - (candidates_offer_pending) )`
Variables for Calculation	• `candidates_offer_declined = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","offer") for ("Candidate_Stage_Instance_Evaluated","decline by candidate")` • `candidates_offered = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","offer")` • `candidates_offer_pending = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","offer") for ("Candidate_Stage_Instance_Evaluated","offer")` • `Candidate_JobRequisiton = CONCAT([Candidate_ID],"-",[Job_Requisition])`
Translation	Offers declined / Offers extended (excluding pending) * 100
Comparison Point	Internal peer group

Promotion Rate

What uses this metric?	KPI: Promotion Rate Gap Business Question: Where are gaps in promotions?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.
Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Promoted_This_Period", "True") for ("Active_Status", "True") / {avg_active_headcount_rolling_12_months}, where avg_active_headcount_rolling_12_months`

	`= (rollingSum(unique([Employee_ID]), 12) for ("Active_Status", "True") / 12)`
	OR
	`rollingSum(unique([Employee_ID]), 3) for ("Promoted_This_Period", "True") for ("Active_Status", "True") / {avg_active_headcount_rolling_3_months}, where avg_active_headcount_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("Active_Status", "True") / 3)`

Translation	Based on a 12 month or 3 month rolling period. Number of promoted active workers within period / Average active headcount for period (Sum of active headcounts for each month / Number of months in rolling period) * 100
Comparison Point for KPI	Month prior to current snapshot period
Comparison Point for Gap Story	Internal peer group
What uses this metric?	Gap Business Question: Where are gaps in promoting females?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.

Calculation	`rollingSum(unique([Employee_ID]), 12) for ("Promoted_This_Period", "True") for ("Active_Status", "True") / {avg_active_headcount_rolling_12_months}, where avg_active_headcount_rolling_12_months = (rollingSum(unique([Employee_ID]), 12) for ("Active_Status", "True") / 12)`
	OR
	`rollingSum(unique([Employee_ID]), 3) for ("Promoted_This_Period", "True") for ("Active_Status", "True") / {avg_active_headcount_rolling_3_months}, where avg_active_headcount_rolling_3_months = (rollingSum(unique([Employee_ID]), 3) for ("Active_Status", "True") / 3)`

Translation	Based on a 12 month or 3 month rolling period. Filtered on females. Number of promoted active workers within period / Average active headcount for period (Sum of active

	headcounts for each month / Number of months in rolling period) * 100
Comparison Point	Internal peer group

Referral Hire Rate

What uses this metric?	KPI: Referral Hire Rate
Calculation Time Frame	Current snapshot period
Calculation	`(candidates_hired_referred) / (candidates_hired)`
Variables for Calculation	• `candidates_hired_referred = {candidates_hired} for ("Source_Instance_Evaluated", "referral")` • `candidates_hired = unique([Candidate_JobRequisiton]) for ("Stage_Consolidated","hire")` • `Candidate_JobRequisiton = CONCAT([Candidate_ID],"-", [Job_Requisition])`
Translation	Number of referral hires in previous month / Number of hires in previous month * 100
Comparison Point	Depending on your data history: • 12 months ago, or • 3 months ago.

Retention Rate

What uses this metric?	Gap Business Question: Where can we improve female retention in the workforce?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.
Calculation	`(previous(unique([Employee_ID]), 12) for ("Gender", "Female") for ("Active_Status", "True") - rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") for ("Gender", "Female") + rollingSum(unique([Employee_ID]), 12) for ("Hired_This_Period", "True") for ("Gender", "Female")) / (previous(unique([Employee_ID]), 12) for ("Gender", "Female") for ("Active_Status", "True") + rollingSum(unique([Employee_ID]), 12)`

	`for ("Hired_This_Period", "True") for ("Gender", "Female"))`
	OR
	`(previous(unique([Employee_ID]), 3) for ("Gender", "Female") for ("Active_Status", "True") - rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") for ("Gender", "Female") + rollingSum(unique([Employee_ID]), 3) for ("Hired_This_Period", "True") for ("Gender", "Female")) / (previous(unique([Employee_ID]), 3) for ("Gender", "Female") for ("Active_Status", "True") + rollingSum(unique([Employee_ID]), 3) for ("Hired_This_Period", "True") for ("Gender", "Female"))`

