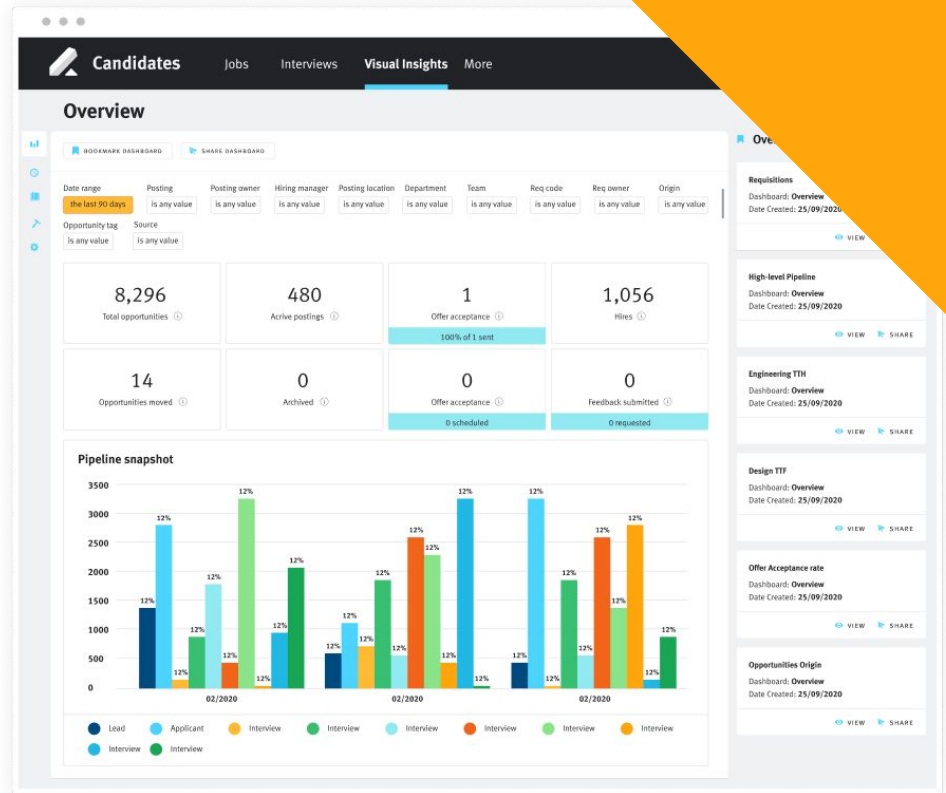




LEVER

## Visual Insights Knowledge Series

# Understanding Visual Insights for Talent Leaders and Talent Ops



# Today's Speakers



**Noa Monheimer**

Technical Product Manager



**Bahaar Cheema**

Technical Account Manager

## AGENDA

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- **Introduction to Visual Insights**
- **Visual Insights walkthrough**
- **Visual Insights by Role**
- **3 Ways Visual Insights Can Elevate Your TA Strategy**
- **Live Demo of Visual Insights**
- **Q&A**





## OUR MISSION IS

To offer talent leaders the **reach** of a marketing leader, the **forecast** of a sales leader, and the **insight** of a finance leader in a unified talent acquisition suite.

## BECAUSE WE BELIEVE IN THE VALUE OF

Connecting human potential to meaningful work.





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Introduction to:

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# Visual Insights



# **Poll: How familiar are you with Visual Insights?**

# We're hearing 3 major challenges



Talent metrics are **key to achieving hiring goals**



Heads of TA **do not have the resources they need** to make data-driven decisions



TA teams **spend time building spreadsheets and dashboards** by hand to help deliver insights

# Talent Leaders & Talent Ops

## Challenges

- Friction in pipeline
- Slow data refresh times
- Uncustomizable calculations
- Unclear areas of improvement
- Teams spending lots of time in offline spreadsheets



## Goals

- Streamlined pipeline processes
- Forecasted hiring trends
- Customized calculations
- Actionable areas of improvement
- Reporting provides insights without manual, offline work



