

DATA STORYTELLING WORKSHOP | DAY 2 CASE STUDY (HR TRACK)

Hired Fast, Gone Faster

Bank Harmoni Berhad: what is happening to our new frontline hires? Participant Guide & Step-by-Step Instructions

Item	Details
Case department	Human Resources (HR Business Partnering, Talent Acquisition, Learning & Development, HR Operations)
Your role	HR Business Partner for Retail Operations
Data file	BankHarmoni_HR_CaseData.xlsx (4 sheets, 917 employee records)
Team size	3 to 5 people
Time	About 2.5 hours of team work + 5-minute presentation per team
Framework	D-S-V: Data first, then Story, then Visual. Do not open a chart tool before Step 9.
Good to know	You only need basic Excel: filters and one or two pivot tables. Helper columns are already added. All data is synthetic; no real employee data is used.

1. The situation

It is late September 2026. You are the **HR Business Partner** supporting Retail Operations at **Bank Harmoni Berhad**, a fictional Malaysian bank. This email arrives from your CHRO:

From: Datin Sharifah Nor, Chief Human Resources Officer

Subject: Frontline hiring for 2027, what does the data say?

Hi,

At the **FY2027 Workforce Planning Review on 15 October**, Kenneth (Retail Operations) will ask us to approve **200 new frontline hires** for Contact Centre and Branch Operations, all using the **1-week Fast-track onboarding** his team started in April 2025.

Kenneth says Fast-track gets people "on the floor" quickly. But our team leaders tell me new joiners keep leaving and they are constantly re-hiring. Some people say it is because our pay is too low.

Before I agree, I want to know: **is Fast-track working, and what should we do for the 2027 hires?** You will have **10 minutes**. Please give me a clear story and a recommendation, not a pile of tables.

Thank you, Datin Sharifah

Why this case matters to HR

Every HR team faces this pressure: business leaders want people **fast**, HR must make sure they **stay and perform**. Reports such as attrition, onboarding and engagement dashboards only make an impact when they are turned into a story a business leader can act on. That is what you will practise today.

Who will be in the meeting

Person	Role	What they care about
Datin Sharifah Nor	CHRO (decision maker)	Keeping good people, HR budget, fair and sensible policies. Wants a clear recommendation.

Person	Role	What they care about
Mr. Kenneth Tan	Head of Retail Operations	Filling seats quickly to cut call-queue times. Introduced Fast-track and is proud of it.
Ms. Mei Ling	Head of Talent Acquisition	Her team is tired of re-hiring the same roles; cost-per-hire.
Encik Faizal	HR Finance Business Partner	Cost: onboarding spend vs replacement cost.

2. What you have

Sheet	What is inside
README	Case summary and tips
Employee_Data	917 employees hired Jan 2024 to Jun 2026. Status as at 31 Aug 2026. Includes department, onboarding programme, buddy, 90-day engagement score, exit date and exit reason
Data_Dictionary	What each column means, and how to calculate the early attrition rate
Business_Context	What changed and when, cost assumptions, the target, and meeting details

The one metric you need

6-month early attrition rate = hires who left within their first 6 months ÷ hires who have been with us long enough to know (at least 6 months).

Use the ready-made column **six_month_outcome**. Leave out "Too early to tell" (people hired from March 2026 onwards): we simply do not know yet whether they will stay.

The CHRO's target for frontline roles is **10% or less**.

3. Your deliverables

#	Deliverable	Step
D1	Short data check note: problems found and what you did	Step 2
D2	At least 3 insights written with the Insight Formula	Steps 4 to 6
D3	Story Space: which insights go into your 10 minutes	Step 7
D4	3C Story Canvas: Crowd, Content (S.T.O.R.Y.), Core (Main Point + Big Idea)	Step 8
D5	At least 1 chart with a takeaway title, chosen with AI's help	Step 9
D6	3 to 4 slide storyboard and a 5-minute pitch	Step 10

Suggested timing

Block	Steps	Time
Understand and prepare the data	1 to 3	30 min
Find and write the insights	4 to 6	45 min
Select and structure the story	7 to 8	35 min
Visuals with AI	9	25 min
Storyboard and rehearse	10	15 min

PART A | DATA: the 5-Step Insight Mining Framework

Step 1. Understand the context

Read the email, the people table and the **Business_Context** sheet. Answer together:

1. What decision will the CHRO make, and when?
2. What changed in April 2025, and for which departments?
3. Which departments did NOT change? (These are your comparison group.)
4. What does the CHRO believe might be the cause? What does Kenneth believe?
5. What would "Fast-track is working" look like in the data?

