



Optimizing Workforce Planning: A Case Study of Leave Management Solutions

WHO WE ARE

“UB Technology Innovations is a leading provider of Power BI services, offering expertise in crafting exceptional dashboards. Our expertise assists clients in their digital transformation endeavors by streamlining the process and gaining a competitive advantage through rapid app deployment”



WHAT WE DO

- Streamlined data management process
- Cost-effective
- User interface
- Sustainability
- Scalability



THE CLIENT

Our client has evolved into a leading non-governmental organization, extending its reach to remote rural villages of Nairobi. With a devoted team of over 1700 Kenyan staff members, a global network of partners and leaders, and the unwavering support of missionaries, the organization has become a beacon of hope for countless children and families.



CHALLENGES

The organization faced several challenges:

1. Designation-Based Leave Management: The institution struggled to gain insights into different leave patterns based on employee designations (teaching vs. non-teaching), resulting in a lack of clarity regarding inconsistencies in leave trends.
2. Monthly Leave Tracking: There was a lack of clarity regarding the average leave count per employee, making it difficult to monitor usage and trends effectively.
3. Leave Allocation and Staff Count: The organization required a dashboard to identify leave usage trends and gaps based on the number of staff in each category, which had not been established.
4. Approval Process: The existing system did not effectively track approved versus unapproved leaves, resulting in confusion regarding leave counts and percentages.
5. Upcoming Leave Visibility: The absence of mechanisms to provide visibility into upcoming leaves created difficulties in anticipating potential gaps in resource availability.
6. Dashboard Requirements: A comprehensive dashboard was required to generate insights based on projects and departments, emphasizing the top five centers with significant leave-related challenges.
7. Gender Demographics: Understanding the distribution of male and female staff concerning leave usage was also a challenge that needed addressing.





SOLUTION

To address these challenges, the organization implemented a Power BI dashboard specifically designed for employee leave management. The key features of this solution included:

- **Designation-Based Leave Tracking:** The dashboard categorizes leave by designation, allowing for tailored management strategies for teaching and non-teaching staff.
- **Monthly Leave Analysis:** It provides analytics on average monthly leave counts per employee, enabling better forecasting and planning.
- **Leave Allocation System:** A structured approach to allocate different types of leaves based on staff count in various categories was established.
- **Approval Workflow Management:** The dashboard tracks approved and unapproved leaves, offering real-time data on leave counts and percentages.
- **Upcoming Leave Notifications:** Alerts for upcoming leaves are integrated into the dashboard to enhance planning capabilities.
- **Organizational Dashboard Features:**
 - Project-based and department-based views were created to analyze leave patterns effectively.
 - Identification of the top five centers with the highest leave requests or issues was implemented for targeted interventions.
- **Demographic Insights:** Gender-based analytics were included to assess differences in leave usage between male and female staff.

The screenshot displays the 'Employee Leave Approval' interface for Missions of Hope International. The header includes the organization's name, navigation links for 'Dashboard', 'Employee', and 'Payroll', and a user profile for 'Rashida | Kenya'. The main content area is divided into several sections:

- Employee Information:** Fields for First Name (Bindu), Middle Name, Last Name (B), Employee Number (ST100003/2024), and Center/Department (Payroll Department).
- Leave Information:** Fields for Leave Type (Annual), Leave Period (21/10/2024 00:00 - 23/10/2024 00:00 (3 Days)), and Attachment.
- Work Flow:** A vertical sequence of steps: 'Bindu B Submission' (green), 'Senior HR officer Approval' (green), and 'HR Manager Approval' (blue). Below these are buttons for 'Approve' (green), 'Deny' (red), and 'Send for Clarification to Previous Step' (orange).
- History / Comments:** A list of actions with timestamps and comments. For example, '01/10/2024 Bindu B has submitted the employee leave for approval' and '01/10/2024 Julie J has approved the Employee Leave Approval'.

At the bottom, there is a legend for 'Future', 'Current', 'Completed', and 'Invalid due to denial', along with a copyright notice for 2025 and a version number 'MHOE Portal version'.





SOLUTION BENEFITS

The implementation of the Power BI dashboard yielded several benefits:

- **Improved Efficiency:** Streamlined processes reduced administrative workload related to leave management, allowing HR personnel to focus on strategic initiatives.
- **Enhanced Compliance:** By clearly tracking different types of leaves and maintaining records of approvals, the organization ensured compliance with labor laws and internal policies.
- **Data-Driven Decision Making:** Access to real-time data allowed management to make informed decisions regarding staffing and resource allocation based on anticipated absences.
- **Increased Transparency:** Employees gained clarity regarding their leave entitlements and usage, fostering a culture of accountability within the organization.
- **Proactive Management:** Upcoming leave notifications enabled managers to anticipate staffing shortages, facilitating better planning for projects and departmental needs.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



UB Technology Innovations, Inc.
2401 E Katella Ave, Suite 450
Anaheim, CA 92806



www.ubtiinc.com



[company/ubti](https://www.linkedin.com/company/ubti)



info@ubtiinc.com



+1 (714) 912-1600



Connect us

