People Analytics at
InnovateTech

Tristan How, Jiawen "Sadie" Li, Richa Shah, Tiange "Olivia" Zhang

AGENDA

I. INTRODUCTION

Meet our team + context of presentation.

II. SETTING UP THE FUNCTION

A roadmap for establishing the People Analytics team.

III. TEAM DEVELOPMENT & MANAGEMENT

Building the People Analytics team + roles and responsibilities.

IV. STAKEHOLDER ENGAGEMENT

Effective internal consulting — strong and strategic relationships.

V. INCORPORATING AI

Integrating AI into the People Analytics team's work.

VI. CONCLUSION

Wrap-up + Q&A

INTRODUCTION

OUR TEAM

Tristan How

Jiawen "Sadie" Li

Richa Shah

Tiange "Olivia" Zhang

SETTING UP THE FUNCTION

STEP 1: DEFINE THE CORE MISSION & OBJECTIVES

<u>Mission Statement:</u>

"To provide data-driven insights that empower InnovateTech's leadership to make decisions that optimize employee experience, drive retention, and power scalable workforce growth."

<u>Key Objectives:</u>

★ Support workforce development and talent acquisition
★ Enable hybrid work optimization
★ Enhance employee engagement and experience
★ Strategic alignment between IT, Tax, Executive Managers, Finance and HR departments

STEP 2: IDENTIFY FIVE PRIORITY BUSINESS ISSUES

1. Data silos and poor data quality
2. High employee turnover with no predictive models
3. Lack of visibility in remote/hybrid work productivity
4. Unclear performance and promotion criteria
5. Lack of executive buy-in for people analytics

STEP 3A: COLLECT THE DATA

System/Source:

★ **Hiring (ATS → HRIS)**

★ **Employee Lifecycle (HRIS → Performance System)**

★ **Engagement Monitoring (Surveys ↔ HRIS/Performance)**

STEP 3B: DATA COLLECTION PROCESS

System	Data Retrieved
Human Resources Information System (HRIS)	• Employee demographics • Tenure • Promotions • Attendance • Payroll, i.e., compensation, benefits

Applicant Tracking System (ATS)	• Recruitment data
	  ○ Candidate source
	  ○ New hire turnover rate
	• Internal mobility

Performance Management System	• Performance evaluations and ratings, along with manager feedback • Promotion history and eligibility • Employee productivity
Employee Engagement Surveys	• Engagement scores (KPIs) • Job satisfaction scores (KPIs) • Exit trends

STEP 4: DATA MANAGEMENT STRATEGY

Assess Existing Data Quality

Identify & Prioritize Data

DATA

Collect & Standardize Data

Centralize, Clean & Visualize Data

STEP 5: DATA DICTIONARY, SECURITY & PRIVACY

Data Dictionary: Ensure Consistency & Clarity

★ Establish a **centralized repository** for key HR data definitions

★ Standardize terms like:
  - **Retention:** Duration from hire to exit
  - **Engagement Score:** Composite score from survey metrics
  - **Turnover Rate:** % of employees leaving within a given time

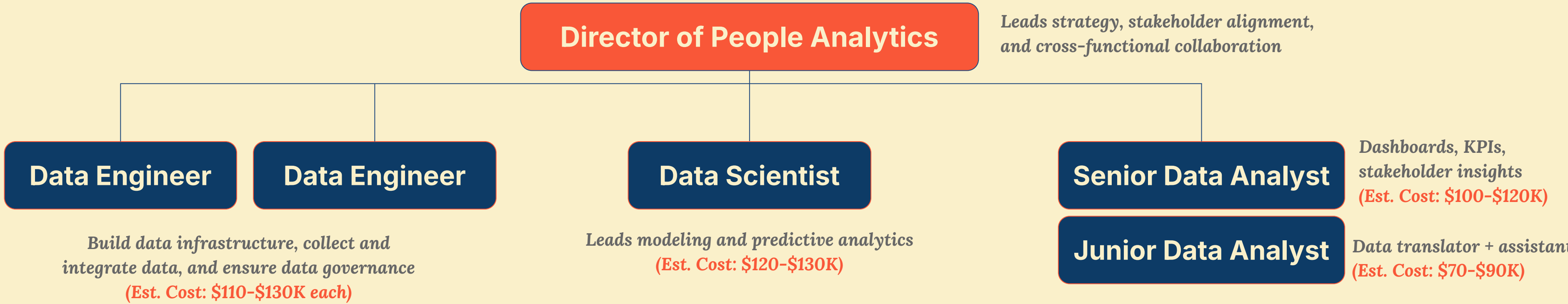★ Improves accuracy in **reporting, analysis, and cross-team collaboration**