## Outcomes

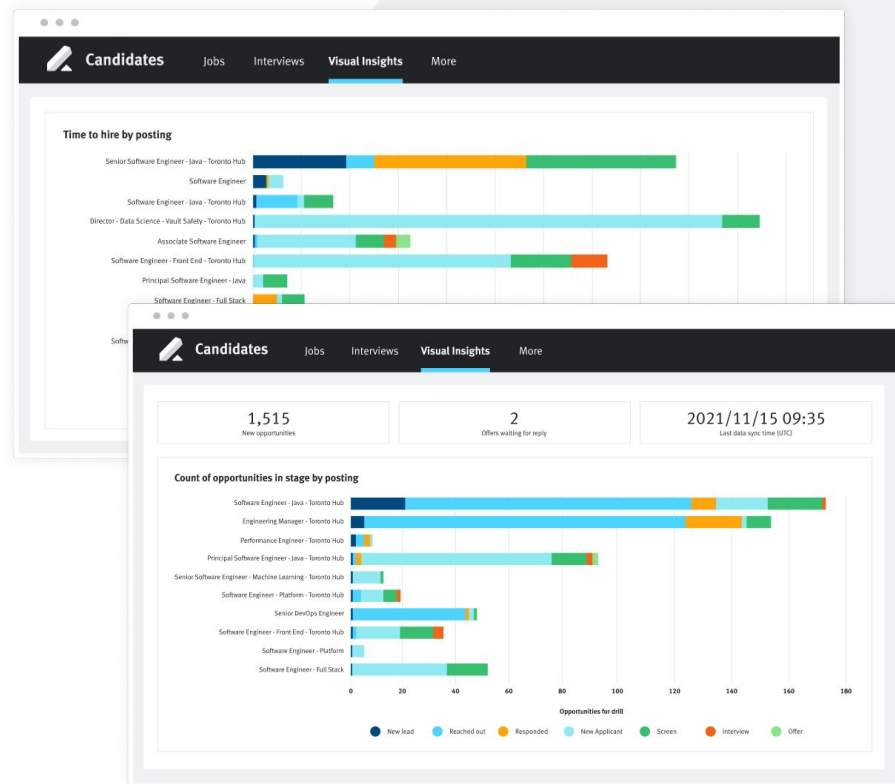
- Proactive
- Granularity
- Accountability



## Visual Insights

We've done the data work so you can move faster and hire smarter.

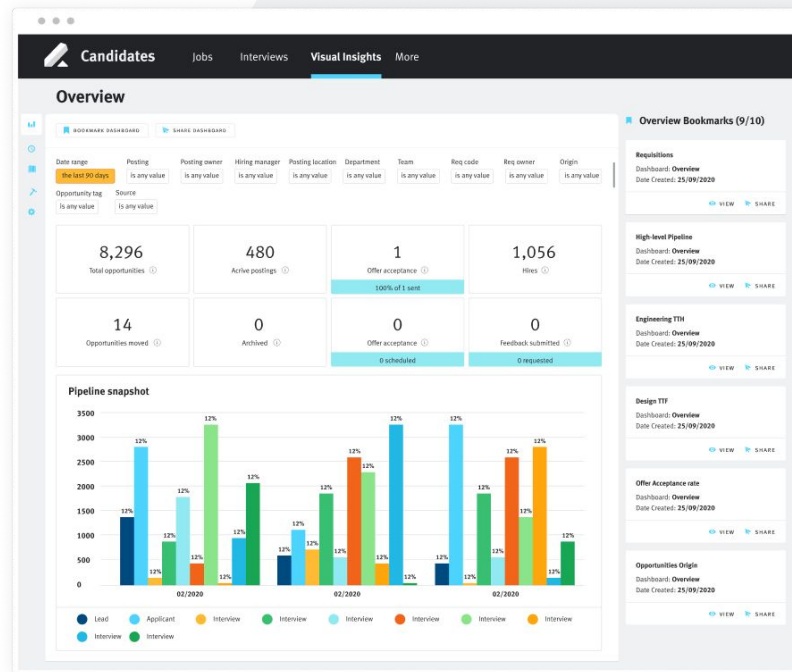
- Visual Insights is a series of curated dashboards native in Lever.
- Our dashboards were built from customer insights and industry best practices.