Output of Step 1

Complete: "We need to find out _____ so that the CHRO can decide _____ on 15 October."

Step 2. Check the data (quick audit)

The file has **3 small data problems** plus **1 thing you must handle correctly**. Use the filter arrows on the header row.

Check	How	What we found / did
Duplicate rows?	Data > Remove Duplicates on a copy of the sheet, or sort by employee_id	
Same department spelled differently?	Click the filter arrow on department and read the list	
Strange numbers?	Sort starting_salary_rm smallest to largest	
Who is "Too early to tell"?	Filter six_month_outcome. Should they count in the rate?	

Step 3. Build the foundation

Build these two starter pivot tables. They give you the "big picture" before you dig in.

Pivot 1: early attrition by department

1. Click inside Employee_Data > Insert > PivotTable > New worksheet.
2. **Filters:** six_month_outcome → untick "Too early to tell".
3. **Rows:** department. **Columns:** six_month_outcome. **Values:** Count of employee_id.
4. Right-click a number > Show Values As > **% of Row Total**. The "Left within 6 months" column is your early attrition rate.

Pivot 2: the trend over time

Copy Pivot 1 and replace department in **Rows** with **hire_quarter**.

Then add department to Filters and look at Contact Centre + Branch Operations vs the others.

Foundation number	Your answer
Total hires (after removing duplicates)	
Hires that can be measured at 6 months	
Overall 6-month early attrition rate	
Rate for Contact Centre + Branch Operations	

Foundation number	Your answer
Rate for all other departments	

Step 4. Hunt for patterns: the SCAN method

Look for the "interesting". Use each lens at least once and write down what you see.

Lens	What to look for	Example (general)	Try this in the case
S Spikes / Drops	Sudden changes	"March revenue jumped 45%: new product launch effect"	Early attrition by hire_quarter. When does it jump? Match it with the Business_Context timeline
C Comparisons	vs. last year, vs. target, vs. others	"Region A grew 30% while Region B declined 15%"	Frontline vs other departments; Full vs Fast-track onboarding; buddy Y vs N; vs the 10% target; hiring_source
A Anomalies	Outliers, unexpected behaviour	"Product X sells 80% on weekends only"	Filter Resigned: how many months did early leavers stay (tenure_at_exit_months)? Which exit_reason stands out? What are the 90-day engagement scores?
N No-change	Where you expected change but did not see it	"Despite a 20% price increase, demand stayed flat: inelastic"	Is pay really the reason? Compare starting_salary_rm of leavers vs stayers, and count "Better pay elsewhere" before vs after Apr 2025. Did other departments change? Does location matter?

#	Lens	What we noticed (with numbers)
1		
2		
3		
4		
5		

Step 5. Validate and refine

- **Right people counted?** Did you leave out "Too early to tell"?
- **Big enough group?** Be careful with groups under about 30 people.
- **Fair comparison?** Did the departments that did NOT change stay the same? If yes, your finding is stronger.
- **Second source?** Do exit reasons and engagement scores tell the same story as the attrition rate?
- **Cause or coincidence?** Say "strongly linked to" unless you are sure.
- **So what?** Would the CHRO care?

Step 6. Write your insights with the Insight Formula

The Insight Formula

[WHAT happened] + [WHY it matters] + [WHAT to do about it]

Weak (just an observation)	Strong (an insight)
"Sick leave went up."	WHAT: Medical leave days in Branch Operations rose 40% in Q3, mostly on Mondays after the new weekend rota. WHY: branches are short-staffed on the busiest day, and overtime cost is rising. WHAT TO DO: HRBP and Branch Heads to review the rota with staff within 1 month.

(This example is from a different topic, so it does not give away the case answer.)

