GUIDE

UNIFY PEOPLE DATA AND WORK DATA FOR POWERFUL INSIGHTS

A how-to guide for HR tech leaders

HR tech leaders play an essential role in managing data and ensuring compliance, however, they're often not fully leveraged for the strategic value they can bring.

While they own HR data, they often lack visibility into work data (such as tickets, deals, tasks, or output). These limitations and consequent siloed systems make it hard to answer urgent business questions about capacity, productivity, and burnout. To make matters worse, HR requests for access to work data often take a backseat, as IT teams juggle competing priorities across the organization and data stewards are hesitant to share their data.

The best HR tech leaders have mastered traditional HR metrics, but these are no longer enough. For example, most HR tech teams understand basic reporting (headcount, turnover, engagement) while operational questions, like where time's going or what's driving burnout, go unanswered. As a result, unifying people and work data is becoming increasingly critical to support more strategic, outcome-focused decisions.

This is where performance lives. It's not just in your HR data, but in the way people and work data connect to reveal what workforce factors drive—or hinder—business outcomes.

This is the next big hurdle for HR tech leaders: How will you integrate people data and work data to get far richer insights and information so your organization can make better, informed decisions?

This shift requires a new mindset, as teams that haven't traditionally collaborated will now need to work together, often encountering barriers along the way.

This guide serves as a playbook for Technical PAs, HRIS/HRIT, and HR Ops leaders to unlock a rich opportunity to become strategic partners in empowering the business

We'll show you how to:

- Reduce silos and integrate people data and business data
- Identify high-impact use cases
- Get stakeholder buy-in and alignment
- Run a high-impact 90-day pilot
- Avoid common pitfalls

What do we mean by "unifying people and work data"?

A unified view of people data and work data isn't about creating a people surveillance system. It's about strategy. It's a shift toward making smarter, outcome-driven decisions powered by a deeper understanding of how people contribute to the business.

- People data (roles, tenure, engagement) defines who the workforce is.
- Work data (tickets, tasks, deals) defines what they're doing.

By securely linking people and work data at scale, HR tech leaders can help organizations gain new insights with actionable intelligence to address challenges and optimize performance.

Here's what this could look like for your organization:

HR understands people data

(e.g. tenure, turnover, engagement and demographics)

+

Sales understands pipeline data

(e.g. opportunity size, time to close, win rates)

=

Understand the impact of people on sales success

(e.g. revenue per employee, admin time vs. selling time, burnout risk by role or tenure)

Support understands ticket data

(e.g. opportunity size, time to close, win rates)

=

Understand the impact of people on support resolution

(e.g. workload vs. engagement, overtime hours vs. attrition risk, resolution quality by experience level)

Manufacturing understands operational data

(e.g. output volume, downtime, scrap rates, scheduling)

=

Understand the impact of people on manufacturing operations

(e.g. productivity per shift by tenure, impact of absenteeism on scrap, optimal staffing patterns based on turnover trends)

This level of clarity empowers HR tech leaders to move beyond support and take a leading role in proactively optimizing processes, driving strategic initiatives, and delivering measurable business impact.

The urgency to break data silos

In an era of AI disruption and economic headwinds, HR tech leaders feel the pressure to provide answers to questions that go beyond traditional HR boundaries. But data silos are creating barriers when, in fact, there's never been a more important time to break them down.

More organizations are turning to platforms like Visier to bring together all of the systems, data sources, and tools they're using quickly and securely. This is what eliminates barriers and distance between people and work data, creating a single source of truth and a unified view.

> People costs can represent up to 60–70% of most operating costs. Now, HR is a business function that's expected to driveproductivity, agility, and resilience.

HR tech leaders are in the perfect position to support this transformation. By eliminating data silos, you help HR to become an agent of strategy instead of a support function.

But where do you start?

Key questions to answer

- How can we better achieve revenue targets faster?
- What's slowing down our project delivery?
- How can we optimize my team for better results?
- How can we better navigate uncertain times?

Your pilot framework from integration to impact

Launching a high-impact pilot to bring people and work data together requires a structured, tech-focused approach from IT and HR tech leaders. If you focus on a single business problem that's measurable, you can show this value in as little as 90 days.

The following framework includes three phases that will help you plan, launch, and scale a pilot to show the power of unifying data.