## Visual Insights

# The three pillars that empower data-driven recruiting:

- Move faster and hire smarter
- Data for everyone
- Uncover insights at the speed of your business



1

**Choose from  
the library of  
dashboards**

Recruiter Operations

Hiring Manager

Overview

Requisitions

Pipeline

Postings

Sources

Offers

Interviews

Nurture

Compliance





EEO

Diversity

Talent Acquisition Benchmarks

# 2

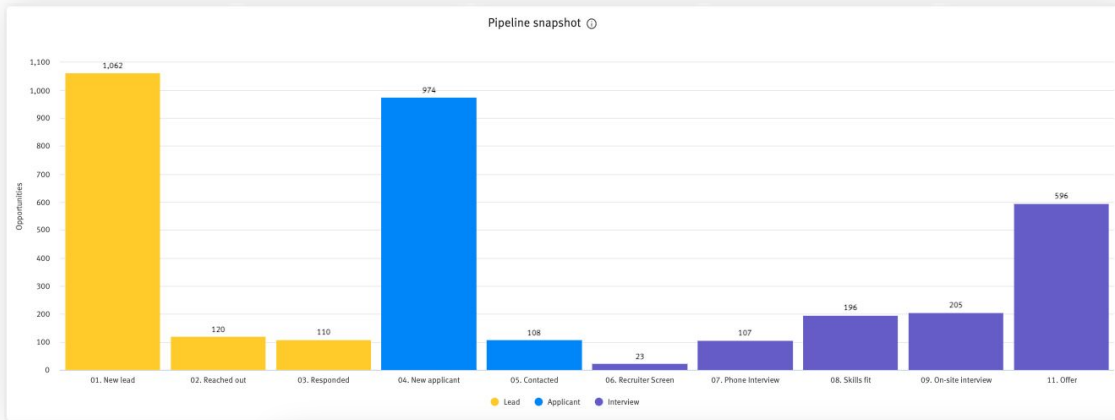
## Filter to uncover insights

Overview 6m ago    

Date range	Posting	Posting owner	Hiring manager	Posting location	Department	Team	Requisition code	Requisition	Requisition owner
is in the last 120 days	is any value	is any value	is any value	is "Bay Area, CA"	is any value	is any value	is any value	is any value	is any value
Origin	Source	Opportunity tag							
is any value	is any value	is any value							

3

Visualize your data and drill into details




Pipeline snapshot

OPPORTUNITY PROGRESS EVENTS DASH (19 Filters)

	Contact name	Current stage	Is opportunity archived	Archive reason	Organization summary	Opportunity owner name	Origin	Sources	Posting title	Department	Team	Location
1	Alonzo Emata	New applicant	No		Taphandies		Applied	Job site	Product Designer, Tools	Product	Design	Bay Area, CA
2	Candace Shiree	New applicant	No		Analytical Flavor Systems	Phyllis Vance	Internal	Job site	Customer Success Manager	Business Development	Customer Success	Bay Area, CA
3	Cathlyn Angelica Rosario	New applicant	No		Alhart Australian Enterprises	Winnie Nguyen	Applied	Job site	Customer Test Success	Client Services	Customer support	Bay Area, CA
4	Christian Villarey	New applicant	No		HENDRIX		Applied	Job site	Product Designer, Tools	Product	Design	Bay Area, CA
5	Dennis Pacardo	New applicant	No		None	Conrad Yu	Applied	Job site	Assistant Regional Manager	Sales	Account Executive	Bay Area, CA
6	Earl Esteven Santos	New applicant	No		Makati City	Leslie Knope	Applied	Job site	Office Manager	People (HR)	not-op	Bay Area, CA
7	Edgar Decena	New applicant	No		Freelance	Leslie Knope	Applied	Job site	Office Manager	People (HR)	not-op	Bay Area, CA
8	Erica Antonio L. Martinez	New applicant	No		Mountain Peak International Human Resources Corp.	Leslie Knope	Applied	Job site	Office Manager	People (HR)	not-op	Bay Area, CA
9	Frizian Dylane	New applicant	No		Struber (Zigzag Connect)	Leslie Knope	Applied	Job site	Office Manager	People (HR)	not-op	Bay Area, CA
10	Gerald Garate	New applicant	No		Nova Media Ortega	Jonathan Whitford	Applied	Job site	Design Director	Indirect	Marketing & Communications	Bay Area, CA
11	Giovanni L. DiBlasi	New applicant	No		None	Max Eady	Applied	Job site	Software Engineer	Engineering	Data Science	Bay Area, CA
12	Guiller Milaor	New applicant	No		Taguig City	Leslie Knope	Applied	Job site	Office Manager	People (HR)	not-op	Bay Area, CA
13	Ian Robin Tapel	New applicant	No		adish	Winnie Nguyen	Applied	Job site	Customer Test	Client Services	Customer support	Bay Area, CA

