



At a glance

Organisation
Genea Limited

Industry
Health Technologies

Location
Sydney

Objective
Enhance HR's ability to service the business by using business intelligence software and analytics to obtain new insight and drive the development of future HR strategies.

Challenges

- Limited available HR data made it difficult to make informed decisions
- Lack of data made reporting particularly time-consuming
- Manual preparation of data meant there was no certainty of accuracy in the figures

Solution

QlikView business intelligence and data visualisation solution

Benefits

- Accurate knowledge about the workforce has replaced assumptions, enabling better targeting of HR strategies
- Visibility into learning and development activities by department, manager and individual
- Time required to prepare board reports for learning and development activities has reduced one day to two minutes

IVF Pioneer Delivers New HR Initiatives With Qlikview

Since 1986 Genea has been leading the world in fertility services. Formerly known as Sydney IVF, the organisation was one of the earliest pioneers of infertility and IVF (in vitro fertilisation) treatments. Today IVF and fertility services form only one part of Genea's expanding field of operations, with other activities including research and supply of stem cells, biomedical technologies and consulting services.

The imperative to learn

Genea's human resources department is responsible for a workforce of just over 350 full time employees. It's a busy department that manages every aspect of the company's medical, technical and administrative workforce including compensation, employee relations, recruitment and learning and development.

The need for data

Historically, the HR department relied on Excel spreadsheets for manual data collection and reporting. The processes for obtaining any insights were difficult and time consuming. As a result, the only HR data readily available was the company's staff turnover rate and the sick leave rate.



Anne Shen, Genea's Payroll Manager, admits, "We really couldn't obtain a lot of other data around HR."

It was a similar story when it came to training. Alexandra Lederer, Learning and Organisational Development Manager at Genea explains, "All we could get were very simple statistics, which made it hard to have accurate visibility of what was occurring. This also made it difficult for us to make informed decisions."

It took a full day every month to simply compile the learning and development data required for board reports. On top of this was the time required for analysis. Even so, Lederer could never be certain the data was accurate given the manual preparation methods.

An HR dashboard

Two years ago, with encouragement from a newly appointed HR Director Andy Brown, Shen led the push for a project to develop a business intelligence (BI) capability. Specifically, she wanted the department to take data from the company's PayGlobal payroll, learning and development system, and present it in an HR dashboard for fast access to key metrics. The aim was to obtain more valuable insights into the company's workforce, to better understand staff trends as well as the factors affecting performance.

Shen says, "We engaged consultants who did a lot of research to work out what data and metrics we would need. Deciding what to focus on out of the many potential metrics was critical to the project."

To build this new analytic solution, the HR team adopted QlikView, a leading BI tool set which the organisation had previously used in an earlier project. Development was kicked off by the company's BI manager and to bring the project to completion, Genea engaged IT partner, Professional Advantage.

Understanding the workforce

Initial effort focused on developing a dashboard that could provide HR data to two distinct audiences. High level data was required for the CEO and board, while executives and management of the company's four business units would need more functional data.

One of the key challenges facing Shen however, was the lack of data to work with. She says, "The data we wanted to capture had to address the human side of things. We wanted to understand the demographic of the company, such as age,



gender, diversity of work and so on. We also needed to capture tenure and key dates including arrival and departure."

To build the necessary data sets, Shen introduced a new starter survey to identify what attracts staff to Genea, a quarterly staff survey aimed at understanding what drives retention and she began capturing exit interview data. Portions of each survey were fed into the dashboard to help build a better picture of Genea's workforce.

As the dashboard took shape, more metrics were introduced relating to turnover, recruitment efficiency and absenteeism. With each addition, the value of the dashboard to users has increased, and the company's understanding of its staff capabilities and needs has grown.

Learning about learning

One of the final areas to be addressed was learning and development. Here, the information provided by the dashboard helps HR staff to track performance indicators and information such as who and what departments are engaging in learning and development, the type of training that is being undertaken and the status of mandatory training.

The dashboard also provides a more unusual view of activity. Lederer explains, "Typically, people report on what has happened but Professional Advantage has taken the approach of building a report to show what hasn't happened. As an example, I can look at the dashboard to find which departments haven't done any training over the last two or three months. That raises the question of why? I can then have a discussion with the business and see if it's because the department is short staffed. Perhaps they don't see learning as relevant. They may have no budget or their managers don't support learning and development. It's a very useful view."



The method

Lederer says, "The hardest part of the project has been working out what metrics are useful to us as a business. With any BI tool, basically the dashboard is only going to be interesting if you pick the right measures, so you need to know why you want a particular metric, how it is going to help you and how you are going to get that data."

At the same time, she cautions, "Too many metrics can kill the value. You have to remember the point is not to measure but to take action for the business."

Shen agrees. "The design and the data you choose to use are very important. It is this that provides the insight to identify issues within the business that we can turn to action. Even though we now have the dashboard implemented, we're still trying to improve it and add any metrics that we think could provide benefits or new insights."

Using insights for strategy development

Every month the HR team meets to review the dashboard and take action on the information. Where necessary, strategies are adapted or new strategies introduced.

One example of this is a recent change in focus for Genea's well-being strategy. In the past many of the well-being activities were physical and male-oriented. This seemed fine until the dashboard revealed the true make-up of Genea's workforce.

"We realised 86 per cent of the staff are women and they around 35 years of age. So we had to question ourselves and ask whether boxing was really the best activity for them. We've since changed the well-being offering to better suit our target population," Shen says.

Insights have also led to changes to the company's parental leave policy in a bid to develop a better employee proposition, one that will help Genea to better attract and retain staff.

Since introducing QlikView, the HR team has found board reporting has become much easier and much faster. It used to take Lederer up to a full business day to analyse learning and development data so that she could produce the reports. Today, with the help of QlikView, the process takes less than two minutes.



Looking to the future

In 2015, Genea is rolling out its annual performance review process. With many new leaders recently appointed, Lederer is using the HR dashboard to monitor that they all receive the appropriate training prior to beginning the reviews. It's a simple check that couldn't have occurred prior to the deployment of QlikView.

Both Lederer and Shen remain keen to find new ways to use the BI platform to improve HR service delivery and neither is afraid of taking a longer-term view. One concept Shen is currently exploring is the idea of working with department heads to identify and design metrics specific to each department's needs. While it would be a major project, Shen recognises the immense potential business value for Genea.

For Lederer, one of the most exciting possibilities is to combine the learning and development data with performance review data. By doing so, Lederer hopes to develop an accurate picture of the company's performance by department, by manager, and to see where groups are exceeding expectations. The data will also enable her to map core competencies and expertise.

"In the past we've had to compile this information by hand and it's been a nightmare. With QlikView we have the tool to make it work and to take HR analysis to a new level," Lederer concludes.

"The whole system is fabulous," Lederer smiles. "Professional Advantage has done an amazing job in using great visualisation and I find it so easy to use."

About us

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