Phase 1: Plan and align (WEEKS 0 – 4)
Identify and agree on a high-impact use case

Phase 2: Define and connect (WEEKS 4 – 8)
Outline key joins, metrics, groupings then integrate

Phase 3: Share and measure (WEEKS 8 – 12)
Deliver insights, track usage, and scale

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Weeks 0–4

Phase 1: Plan and align

Start by choosing a focused, high-impact starting use case. Talk to business leaders across the organization to understand where the most pressing challenges lie. You may already have ideas or existing relationships to guide you. This will show you the quickest opportunities you have to drive immediate impact through data unification and prove value quickly.

Here's a checklist to guide you in choosing a pilot use case that sets you up for success:

- [ ] **Business-relevant and visible**
Why it matters: Tied to revenue, cost, customer experience, or risk
Example: Reduce ticket backlog during product launches

- [ ] **Data-available**
Why it matters: Requires data that is already logged and tracked
Example: Workday and Jira

- [ ] **Cross-functional**
Why it matters: Builds alignment across at least two teams
Example: PA/HRIT and Sales

- [ ] **Measurable in 90 days**
Why it matters: Delivers quick, quantifiable wins
Example: Cycle time, Revenue per full-time equivalent (FTE), Customer Satisfaction Score (CSAT)

Example use cases

If you're not sure where to start, use the pilot use cases below that map to the checklist criteria. These five examples cover important areas of business operations and demonstrate measurable results using common data sets your organization likely already has.

Use this template to align stakeholders around an MVP that demonstrates value fast.

SECTION	EXAMPLE
Problem	Sales performance is slowing down
Goal	Understand how sales rep time is spent
Systems	Workday, Salesforce, Outlook
Metrics	Revenue/FTE, % time in meetings
Stakeholders	Sales Ops, IT, HRBP, RevOps

AREA	PROBLEM	GOAL	EXAMPLE METRICS	EXAMPLE DATA SOURCES
Sales	Sales performance is slowing down	Understand how much time is lost to non-selling tasks and where to reduce friction	• Win Rate per Hour Spent Selling • Selling Time % (Meeting + CRM time vs. Total Hours Worked) • Sales per Admin Hour (Output vs. Admin Workload)	
Support	Customer response times are lagging	Identify workload bottlenecks and staffing gaps to prioritize improvements	• Tickets Resolved per Agent Hour • Overtime Hours vs. SLA Breaches • Escalation Rate per Agent Tenure (experience vs. quality)	
Engineering	Product delivery is slipping	Highlight overloaded devs and inefficient sprint planning	• Context-Switch Rate vs. Code Quality or Defect Rate • Delivery Velocity vs. Team Stability (turnover + churn) • Time on Priority Tickets vs. PTO / Absence Rates	
Manufacturing	Production inefficiencies and higher waste are emerging	Link staffing patterns to output quality and waste to optimize scheduling	• Absenteeism Rate vs. Downtime Minutes • Overtime Hours vs. Scrap Rate • Productivity per Shift vs. Staffing Level Deviation	PRODUCTION LOGS
Onboarding	Ramp time is long and early attrition is rising	Identify drop-off points and weak manager engagement	• Time to Full Productivity vs. Training Completion Time • Early Attrition Rate vs. Onboarding Task Completion % • Manager Engagement Score vs. Ramp Time Variance	HRIS LMS

Phase 1: Plan and align (WEEKS 0 – 4)	Phase 2: Define and connect (WEEKS 4 – 8)	Phase 3: Share and measure (WEEKS 8 – 12)
Identify and agree on a high-impact use case	Outline key joins, metrics, groupings then integrate	Deliver insights, track usage, and scale

Weeks 4–8

Phase 2: Define and connect

Now that you've identified a strong starting use case and have stakeholder buy-in, it's time to bring the pilot to life by connecting the data and uncovering real insights.