Data Security & Privacy Strategy

★ **Phase 1: Immediate Measures (Pre-IT Support)**
  - **Restrict access** to authorized users only
  - Enforce existing cybersecurity protocols
  - Define **role-based access controls** (e.g., HR, Analytics, Executives)

★ **Phase 2: Post-IT Enablement**
  - Implement **encryption** for sensitive employee data
  - Set up **multi-factor authentication (MFA)**
  - Establish ongoing **access audits** and monitoring
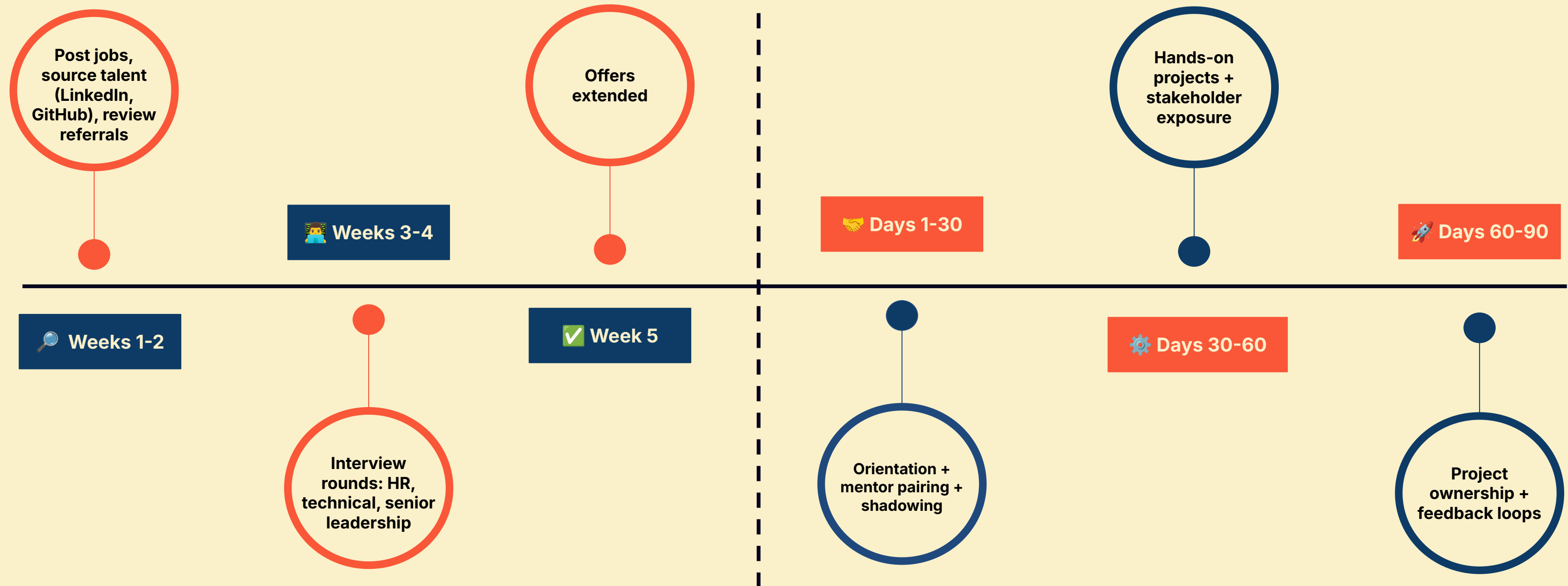
TEAM DEVELOPMENT & MANAGEMENT

TEAM STRUCTURE: BUILDING A HIGH-IMPACT PEOPLE ANALYTICS FUNCTION

Director of People Analytics

Leads strategy, stakeholder alignment, and cross-functional collaboration

Data Engineer

Data Engineer

Data Scientist

Senior Data Analyst

Dashboards, KPIs, stakeholder insights
(Est. Cost: $100-$120K)

Junior Data Analyst

Data translator + assistant
(Est. Cost: $70-$90K)

Build data infrastructure, collect and integrate data, and ensure data governance
(Est. Cost: $110-$130K each)

Leads modeling and predictive analytics
(Est. Cost: $120-$130K)

Why This Matters:

★ This structure aligns with InnovateTech's immediate needs: talent retention, engagement insights, hybrid model optimization

★ The team collaborates seamlessly: ***Data Engineers*** manage infrastructure, while ***Data Scientist and Data Analysts*** focus on insight generation and actionability.

