How Salesforce Uses Tableau for HR Analytics

Create data-driven people insights

TABLE OF CONTENTS

Introduction

Human Resources (HR) teams have been hit hard by new and unexpected challenges in recent years, with little sign that changes will slow. After being forced to navigate the pandemic, HR departments are now juggling evolving flexible-work arrangements, labor shortages and attrition, and budget cuts—all while driving employee engagement and diversity, equity, and inclusion (DEI) recruitment.

Given these increasing headwinds, companies are asked to do more with less. It is time to find greater operational and cost efficiencies within your existing people, processes, and systems. Thankfully, organizations can **use data to make good decisions quickly and take action**.

Data has never been more relevant because it helps us solve critical challenges and make good decisions. But how do organizations—and HR teams—access, analyze, and understand their people data to inform their decisions?

With Tableau, HR and people analytics teams can move fast, tackling high-priority use cases and quickly turn around accurate reporting when leaders ask for it. The platform helps HR professionals be nimble, make the most of their resources, and solve common challenges around data onboarding, dashboard creation, metric calculations, and more.

Read on to learn how Salesforce, our customers, and our partners use the Tableau platform for HR Analytics. This ebook will help your HR and people analytics teams:

- Quickly deliver employee experience, engagement, and development insights
- Foster collaboration to handle recruitment and attrition challenges
- Optimize your impact on DEI efforts using data-driven approaches

Quickly deliver employee experience, engagement, and development insights

Leadership needs to have their pulse on the company to understand short and long-term trends on employee behavior, engagement, development, and recruitment numbers. But as recent global crises and economic uncertainty have shown us, leaders also need to be efficient when understanding and responding to internal and external crises. So HR and/or people analytics teams are expected to provide data and insights to leadership quickly, but they're often at the mercy of data engineering teams that manage the disparate systems and applications they use.

Adding to the challenges, many HR organizations are small and under-resourced, forced to be scrappy, tasked with gathering, analyzing, and reporting back on often restricted data from many different sources. Because there is always more work to be done than headcount allocated to people analytics, it is critical to invest in tools and processes that are nimble, easy to use, and scalable.

Did you know?

Within Salesforce, there are candidate and employee recommendations for action items and improvement areas generated by artificial intelligence (AI) with Einstein Discovery. For example, the New Hire Wizard suggests the next best action to onboard and set up a new employee for success.

Check out Einstein AI →

Enable faster decision making with real-time business intelligence

Tableau for HR and people analytics helps you respond to requests quickly, while also proactively enabling faster decision making. Whether you're working with an independent engineering team or managing your own reporting, you can begin building dashboards to take a closer look at your experience, engagement, and development data.

All companies suffer the cost of disengaged employees. To address this at Salesforce, we used data to drive our Work.com employee experience platform. In the "Discover the Next Generation of Employee Engagement" webinar, we reimagined and implemented our employee journey from hire to retire. Watch the presentation to learn more about the Global Headcount Report and HR Annual Planning Dashboard, which HR leaders and teams can use to build a 360-degree view of their employees and candidates.