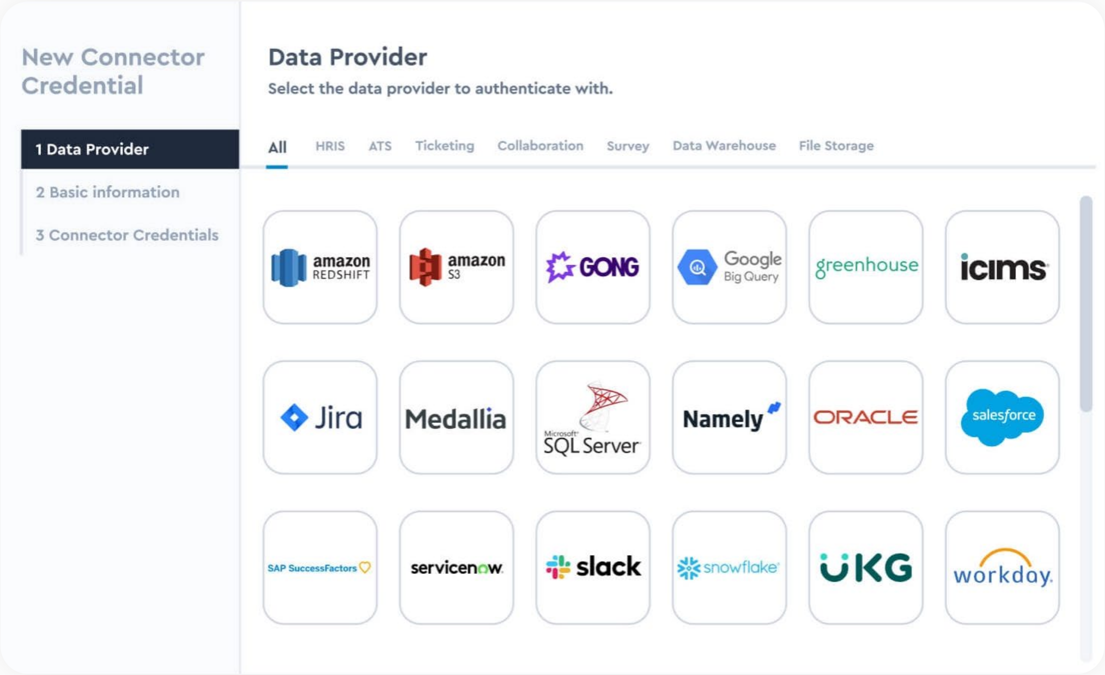
Start by outlining the data model you'll need based on the data you already have and the problem you're trying to solve.

Pre-integration data planning checklist:

- [ ] Identify the key metrics you need to track
- [ ] Define how the data should be grouped
- [ ] Determine any filters needed to focus the analysis
- [ ] Specify the join keys that will link data entities
- [ ] Ensure the model aligns with your use case

Once your model has been defined, you can use Visier or similar platforms to connect various sources of data and configure your schema.

Visier makes it easy to merge people data from systems like Workday (employee records, time tracking) with business data from Salesforce (deal activity, pipeline updates) and Outlook (calendar and email metrics).



Ensure that the combined datasets, along with any newly created metrics and calculations, are accurate, consistent, and reflect a single source of truth. Once integrated and data validated, adding a layer of business intelligence and analytics helps you visualize these combined data sources and provide insights to other stakeholders.

Visier allows you to build rich dashboards and reports within the platform, or connect to external BI tools like Power BI or Tableau to broaden your analytic reach.

At this point, start exploring initial insights. Using the Sales use case as an example, Visier might show that your high-performing reps spend 60% of their time selling, while the rest only spend 40%, as they lose time to too many meetings. Those findings serve as cues for interventions like automating Salesforce workflows or cutting unnecessary meetings.

Before sharing more broadly, make sure privacy controls are in place to protect sensitive information and maintain compliance. Visier's cohort-level aggregation, PII-masking features give you anonymized data to meet GDPR/CCPA, or internal policy requirements.

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Weeks 8–12

Phase 3: Share and measure

Now that you've connected and analyzed your data, it's time to turn insights into action and prove the value of your pilot. This final phase focuses on sharing results, driving decisions, and measuring real business outcomes.

Step 1: Create a distribution plan

Make sure these valuable insights aren't just buried in dashboards. Define a lightweight distribution plan to ensure visibility and impact with the right stakeholders. Be sure to define:

- Who sends the insights (e.g. People Analytics, HRIT, Sales Ops)
- When they're delivered (e.g. weekly, monthly, or live dashboard)
- What tools stakeholders use (e.g. Slack, teams, emails)
- What actions the stakeholder should take (e.g. reduce non-essential meetings to protect selling time)
- How to log success (e.g. click-throughs, views)

To drive prompt awareness, consider using Slack cards pushed into specific channels to share highlights in real time.

Regularly measuring success KPIs helps you tell if your pilot worked or needs to be refined. With tools like Visier, you can use automated reporting to monitor your metrics on a weekly basis and look for trends like decreased admin time leading to higher deal closes.

Step 2: Monitor adoption and improve

Feedback is just as important in this process, so you can tell if the pilot meets stakeholder requirements. Run bi-weekly check-in sessions with Sales and HRIT leadership to get feedback on dashboard usability and insights relevance.

Alongside this, track how stakeholders interact with insights. Review engagement monthly and look for signs of adoption like:

- Dashboard views
- Actions taken based on insights
- Frequency of updates or feedback

This cycle of iterative feedback creates an opportunity for real-time adjustments to ensure the pilot can demonstrate the measurable impact the business stakeholders expect while continuing to support the company's business strategy.