Translation	Based on a 12 month or 3 month rolling period. Filtered on females. (Active headcount at beginning of period + Hires within period - Terminations within period) / (Active headcount at beginning of period + Hires within period) * 100
Comparison Point	Internal peer group
What uses this metric?	Gap Business Question: Where can we improve retention?
Calculation Time Frame	Depending on your data history: • 12 month rolling period, or • 3 month rolling period.
Calculation	`(previous(unique([Employee_ID]), 12) for ("Active_Status", "True") - rollingSum(unique([Employee_ID]), 12) for ("Terminated_This_Period", "True") + rollingSum(unique([Employee_ID]), 12) for ("Hired_This_Period", "True")) / (previous(unique([Employee_ID]), 12) for ("Active_Status", "True") + rollingSum(unique([Employee_ID]), 12) for ("Hired_This_Period", "True"))` OR `(previous(unique([Employee_ID]), 3) for ("Active_Status", "True") - rollingSum(unique([Employee_ID]), 3) for ("Terminated_This_Period", "True") + rollingSum(unique([Employee_ID]), 3) for ("Hired_This_Period", "True")) / (previous(unique([Employee_ID]),`

	`3) for ("Active_Status", "True") + rollingSum(unique([Employee_ID]), 3) for ("Hired_This_Period", "True"))`
Translation	Based on a 12 month or 3 month rolling period. (Active headcount at beginning of period + Hires within period - Terminations within period) / (Active headcount at beginning of period + Hires within period) * 100
Comparison Point	Internal peer group

Related Information
Reference
The Next Level: People Analytics: Resources to Help Validate Your Organization's Data

Reference: Visualizations by Topic Area

Use the configuration details in the tables to recreate People Analytics visualizations across topic areas. You can then add additional fields and specifications to customize your analysis according to the needs of your business.

Diversity and Inclusion

Visualization	Time Frame	Graph Type	Fields	Filters
Ethnicity Trend	Rolling 12 months	Type: Line Chart	X-Axis: Month Override Y-Axis Display Name: Active Headcount Color: Ethnicity	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 13]`
Gender by Tenure Category	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Stack to 100	X-Axis: Tenure Category Override Y-Axis Display Name: Active Headcount Color: Gender	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`
Gender Trend	Rolling 12 months	Type: Line Chart	X-Axis: Month	`'Active Status' = 'is true'`

Visualization	Time Frame	Graph Type	Fields	Filters
			Override Y-Axis Display Name: Active Headcount Color: Gender	`'Snapshot_Index' = 'is between', value: [1, 13]`
Generation Trend	Rolling 12 months	Type: Line Chart	X-Axis: Month Override Y-Axis Display Name: Active Headcount Color: Generation	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 13]`
Management Level by Gender	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Stack to 100	X-Axis: Management Level X-Axis Sort Order: Value Total - Descending Override Y-Axis Display Name: Active Headcount Color: Gender	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`
Termination Count by Ethnicity	Rolling 12 months	Type: Heatmap	X-Axis: Month Y-Axis: Ethnicity	`'Terminated This Period' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 13]`
Termination Count by Generation	Rolling 12 months	Type: Heatmap	X-Axis: Month Y-Axis: Generation	`'Terminated This Period' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 13]`
Top 5 Termination Reasons by Gender - Rolling 3 Months	Rolling 3 months. This graph might adjust each snapshot period due to the volume of terminations per category.	Type: Bar Chart Orientation: Vertical Grouping: Stack	X-Axis: Termination Reason X-Axis Sort Order: Value Total - Descending X-Axis Limit: 5 groupings Sum Remaining Values for X-Axis: False	`'Terminated This Period' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 3]`