These dashboards, which we also use on the Salesforce People Analytics team, can integrate with core HR systems like Workday, SAP, and others using native connections and/or APIs, powering trusted data with flexible, secure governance. Integrating with other systems and software in Salesforce allows us to create a single layer of engagement with all of our people data in one place, helping leaders track employee engagement, apply AI recommendations for improving performance, and more.
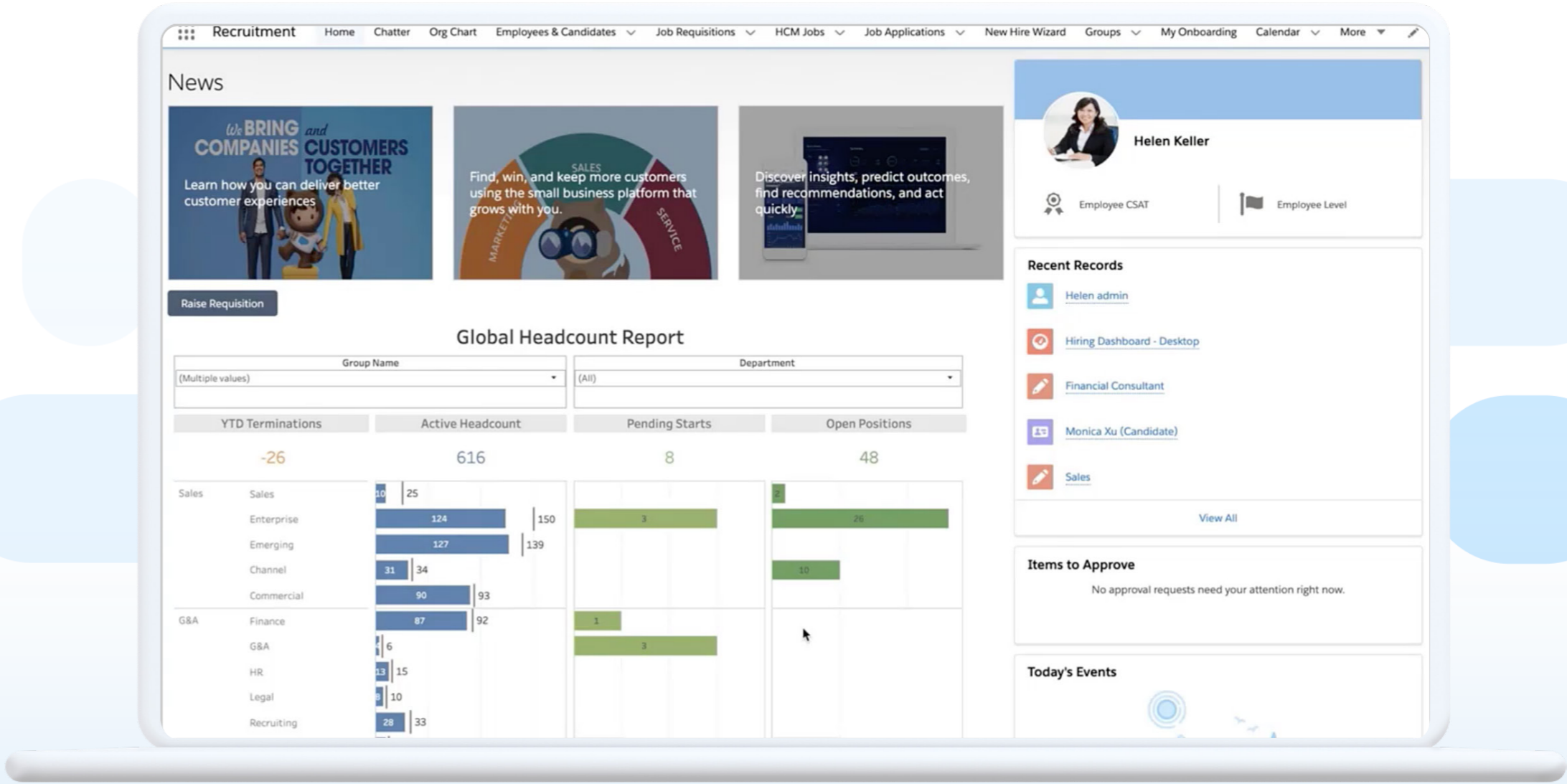
The Salesforce Global Headcount Dashboard helps HR leaders track open headcount and candidates' progress through stages, take action on AI-driven recommendations, and more.

Watch the presentation →

Foster collaboration to analyze turnover, attrition, and recruiting

Employee attrition and retention data is mission critical in the current labor market. Having insights into why employees leave, how long employees stay, which departments have the highest turnover or retention rate are necessary to make the changes to retain people and grow their satisfaction and engagement. This can only be done if leadership, HR, and business units break down silos and drive alignment to tackle these complex, interdependent problems by sharing data and committing to common goals.

This Employee Turnover Dashboard by Lovelytics is an excellent example of what a Tableau dashboard can do to foster collaboration between departments and power data-driven decision making around slowing turnover from certain departments or uncovering unknown causes in high attrition.

The Employee Turnover Dashboard by Lovelytics helps organizations view the breakdown of employee departures by type, position, department, quarter, and reason for leaving.

