

Excel Dashboard Visualization

Unlocking Your Data's Potential in 2 days

FA-0014 · 2 days

Data & Analytics

Introduction

In today's data-driven world, the ability to create dynamic dashboards and visualizations is crucial for decision-making and communicating insights effectively. This 2-day intensive course is designed for intermediate to advanced Excel users who want to elevate their skills in data visualization and dashboard creation.

Through practical, real-world examples and hands-on exercises, you will learn how to leverage Excel's powerful features to build interactive dashboards that can impress management and drive business success.

Learning outcomes

By the end of this course, participants will:

- Master advanced Excel functions and formulas for dashboard creation.
- Develop interactive and dynamic Excel dashboards.
- Understand the principles of effective data visualization.
- Gain proficiency in using Excel's built-in tools like PivotTables, PivotCharts, and slicers.
- Learn to automate and streamline data processes within Excel.
- Create visually appealing reports that communicate data clearly and effectively.

Prerequisites

- Proficiency in intermediate Excel (e.g., VLOOKUP, SUMIFS, basic PivotTables).

- Access to Microsoft Excel 2010 or later versions.
- A basic understanding of data analysis concepts.

Training outline

1. 1. Introduction to Excel Dashboards

- Overview of Dashboards and Their Importance
- Planning and Structuring Your Dashboard
- Key Elements of a Successful Dashboard

2. 2. Advanced Excel Functions for Dashboards

- Nested IF Statements and Conditional Logic
- Array Formulas for Dynamic Data Ranges
- Leveraging INDEX and MATCH for Flexible Data Retrieval
- Advanced Lookup Techniques (e.g., VLOOKUP vs. INDEX MATCH)

3. 3. Data Preparation and Cleaning

- Importing and Structuring Data Efficiently
- Using Text Functions to Clean and Prepare Data
- Handling Missing Data and Errors
- Sorting and Filtering Large Datasets

4. 4. Creating Interactive Data Visualizations

- Best Practices in Data Visualization
- Creating Dynamic Charts with PivotTables and PivotCharts
- Customizing Charts for Better Insight Communication
- Using Slicers and Timelines for Interactive Filtering
- Introduction to Excel Form Controls for Interactivity

5. 5. Building a Dynamic Dashboard

- Integrating Multiple Data Sources
- Designing Dashboard Layouts for Readability

- Utilizing Named Ranges for Dynamic Content
- Linking Worksheets and Automating Updates
- Creating KPIs and Traffic Light Indicators

6. 6. Enhancing Dashboard Functionality

- Implementing Drop-Down Menus and Form Controls
- Creating Dynamic Text and Chart Titles
- Using Excel's Camera Tool for Dashboard Elements
- Automating Dashboards with VBA (optional overview)

7. 7. Advanced Formatting Techniques

- Conditional Formatting for Dynamic Visual Cues
- Custom Number Formats for Financial Data
- Using Themes and Templates to Standardize Reports
- Incorporating Company Branding and Style Guides

This course provides a fast track to mastering Excel dashboards and data visualization, equipping you with skills that are highly valued in today's data-centric business environment. Join us to turn raw data into powerful insights!