Visualization	Time Frame	Graph Type	Fields	Filters
			Override Y-Axis Display Name: Terminated Headcount Color: Gender Color Sort Order: Value Total - Descending	

Organization Composition

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
Average Compa-Ratio by Job Family Group	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Job Family Group X-Axis Sort Order: Value Total - Descending Y-Axis: AVG(Compa-Ratio) Override Y-Axis Display Name: Average Compa-Ratio	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	
Average Compa-Ratio by Top 10 Locations	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Location X-Axis Sort Order: Value Total - Descending X-Axis Limit: 10 groupings Sum Remaining Values for X-Axis: False Y-Axis: AVG(Compa-Ratio) Override Y-Axis Display Name: Average Compa-Ratio	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	
Average Tenure at Promotion by Management	Rolling 12 months	Type: Bar Chart Orientation: Vertical	X-Axis: Management Level	`'Active Status' = 'is true'`	

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
Level - Rolling 12 Months		Grouping: Cluster	X-Axis Sort Order: Value Total - Descending Y-Axis: AVG(Length of Service In Partial Years) Override Y-Axis Display Name: Average Tenure in Partial Years	`'Promoted this Period' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 12]`	
Average Tenure by Job Family Group	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Job Family Group X-Axis Sort Order: Value Total - Descending Y-Axis: AVG(Length of Service In Partial Years) Override Y-Axis Display Name: Average Tenure in Partial Years	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	
Average Tenure by Top 10 Locations	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Location X-Axis Sort Order: Value Total - Descending X-Axis Limit: 10 groupings Sum Remaining Values for X-Axis: False Y-Axis: AVG(Length of Service In Partial Years) Override Y-Axis Display Name: Average Tenure in Partial Years	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	
Headcount Movement	Rolling 3 months	Type: Waterfall	Measures:	`'Headcount Movement'`	The headcount movement

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
- Rolling 3 Months		Orientation: Vertical	• SUM(Active Beginning of Quarter) • SUM(Hired This Quarter) • SUM(Terminated This Quarter) • SUM(Transfers in This Quarter) • SUM(Transfers Out This Quarter) Viz Options: Show data labels: True Hide total: False Override X-Axis Display Name: " " Override Y-Axis Displaye Name: Worker Count Override Measure Display Names: • Active Beginning of Period • Hired • Terminated • Transfers In • Transfers Out • Active End of Period	`= 'is in list', value: [Headcount Movement]`	graph starts with a beginning active headcount and after aggregates hires, terminations, and transfers for the next 3 months. The last bar displays the active headcount with those changes at the end of the 3 month period. Transfers include both true transfers and reorganizations.
Managers vs Individual Contributors by Job Family Group	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Stack to 100	X-Axis: Job Family Group X-Axis Sort Order: Value Total - Descending Override Y-Axis Display	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
			Name: Active Headcount Color: Manager vs Individual Contributor		
Managers vs Individual Contributors by Tenure Category	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Stack to 100	X-Axis: Tenure Category Color: Manager vs Individual Contributor Override Y-Axis Display Name: Active Headcount	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	
Monthly Active Headcount	Rolling 12 months	Type: Line Chart	X-Axis: Month Override Y-Axis Display Name: Active Headcount	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 12]`	

Monthly Average Number of Directs by Organization Level	Rolling 12 months	Type: Heatmap	X-Axis: Month
			Y-Axis: Organization Level
			Y-Axis Sort Order: Alphabetical - Descending
			Color: AVG(Direct Reports)
			Override Color Display Name: Average Number of Directs
				`'Active Status' = 'is true'`
				`'Manager With Direct Reports' = 'is true'`
				`'Snapshot_Index' = 'is between', value: [1, 13]`	

Organizational Depth in Layers	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Organization Level Override Y-Axis Display Name: Active Headcount	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	Each layer represents an aggregated group of employees based on their level in the organization. This

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
					visualization helps you understand the shape of the workforce and gives a visual representation of where your organization might be top or bottom heavy.
Organization Levels by Management Level	Current snapshot period	Type: Heatmap	X-Axis: Organization Level Y-Axis: Management Level	`'Active Status' = 'is true'` `'Snapshot_Index = 'is between', value: [1, 1]`	This visualization might reveal whether employees at higher management levels are far from the top levels of the organization.