Explore the dashboard →
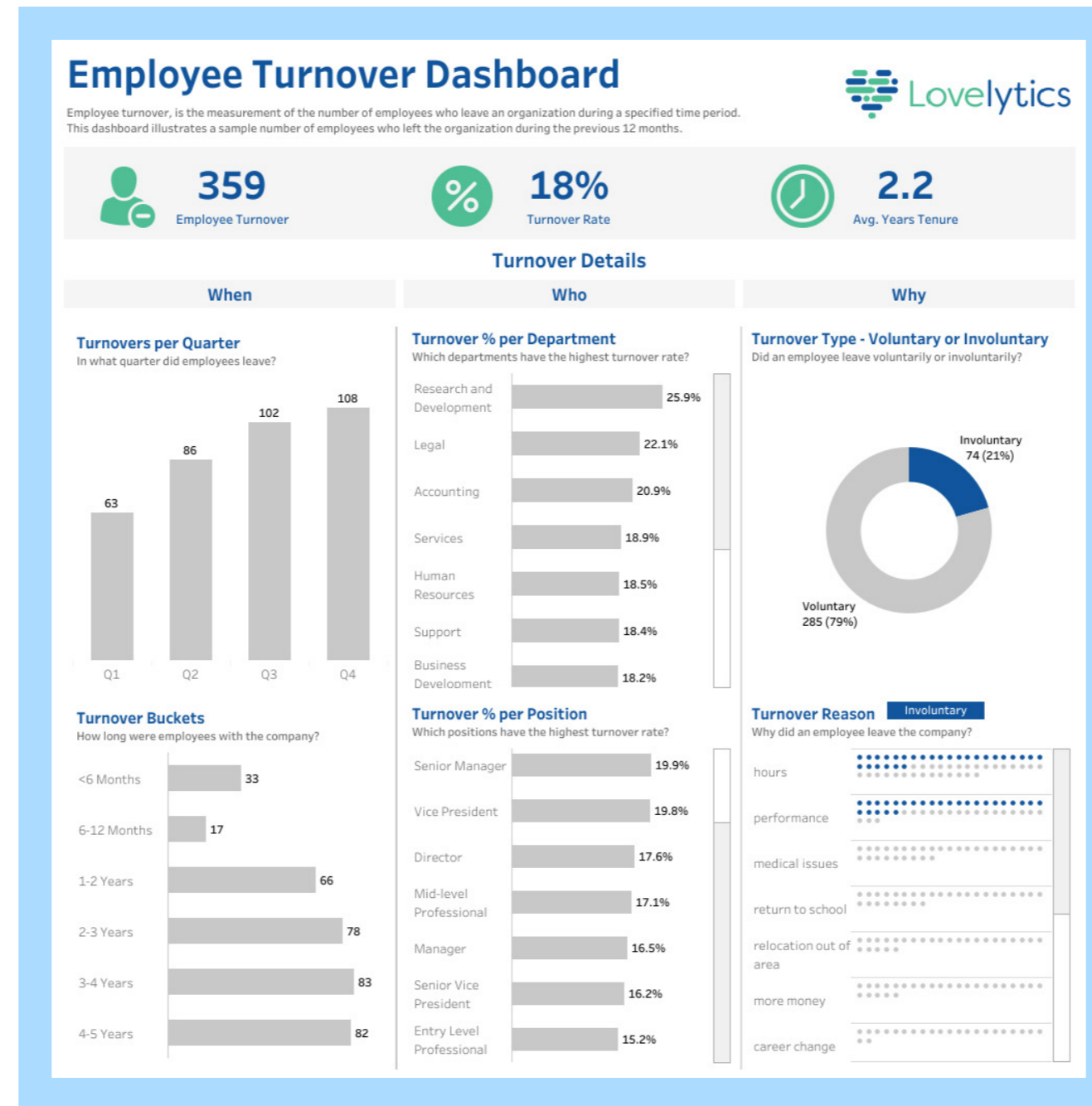
Quick tip

If you're not confident about working with data or building your own dashboard from scratch, don't worry! Tableau Accelerators help you spin up HR-specific dashboards in minutes using your own data– and at no additional cost.