4

## Bookmark and share your dashboard

 **BOOKMARK DASHBOARD**

**Overview Bookmarks (4)**

**Q1 Hiring**  
Dashboard: **Current Operations**  
Date Created: **05/06/2021**

[VIEW](#)

**HR Test**  
Dashboard: **Current Operations**  
Date Created: **02/01/2022**


[VIEW](#)

**Bay Area Hiring**  
Dashboard: **Current Operations**  
Date Created: **03/29/2022**

[VIEW](#)

**Overview 1**  
Dashboard: **Current Operations**  
Date Created: **04/04/2022**

[VIEW](#)

 **SHARE DASHBOARD**

**SHARE REPORT** > **DELIVERY DETAILS** > **REVIEW & SEND**

### Share report

Do you want to make sharing this report a recurring event?

Recurring delivery

**Recurrence settings**

Weekly

Send on

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

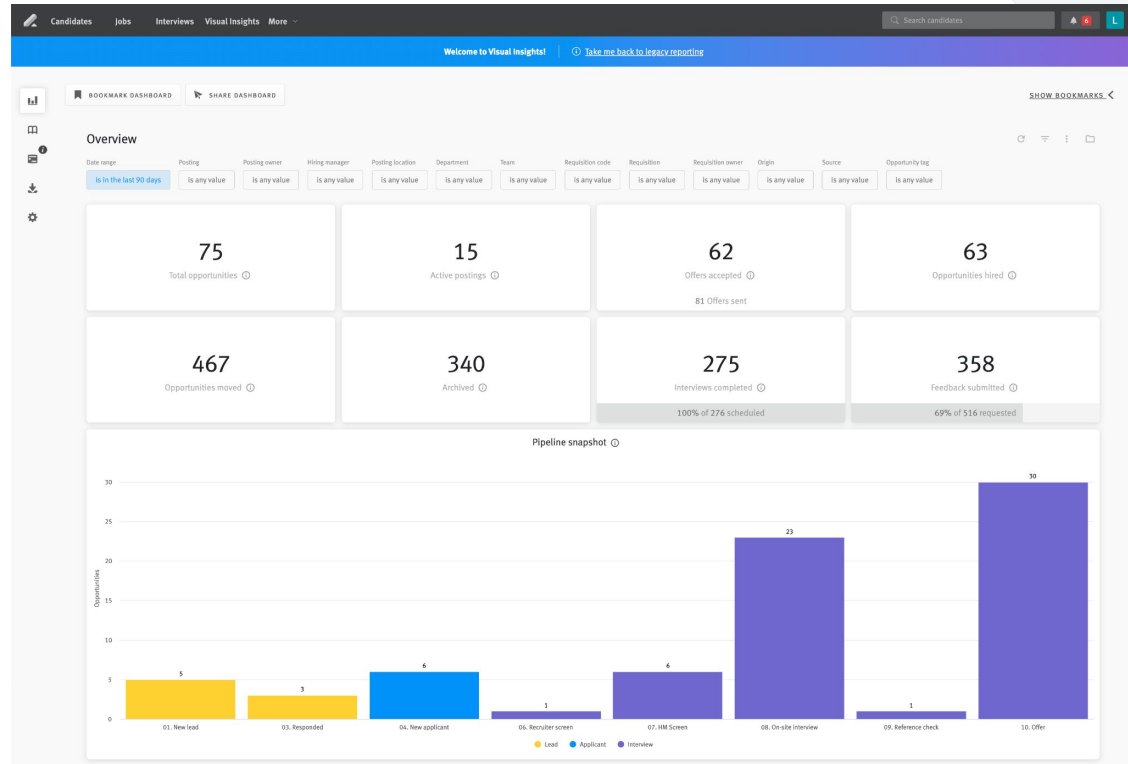
Time to send

9:00 AM PST (GMT-07:00)