HIRING & ONBOARDING PLAN

Post jobs, source talent (LinkedIn, GitHub), review referrals

Offers extended

Hands-on projects + stakeholder exposure

🧑‍💻 Weeks 3-4

🤝 Days 1-30

🚀 Days 60-90

🔍 Weeks 1-2

✅ Week 5

⚙️ Days 30-60

Interview rounds: HR, technical, senior leadership

Orientation + mentor pairing + shadowing

Project ownership + feedback loops

Best Practices:

★ Expedited hiring via pre-vetted referrals and streamlined interviews

★ Onboarding focus: culture, tools (BI, dashboards, data warehouse), and inter-team collaboration

★ Early-wins strategy: *Data Engineers* begin data consolidation; *Data Scientist* begins pilot models on retention and productivity; *Data Analysts* shadow stakeholder meetings

STAKEHOLDER ENGAGEMENT

KEY STAKEHOLDERS

C-Suite

★ CEO, CFO, CHRO, CDO/CTO*

★ COO

★ Gen Counsel

★ CMO

★ EVP Comms

Managers

★ Valuable Intermediaries

★ Key for Implementation Strategy

★ Training Necessary

Employees

★ Directly Impacted

★ Transparency

★ Feedback

EXECUTIVE ALIGNMENT + INTERNAL BUY-IN

Executive Storyline

- ★ Tailored Messaging
- ★ External Consultant Expertise
- ★ Support with Data

Manager Buy-in

- ★ Clear Identity
- ★ Training modules
- ★ FAQ Forum

Employee Buy-in

- ★ Clear Identity
- ★ Transparency
- ★ Anticipate Objections

COMMUNICATION STRATEGY: NEXT STEPS

Internal Communication

- ★ C-Suite
  - ○ CEO, CHRO, CFO, CTO/CDO*
- ★ Managers
  - ○ Forum
  - ○ Feedback
- ★ Employees
  - ○ Newsletter
  - ○ Managers

External Communication

- ★ Channels
- ★ Key Themes
- ★ Maintain Reputation

Next Steps

- ★ Monitor:
  - ○ KPIs
  - ○ Cost
- ★ Post Implementation review

AI

INTEGRATION

STRATEGIC AI INTEGRATION

Predictive Attrition

★ Detect early warning signs of disengagement or dissatisfaction working with the PA Data Engineers + Data Analysts

Workforce Planning

★ Predict future talent needs by department, location, or skill type

Intelligent Talent Matching

★ Analyzing employee internal data with job requirement to suggest role fits within the organization

Generative AI for Survey Analysis

★ Analyze employee survey responses
★ Summarize key findings
★ Detect trends across departments

AI-Powered Learning

★ Assess employee skill gaps
★ Recommend personalized training paths

Generating Reporting

★ Explain key trends in attrition, DEI progress, engagement
★ Analyze workforce insights

RISK ASSESSMENT & MITIGATION PLAN

Privacy and Data Security

- ★ Enforce strict access controls
- ★ Conduct regular audits to ensure compliance with privacy laws

Bias and Fairness

- ★ Implement bias audits to correct discriminatory processes
- ★ Involve human oversight
- ★ Train AI models

Transparency and Trust

- ★ Use easily explainable and accessible AI models

Job Displacement and Resistance to Change

- ★ Provide training
- ★ Work with Senior Leadership to communicate the role that AI will play in the organization

Data Quality and Integration

- ★ Collaborate with IT and Data teams
- ★ Issue data quality control

Lack of AI Fluency

- ★ Provide AI literacy programs and data training for employees
- ★ Collaborate with IT departments

CONCLUSION

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By *setting up the People Analytics function*, *developing and managing our team*, *engaging our stakeholders*, and *implementing an AI strategy*, this is how our People Analytics team will bring value to InnovateTech:

- Empower strategic, data-informed decision-making

- Enhance the employee experience and reduce attrition

- Strengthen cross-functional collaboration and increase the influence of the workforce

- Lead AI transformation initiatives and drive operational efficiency

- Anticipate an estimated ROI of 123%

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APPENDIX

STEP 4: DATA MANAGEMENT STRATEGY

Assess Existing Data Quality
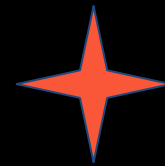
Identify & Prioritize Data

!! High Priority: Tenure, performance, engagement scores, compensation, exit interviews
Medium Priority: ATS insights (candidate source, internal mobility)
Low Priority: Attendance, perks, general workforce data

DATA

Automate extraction and align data formats:

★ Pull data from HRIS, ATS, performance systems, and surveys
★ Map related fields across systems (e.g., employee ID, job level)
★ Standardize units, formats, and time frames for clean integration

Collect & Standardize Data

Centralize, Clean & Visualize Data

★ Consolidate data in a **central data warehouse**.
★ Clean, structure, and manage the data for consistent use.
★ Deploy a **BI dashboard** for real-time metrics on retention, performance, and engagement.
★ Provide **decision-ready insights** to leadership.