Retention and Attrition

Visualization	Time Frame	Graph Type	Fields	Filters	Notes

New Hire Terminations by Job Family Group - Rolling 3 Months	Rolling 3 months	Type: Bar Chart
		Orientation: Vertical
		Grouping: Cluster
			X-Axis: Job Family Group
			X-Axis Sort Order: Value Total - Descending
			Override Y-Axis Display Name: Terminated Headcount
				`'New Hire' = 'is true'`
				`'Snapshot_Index = 'is between', value: [1, 3]`
				`'Terminated This Period' = 'is true'`
					New Hires are defined as workers with less than 1 year of tenure.

Termination Count by Job Family Group - Rolling 3 Months	Rolling 3 months	Type: Bar Chart Orientation: Vertical Grouping: Stack	X-Axis: Job Family Group X-Axis Sort Order: Value Total - Descending Override Y-Axis Display Name: Terminated Headcount	`'Snapshot_Index' = 'is between', value: [1, 3]` `'Terminated This Period' = 'is true'`	

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
			Color: Termination Category Color Sort Order: Value Total - Descending		
Termination Count by Management Level - Rolling 3 Months	Rolling 3 months	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Management Level X-Axis Sort Order: Value Total - Descending Override Y-Axis Display Name: Terminated Headcount	`'Snapshot_Index' = 'is between', value: [1, 3]` `'Terminated This Period' = 'is true'`	
Termination Count by Tenure Category - Rolling 3 Months	Rolling 3 months	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Tenure Category Override Y-Axis Display Name: Terminated Headcount	`'Snapshot_Index' = 'is between', value: [1, 3]` `'Terminated This Period' = 'is true'`	The tenure categories are defined at the tenant level.
Terminations by Compa-Ratio Range - Rolling 3 Months	Rolling 3 months	Type: Bar Chart Orientation: Vertical Grouping: Stack to 100	X-Axis: Compa-Ratio Range X-Axis Sort Order: Alphabetical - Descending Override Y-Axis Display Name: Terminated Headcount Color: Termination Category Color Sort Order: Alphabetical - Descending	`'Snapshot_Index' = 'is between', value: [1, 3]` `'Terminated This Period' = 'is true'`	The Compa-ratio ranges are defined at the tenant level.
Top 10 Locations for New Hire	Rolling 3 months	Type: Bar Chart Orientation: Vertical	X-Axis: Location	`'New Hire' = 'is true'`	New Hires are defined as workers with

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
Terminations - Rolling 3 Months		Grouping: Cluster	X-Axis Sort Order: Value Total - Descending X-Axis Limit: 10 groupings Override Y-Axis Display Name: Terminated Headcount	`'Snapshot_Index' = 'is between', value: [1, 3]` `'Terminated This Period' = 'is true'`	Less than 1 year of tenure.

Top 10 Voluntary Termination Reasons by Gender - Rolling 3 Months	Rolling 3 months	Type: Bar Chart
		Orientation: Horizontal
		Grouping: Stack
			Y-Axis: Termination Reason
			Y-Axis
			Sort Order: Value Total - Descending
			Y-Axis Limit: 10 groupings
			Sum Remaining Values for Y-Axis: False
			Color: Gender
			Override X-Axis Display Name: Terminated Headcount
				`'Snapshot_Index' = 'is between', value: [1, 3]`
				`'Termination Category' = 'is in list', value: [Voluntary]`
				`'Terminated This Period' = 'is true'`
					Top 10 termination reasons are subject to change each month.