One-time delivery

# Visual Insights Dashboards for LeverTRM

Recruiter Operations  
Hiring Manager  
Overview  
Pipeline  
Postings  
Sources  
Offers  
Interviews  
Nurture  
Compliance  
EEO  
Diversity  
Talent Acquisition Benchmarks



# Visual Insights in LeverTRM by Role



Role	Dashboards	
<p><b>Talent Leader &amp; Talent Ops</b> (Super Admin &amp; Admin)</p>	<ul style="list-style-type: none"> <li>• Offers</li> <li>• EEO (all)</li> <li>• Diversity (all)</li> <li>• Overview</li> <li>• Pipeline</li> </ul>	<ul style="list-style-type: none"> <li>• Postings</li> <li>• Interviews</li> <li>• Compliance</li> <li>• Sources</li> <li>• Talent Acquisition Benchmarks</li> </ul>
<p><b>Recruiter</b> (Team Member)</p>	<ul style="list-style-type: none"> <li>• Recruiter Operations</li> <li>• Nurture</li> </ul>	<ul style="list-style-type: none"> <li>• Interviews</li> </ul>
<p><b>Hiring Manager</b> (Limited Team Member)</p>	<ul style="list-style-type: none"> <li>• Hiring Manager</li> </ul>	



# Three ways Visual Insights can elevate your TA strategy:

1

You can transition from a reactive talent acquisition strategy to a proactive one

2

You can uncover more granular insights related to your core recruiting activities

3

You can ensure there's more accountability for each member of your talent org

# Here's what you'll see in the Visual Insights demo:

- Overview
- Requisitions
- Pipeline
- Postings
- Sources
- Offers
- Interviews
- Recruiter operations: Team view
- Diversity
- Talent Benchmarks



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**Live Demo!**



**Poll: Which dashboard resonated  
the most with you?**

## Visual Insights

# Coming soon in this Summer Release:

- Visual Insights is **available to ALL Lever customers at no extra cost.**
- After the release, **you will still be able to transition back to our Legacy Reporting.**
- Keep an eye out for **emails containing a guide on Visual Insights and additional help content.**



# Assets that help

## Improving Your Talent Team's Performance with Visual Insights

## Visual Insights Data & Analytics Guide

Starting Each Day with the Data You Need to Succeed

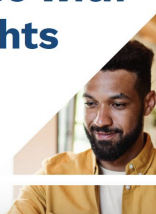


VISUAL INSIGHTS GUIDE

amid the pandemic, our 2020 State of Recruitment — notably,

and evaluating recruitment is particularly to the side a straightforward, cutting activities.

## Improving Your Talent Team's Performance with Visual Insights

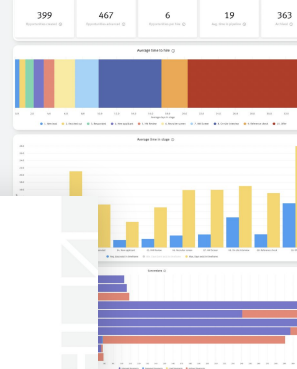


### Pipeline Dashboard

Better understand your recruiters' efforts to move candidates through your funnel.

Some questions this dashboard helps answer and insights it provides include:

- How long do opportunities spend in the pipeline?
- How many opportunities are needed to make a single hire?
- What pipeline stage are all opportunities in?
- What is the average time to hire?
- How many days do opportunities spend in each stage? Where are the bottlenecks?
- How many opportunities have been created



## Visual Insights

Data & Analytics Guide





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## Upcoming Webinars in the Visual Insights Knowledge Series

- July 26, 2022 at 10am PT / 1pm ET: Understanding Visual Insights for Recruiters and Hiring Managers
- August 16, 2022 at 10am PT / 1pm ET: Leveraging Benchmark and DEI Data to Build Recruitment Strategies
- August 23, 2022 at 10am PT / 1pm ET: Introduction to Advanced Analytics and Data Explorer



**Thank You!**