Get HR Accelerators →

Optimize your impact on DEI efforts using data-driven approaches

At Salesforce, we work to fairly and systematically promote and compensate our employees, improve the employee experience, and create a more diverse, equitable, and inclusive workforce by using data and analytics. We see our customers and partners across regions and industries use similar data-driven approaches to prioritize their diversity, equity, and inclusion (DEI) efforts and increase the impact of their DEI programs by collaborating and acting on real-time insights.

Research shows that DEI practices offer many benefits including increased employee engagement and greater levels of trust and productivity. Another perk? Inclusive companies are 60% more likely to outperform peers in decision making.

Our higher education customers like Cornell, University of Alabama, Princeton, and MIT, among others, use Tableau dashboards to track and measure the diversity of their undergraduate and graduate students, and faculty, tracking underrepresented minorities over time. MIT's Diversity Dashboard digs deeper into its community, organizing and exploring the intersectionality of gender, race, and ethnicity data by school, degree, graduation rate, and more. Understanding the gaps in creating a more equitable and inclusive community helps organizations take action and grow impact.

Want more HR analytics tips and tricks?

Join the HR Tableau Community User Group to get analytics tips and tricks, and post and answer questions from your peers working with similar people data.

Join the User Group →
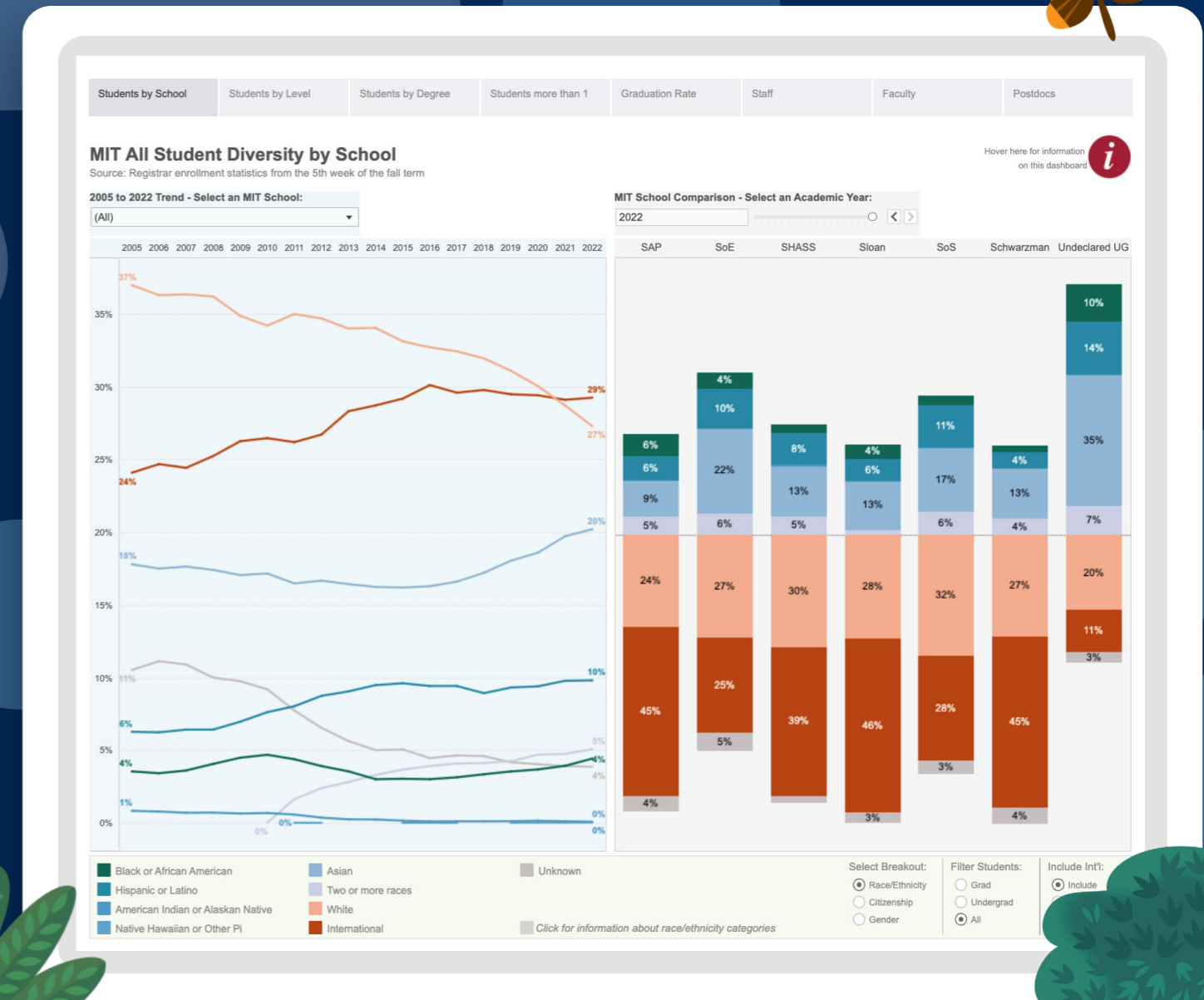
The MIT Diversity Dashboard explores the gender and race/ethnicity of the MIT community.