RISK ASSESSMENT & MITIGATION PLAN (FULL)

Key Risk Identified	Potential Impact	Mitigation Strategy
Privacy and Data Security	- Employees may become hesitant towards sharing data. - Non-compliance with data protection laws could lead to legal ramifications.	- Enforce strict access controls. - Conduct regular audits to ensure compliance with privacy laws.
Bias and Fairness	- Biased data can reinforce existing gender, racial, or socioeconomic disparities. - Unfair biases could damage Innovate Tech's reputation. - Bias can lead to legal scrutiny.	- Implement bias audits to correct discriminatory processes. - Involve human oversight in all AI-powered decision-making. - Train AI models on diverse datasets to minimize bias.
Transparency and Trust	- Employees may be hesitant to trust or adopt AI-powered insights. - Lower employee morale and motivation.	- Use easily explainable and accessible AI models. - Communicate the role of AI and how it seamlessly integrates with employees.
Job Displacement and Resistance to Change	- Employees may resist AI adoption initiatives. - Employee morale, engagement, and productivity may be at risk.	- Provide training and upskilling opportunities for employee. - Work with Senior Leadership to communicate the role that AI will play in the organization.
Data Quality and Integration	- Incomplete data can lead to misleading analysis. - Inaccurate data can lead to faulty decision-making.	- Collaborate with IT and Data teams to ensure standard data collection. - Issue data quality control measures and frequent auditing.
Lack of AI Fluency	Learning curves and misinterpretation of AI insights may decrease efficiency, slowing down decision-making and reducing productivity.	- Provide AI literacy programs and data training for employees. - Collaborate with IT/Data departments for user training support. - Ensure that AI tools adopted are user-friendly.

COSTS, ROI & ETHICAL RISK BREAKDOWN

1. Costs:
   a. Team building / Internal hiring costs
   b. External communication campaign for stakeholder engagement
   c. Hiring third-party vendor for AI strategy

Role	Qty	Salary Range (USD)	Est. Total
Director of People Analytics	1	$150,000	$150,000
Senior Data Analyst	1	$100K - $120K	$110,000
Junior Data Analyst	1	$70K - $90K	$80,000
Data Engineers	2	$110K - $130K	$240,000
Data Scientist	1	$120K - $130K	$125,000
Subtotal			**$705,000**

   d. Other costs:
      External vendor support for AI strategy: ~$100,000
      Communications, training, and tools: ~$45,000
      Total Year 1 Cost: ~$850,000

COSTS, ROI & ETHICAL RISK BREAKDOWN

2. Benefits:

- **Reduced employee turnover (projected 30% reduction)**
  - Assume 300 departures per year
  - Average replacement cost per employee: $15,000
  - 30% reduction = 90 fewer exits → Savings: $1,350,000
- **Increased productivity & engagement**
  - Estimated 2% improvement in productivity
  - If total payroll is ~$20M, then Value of gain: ~$400,000
  - Better hiring/internal mobility through ATS + AI
  - Time and cost savings in recruiting = ~$150,000
  - **Total Estimated Benefit**: $1,350,000 (turnover) + $400,000 (productivity) + $150,000 (recruitment) = $1,900,000

COSTS, ROI & ETHICAL RISK BREAKDOWN

3. ROI

    a. Strengthen ROI by reducing turnover, increasing employee engagement, and optimizing the hybrid model = cost savings overall

    b.

$$\text{ROI} = \frac{\text{Benefits} - \text{Costs}}{\text{Costs}} = \frac{1,900,000 - 850,000}{850,000} \approx \mathbf{123\%}$$

COSTS, ROI & ETHICAL RISK BREAKDOWN

4. Ethical Risks:

- Data Privacy and Confidentiality
- Informed Consent and Transparency
- Fairness and Bias Prevention
- Accountability and Governance
- Purpose Limitation
- Psychological and Workplace Impacts