Step 3: Prove business impact

Once adoption is in motion, begin tying insights to measurable outcomes. This is where your pilot proves its value. Track KPIs across three dimensions:

LAYER	SALES USE CASE EXAMPLE METRICS
Workforce health	Burnout indicators, voluntary attrition
Adoption and use	Dashboard views by sales leadership, insights acted upon
Business impact	Revenue/FTE, win rate per hour spent selling, quota attainment

These metrics turn your pilot from an exploratory effort into a strategic project, backed by data and aligned with business performance.

Step 4: Share wins and scale what works

Share your success stories with other stakeholders to create momentum and win buy-in. Package your wins into concise success updates like, "Increased selling time by six hours per rep each week by cutting low-value internal meetings, leading to a 12% increase in quota attainment within 60 days."

As a baseline, you want to double down on the initiatives that work by focusing on the high-impact metrics or use cases. In the meantime, you'll be refining or retiring low-value items like reports that get zero downloads to prioritize the efforts you need to focus on.

Avoiding common pitfalls

By having backup plans for common challenges and using actionable strategies, HR tech leaders can de-risk their program and make it a success. Here's how to avoid four major traps.

MISTAKE	HOW TO AVOID
Trying to do too much	Focus on one high-impact use case (e.g. improving sales performance). For instance, you could integrate just two systems (e.g. Workday and Salesforce) via your tool's prebuilt connectors, ensuring a manageable scope and fast results.
IT friction	Involve IT early and highlight your tool's strong security features, such as encrypted data flows and role-based access, to change perception and foster trust, easing integration while aligning on a clear governance structure.
Ambiguous KPIs	Use workforce analytics to define specific KPIs (e.g. revenue/FTE, time to resolution for tickets) during your planning process to ensure that stakeholders agree on a success metric from the outset.
Dashboard shelfware	Pair every insight with an action and an owner to accelerate buy-in and impact.

A new era for HR technology

Connecting people data with work data is a game-changer for HR tech leaders, putting them at the center of business strategy. As your role goes beyond people systems and numbers, you're now in a position to elevate HR to a function that drives organizational success.

However, this shift isn't just about new ways of working, it's about building smarter organizations. The Visier platform is here to power that transformation.

A platform built for collaboration

Visier connects HR with the broader business by unifying people and work data to deliver AI-powered analytics and insights that drive business performance. It helps leaders to speak the same language by breaking down silos, aligning on shared goals, and bringing data from tools like Jira and Salesforce with people data, all in one place.

Scalable and built to handle the complexity of people data

People data is constantly shifting, from role changes to org redesigns, new compensation, and more. That data is often scattered across dozens of HR systems. Visier is built to manage this dynamic complexity at scale. Its robust APIs, prebuilt connectors, and automated harmonization bring together data from all your HR systems into a single, secure source of truth without sacrificing performance.

Faster time-to-value, with flexibility

Visier's customizable content and end-to-end infrastructure give HR tech leaders faster time-to-value. Visier brings built-in metrics, dashboards, and workflows right away, without the lengthy development processes. Organizations can use Visier's out-of-the-box capabilities quickly, while still being able to customize them to their specific business needs.

Empower analysts and users while reducing IT overhead

IT burden is reduced thanks to Visier's easy data integration and modeling, so IT teams can focus on other competing priorities. Meanwhile, analysts and users can build and explore independently in a low-code, self-serve analytics environment. This allows them to create their own custom reports, identify trends, and uncover insights without limitations on technical capability.

Security and trust at every step

Visier applies enterprise-grade security and governance across all data sources that come into its platform. Role-based access, encryption, and audit trails ensure compliance with regulations like GDPR and CCPA, giving you confidence that the right data is getting into the right hands.

Ready to explore Visier for yourself?

Start your free trial to see what you can build in your own secure sandbox, or schedule a demo.

About Visier

Visier gives organizations a Workforce AI Edge: A set of AI-powered capabilities that help leaders understand the relationship between people and work, elevate employee productivity, and win by adapting to change faster. The company is the global leader in AI-powered people analytics, workforce planning, and compensation allocation. All Visier technology is underpinned by its Real-time People Data Platform, which uses AI to unlock the business-transforming potential of people data, work data, and the fusion of both.

Founded in 2010 by the pioneers of business intelligence, Visier has over 65,000 customers in 75 countries—including enterprises like BASF, Panasonic, Experian, Amgen, eBay, Ford Motor Company, and more.

To learn more about Visier, visit visier.com.

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