Explore the dashboard →

How HR teams use Tableau

Discover how HR teams use Tableau to improve speed to insight, foster collaboration, and optimize their impact

Tesco uses Tableau to better understand employee training needs

Tesco is using Tableau within its Customer Engagement Center in order to better understand the training needs of over 1,000 employees, as well as demonstrate a tangible return on investment (ROI) on its Learning and Development (L&D) program with data-driven insights. By connecting disparate data sources in one dashboard, Tableau enables Tesco to drastically improve speed to insight. Tesco is also able to identify trends about learning and development so they can deliver impactful L&D programs for employees and the business.

Read the story →

Walmart uses Tableau to make faster decisions for people analytics

The Walmart Global People Analytics team, a division of human resources, provides people analytics to leaders and project owners worldwide. In a series of videos, Adrian Goh, manager of Global People Analytics at Walmart, speaks about how with Tableau, the team can take a question from an executive and immediately adjust its dashboard to get an answer in minutes.

Adrian's team has moved from basic Excel spreadsheets to rich data visualizations that can be updated in real time and used to tell persuasive stories using HR data. These visualizations and stories are shared easily across teams to foster collaboration with teammates, stakeholders, and leaders alike.

Read the story →

Australian Financial Security Authority drives enterprise-wide workforce insights with Tableau

The Australian Financial Security Authority (AFSA) is an executive agency in the Attorney General's portfolio, with broad-ranging services aimed at securing Australia's economic health and security. While AFSA currently enjoys enterprise-wide analytics adoption with Tableau, their self-service analytics model began with the workforce analysis done by the Human Resources team.

The HR Workforce Analytics and Planning team achieved major time savings with Tableau, moving into advanced workforce planning with predictive and prescriptive workforce data modeling. These models helped them monitor trends to maximize opportunities and minimize risk, informing critical operational decisions. This success led to Tableau becoming the end-to-end platform for all AFSA people managers to access reliable insights on their workforce.

Read the story →

Make good decisions for your people using Tableau

Tableau changes the way human resources teams see their people, helping them make better decisions with their data. By bringing together the data HR teams need, safely providing stakeholders access to trusted sources of truth, and surfacing insights with intuitive, powerful analytics, Tableau makes data a key business strength, critical in the face of uncertainty and change. If you want to turn your data into a resource to recruit more efficiently, ensure a safe and equitable workplace, or create best-in-class employee experiences, then try Tableau for your HR organization.

Try Tableau for free →

Resources

Learn more at the [Tableau Human Resources Analytics solutions page](#)

Discover [HR dashboards from the Tableau Community](#)

Join the [Data + Diversity User Group](#)

Tableau helps people see and understand data. Tableau offers visual analytics with powerful AI, data management and collaboration. From individuals to organizations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions.

Tableau also integrates with Salesforce Customer 360–a customer relationship management (CRM) platform that connects the business with a shared view of customer data–giving every department access to the most powerful, comprehensive, and intuitive analytics features embedded directly into workflows. By bringing your customer data to the center of your work, you can grow your relationships with your customers and employees.