Voluntary Termination Count by Month	Rolling 12 months.	Type: Bar Chart
		Orientation: Vertical
		Grouping: Cluster
			X-Axis: Month
			Override Y-Axis Display Name: Terminated Headcount
				`'Snapshot_Index' = 'is between', value: [1, 13]`
				`'Termination Category' = 'is in list', value: [Voluntary]`
				`'Terminated This Period' = 'is true'`	

Hiring

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
Average Time to Fill by Management Level - Rolling 12 Months	Rolling 12 months	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Req_Management_Level_Job_Requisition X-Axis Sort Order: Value Total - Descending Override X-Axis Display Name: Management Level Requisition Y-Axis: AVG(Time To Fill) Override Y-Axis Display Name: Average Time to Fill in Days	'Req_Management_Level_Job_Requisition' = is not empty 'Last Requisition Entry' = 'is in list', value: [1] 'Last_Year' = 'is in list', value: [1] 'Requisition_Time_To_Fill' = 'not equals', value: [0]	
Hires per Month	Rolling 12 months	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Month Override Y-Axis Display Name: Number of Hires	'Last_Year' = 'is in list', value: [1] 'Hired this Period' = 'is in list', value: [yes]	A hire is recognized by the start date of the new hire.
Job Application Sources - Rolling 12 Months	Rolling 12 months	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Job Application Source X-Axis Sort Order: Value Total - Descending X-Axis Limit: 20 groupings Override X-Axis Display Name: Source Override Y-Axis Display Name: Number of Hires	'Last_Year' = 'is in list', value: [1] 'Hired this Period' = 'is in list', value: [yes]	

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
Number of Open Requisitions by Aging	Current snapshot period	Type: Heatmap	X-Axis: Job Requisition Age Category Y-Axis: Req_Management_Level_Job_Requisition Override Y-Axis Display Name: Management Level	'Candidate Job Requisition Status Instance Evaluated' = 'is in list', value: [open] 'Req_Management_Level_Job_Requisitio = 'is not empty' 'Last Requisition Entry' = 'is in list', value: [1] 'Job Requisition Age Category' = 'is not blank'	The data source only includes requisitions that have at least 1 candidate attached to the requisition. This visualization helps you: • Manage requisitions that have not been filled for a long time. • Understand how many requisitions are in the queue and for how long.
Requisitions Opened each Month	Rolling 12 months	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Month Override Y-Axis Display Name: Number of Requisitions	'Last_Year' = 'is in list', value: [1] 'Req_Opened_This_Month' = 'is in list', value: [1]	The data source only includes requisitions that have at least 1 candidate attached to the requisition.
Top 10 Decline Reasons - Rolling 12 Months	Rolling 12 months	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Disposition Reason X-Axis Sort Order: Value Total - Descending X-Axis Limit: 10 groupings Override X-Axis Display Name: Decline Reason Override Y-Axis Display	'Candidate Stage Instance Evaluated' = 'is in list', value: [declined by candidate, rejected] 'Stage Consolidated' = 'is in list', value: [offer]	Top 10 decline reasons are subject to change each snapshot period.

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
			Name: Number of Candidates	`'Last_Year' = 'is in list', value: [1]`	

Talent and Performance

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
Current Rating by Job Family Group	Current snapshot period	Type: Heatmap	X-Axis: Job Family Group Y-Axis: Current Rating	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	Performance rating is defined at the tenant level.
Current Rating by Management Level	Current snapshot period	Type: Heatmap	X-Axis: Management Level Y-Axis: Current Rating	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	
Current Rating Overview	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Current Rating Override Y-Axis Display Name: Active Headcount	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	Performance rating is defined at the tenant level.
Termination Count by Current Rating	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Stack	X-Axis: Current Rating Override Y-Axis Display Name: Terminated Headcount Color: Termination Category	`'Terminated This Period' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`	
Termination Type of High Potentials by Month	Rolling 12 months	Type: Bar Chart Orientation: Vertical Grouping: Stack	X-Axis: Month Color: Termination Category	`'High Potential' = 'is true'` `'Snapshot_Index' = 'is between',`	High potentials are defined at the tenant level.