#	WHAT happened	WHY it matters	WHAT to do about it
I-1			
I-2			
I-3			
I-4			

PART B | STORY: from insights to a story

Step 7. Decide what enters the Story Space

You will probably find more insights than you can use in 10 minutes. Keep only those that help the CHRO decide. Score each one:

Insight #	Matters to the CHRO? (1-3)	Big impact? (1-3)	Leads to an action? (1-3)	Checked in Step 5? (Y/N)	Decision: Story / Backup / Drop

Rule of thumb: 2 to 3 insights in the story; the rest become backup for questions.

Step 8. Build the story with the 3Cs

C1 | Crowd

Question	Your answer
Who makes the decision?	
Who else is in the room, and what do they care about?	
Who might disagree with us, and why?	
What do we want them to decide on 15 October?	

C2 | Content: S.T.O.R.Y.

Stage	Guiding question	Our content
S Situation	What is the starting point everyone agrees with? (e.g., why Fast-track was introduced)	
T Take-off	What changed, and what is the problem?	
O Opportunity	Where exactly is the problem, and what can we do about it?	
R Resolution	What do we recommend? Who, what, by when?	
Y Yield	What does the bank gain if we act? What if we do not?	

C3 | Core: the Main Point

Element	Our answer
Problem	
Stakes	
Steps	
Call to Action	

Our Big Idea (one sentence: our point of view + what is at stake)

Test: could the CHRO repeat it to the CEO in one breath?

PART C | VISUAL: design with AI

Step 9. Ask AI to recommend the chart

You already know your message, so let it choose the chart. Use your company-approved AI tool (e.g., Microsoft 365 Copilot).

Rules

- Share a **small summary table** from your pivot, never the full employee list. (With real HR data, this protects employees' privacy.)
- Tell AI your **message first**, then the data.
- Prefer simple, familiar charts (bar, line).
- Check every number AI shows against your pivot.
- You decide; AI suggests.

Prompt 1: set the stage (attach the SWD + AI Primer PDF)

Review the attached guide from storytelling with data and use these principles when we explore ideas or discuss, review, and create graphs, slides, and presentations. Prioritize simplicity, clarity, and audience focus in all future recommendations.

Context: I am an HR Business Partner at a Malaysian bank. I am preparing a 10-minute presentation for our CHRO about new-hire attrition and our onboarding programme. The Head of Operations, who designed the current onboarding, will be in the room.

My Big Idea is: [paste]. Confirm you understand.

Prompt 2: choose a chart (one per insight)

I want to explore chart options for one slide. Act as a thought partner.

My audience is: [e.g., our CHRO and Head of Retail Operations]

I want to show: [your takeaway in ONE sentence]

How it will be used: [one slide in a 10-minute live presentation; goal is to ...]

Here is my data: [paste your small pivot table]

Please suggest 2 to 3 simple charts that would work for this message and audience, and show them as images. For each, tell me what it makes easy to see and what it might hide. Use grey for context and one strong colour for the key point. Ask me questions first if anything is unclear.

If you get text instead of a picture, ask: "Can you render the graphs as actual images so I can compare them?"

Prompt 3: improve the chosen chart

Here is the chart I chose: [image]. What can I remove or simplify? Is it obvious where to look? Suggest a takeaway title of 12 words or fewer.

Prompt 4: prepare for questions

Here are my audience, Big Idea and slide titles: [paste]. What questions is the Head of Retail Operations most likely to ask to challenge me? Where is my story weak? Do not rewrite it.

Insight	Takeaway title	Chart AI suggested	Chart we chose and why

Step 10. Storyboard and present

Slide	S.T.O.R.Y. stage	Takeaway title	Chart / content
1			
2			
3			
4			

- 5 minutes to present to the "Workforce Planning Review" (the trainer and another team will play the CHRO and Kenneth).
- 3 minutes of questions. Expect Kenneth to defend Fast-track.
- End with a clear ask: "We recommend that on 15 October you ..."

How you will be assessed

Area	What good looks like	Points
Data	Duplicates and labels fixed; "Too early to tell" excluded; numbers correct	25
Insights	3+ insights with WHAT + WHY + WHAT TO DO	20
Story	Clear audience, S.T.O.R.Y. flow, one-sentence Big Idea	25
Visual	Simple chart, one highlight colour, takeaway title, AI used thoughtfully	20
Delivery	On time, clear ask, calm answers	10

Further reading: storytellingwithdata.com/makeovers | storytellingwithdata.com/ai