Visualization	Time Frame	Graph Type	Fields	Filters	Notes
			Override Y-Axis Display Name: Terminated Headcount	`value: [1, 12]` `'Terminated This Period' = 'is true'`	

Top 5 Voluntary Termination Reasons for High Performers - Rolling 12 Months	Rolling 12 months	Type: Bar Chart
		Orientation: Vertical
		Grouping: Cluster
			X-Axis: Termination Reason
			X-Axis Sort Order: Value Total - Descending
			X-Axis Limit: 5 groupings
			Sum Remaining Values for X-Axis: False
			Override Y-Axis Display Name: Terminated Headcount
				`'High Performer' = 'is true'`
				`'Snapshot_Index' = 'is between', value: [1, 12]`
				`'Terminated This Period' = 'is true'`
				`'Termination Category' = 'is in list', value: [Voluntary]`
					The top 5 reasons might change every snapshot period.

Skills

Visualization	Time Frame	Graph Type	Fields	Filters
Match Score Signal by Top 10 Job Family Groups	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Stack to 100	X-Axis: Job Family Group X-Axis Sort Order: Alphabetical - Ascending Override Y-Axis Display Name: Match Score Signal Percentage Color: Worker Match Score Signal	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`
Match Score Signal Distribution	Current snapshot period	Type: Bar Chart Orientation: Vertical Grouping: Cluster	X-Axis: Worker Match Score Signal Override Y-Axis Display Name: Active Headcount	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`

Visualization	Time Frame	Graph Type	Fields	Filters
Top 10 Skill Categories by Job Family Group	Current snapshot period	Type: Heatmap	X-Axis: Skill Categories X-Axis Sort Order: Value Total - Descending X-Axis Limit: 10 groupings Color: Job Family Group	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`
Top 10 Skill Categories by Management Level	Current snapshot period	Type: Heatmap	X-Axis: Skill Categories X-Axis Sort Order: Value Total - Descending X-Axis Limit: 10 groupings Y-Axis: Management Level	`'Active Status' = 'is true'` `'Snapshot_Index' = 'is between', value: [1, 1]`

Related Information
Tasks
Steps: Create Visualizations
Reference
The Next Level: People Analytics: Resources to Help Validate Your Organization's Data

FAQ: People Analytics

What is Storyteller?

Storyteller is an automated analytical engine that:

- Searches millions of combinations of data.

- Makes connections between the combinations of data.
- Surfaces the most significant results in the form of stories.

What is augmented analytics?

Augmented analytics is an approach that uses statistical techniques and advanced analytics to automate findings in the data that aren't easily attainable by doing manual analytical work. Storyteller brings the principles of augmented analytics into practice.

What is a story?

A story is a narrative summary of a finding in the data that answers a business question. Example: What are key turnover trends? Each story describes an instance of significant under or overperformance in a metric. To enable better decision making, a story also provides the associated trend and a list of the most important drivers contributing to the metric.

How are stories generated?

Storyteller:

1. Groups the input data into different views by aggregating metrics for each dimension and different combinations of dimensions.
2. Filters out any views that have no data or are statistically insignificant.
3. Makes connections between the views to create a network that defines the relationships between views. This network of relationships provides context when evaluating 1 view compared to another. Example: The view of `Location = Chicago` has these relationships:
   - The parent of `Location = Chicago; Cost Center = Sales`.
   - The child of the whole organization.
   - The sibling of `Location = New York`.
   - A proxy to `Cost Center = Sales` because the entire Sales department is in Chicago and 90% of the workforce in Chicago are salespeople.
4. Analyzes the views in the network of relationships to determine their significance.
5. Returns the most significant views in the form of stories.

How does Storyteller determine the most relevant information?

Storyteller analyzes and evaluates the statistical significance of each view of the data. It clusters views together based on several factors, including:

- Commonality of the underlying data.
- Hierarchical relationship.
- Similarity of problem.

It then ranks each view based on the greatest impact to the related business question and displays the most significant views as stories.

What kinds of analysis do the stories use?

Each story is the result of either:

- Trend analysis: Storyteller compares the current month metric performance in a dimension or combination of dimensions to the historical performance.
- Gap analysis: Storyteller compares the current month metric performance for a dimension or combination of dimensions to the internal peer group average. Example: If the dimension is supervisory organization, performance is compared to Company or Level 1.

Depending on the story, the population might be:

- All active workers.
- All terminated workers.
- All active and terminated workers.
- A subset of those populations filtered by Level 1 in either the Primary Hierarchy or Secondary Hierarchy.

How can we compare metric performance across dimensions in stories?

In order to normalize the metric performance of any organization or region and make them comparable, Storyteller weights performance by the underlying employee population. This helps reduce the outsize impact of large percentage changes in a small population.

To do this normalization, Storyteller:

- Calculates the average of the metric for the combination of dimensions in the story.
- Calculates the average of the metric for the relevant population. Example: Company or subset containing peers.
- Calculates the difference or delta between these 2 averages.
- Weighs the delta by multiplying it by the size of the population of the combination of dimensions.

Storyteller tells you how much the metric for that combination of dimensions needs to change to be consistent with the metric for the total population.

Why do some top drivers contribute more than 100%?

When a top driver contributes more than 100% to the negative performance of a metric in a story, other factors might have an opposite effect that contributed positively to the performance.

Example: If a story displays a red negative number, the top drivers for that story also display as red negative numbers. Workday ranks the drivers by their contribution to the underperformance of the metric. On the **Drivers** tab of the **View More** dialog, a corresponding green bar displays if there's a red bar that's over 100%.

How do the stories change as time progresses?	All stories are recalculated each time Storyteller runs. After each snapshot update, there's a new set of stories displayed on the dashboard based on the current data. In all these cases, what drives the display of stories is a statistical ranking of the over or underperformance detected. In some cases, changes to the configuration or the underlying algorithms might also affect what stories are displayed. It's possible that a story in a given dimension, such as Org, Mgt Level, or Region, appear again after the monthly data refresh. The repetition implies that the performance gap or trend identified in the previous month remains statistically significant and ranks among the top stories for the business question in the current month. Users can still view performance numbers that include the most recent monthly update.
How does the scoring method for stories work?	The scoring algorithm takes these factors into account: • Statistical significance of each story. Is the detected change of the trend or deviation from population average important enough? • Value of a story. What is the calculated impact on the business question? • Relationship to the other stories. Is this story a driver of another story, the effect of another story, or part of other similar stories?
Why do some stories have only 2 top drivers and others 10?	Workday curates the list of dimensions for analysis depending on the business question to ensure that Storyteller provides the most relevant analytical slices. Within those dimensions, Storyteller displays the top 10 drivers that significantly contribute to the metric performance in a story.
How does cardinality impact People Analytics?	Cardinality defines the size of the population in the dimension, directly impacting what stories are surfaced as well as story quality and actionability. Smaller populations don’t provide interesting and meaningful insights, which can result in unnecessary iterations of the mapping process. A high cardinality can result in long computation time of the stories.
How can I view more information about a particular business question or metric?	You can click the information icon next to each business question or metric to view more information, such as: • Why a business question is important. • The metric that drives the business question. • The calculation behind a metric.

Why do some metric trends display in a neutral color?

The expected result for select metrics can vary across organizations, as some metrics don't follow a universally accepted trend.

Example: To establish parity in gender equality, an increase in female representation might be the expected direction for organizations that have a low percentage of females, while a decrease might be the focus for organizations where female representation is already at 70%.

To address differences in metric trends across organizations, we set a target range for these metrics:

- Average Span of Control for values between 5-15.
- Female Representation for values between 40-60%.

We display movement within these ranges in a neutral color. Movement towards these ranges displays in green, while movement away from these ranges displays in red.

All changes for the metric Average Target Compensation display in a neutral color, as individual cases can determine whether an increase or decrease is expected.

Related Information
Concepts

Concept: Storyteller Engine on page 12