Training Course on Microsoft Excel for Dashboard Design and Reporting

Professional Development Training Course Outline

Category	Business	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today's data-driven landscape, the ability to transform raw data into actionable insights is paramount. This **Microsoft Excel Dashboard Design and Reporting** training empowers participants to master the art of creating dynamic and visually compelling dashboards. Leveraging powerful Excel features like **PivotTables**, **Power Query**, and advanced charting techniques, this course focuses on practical application, enabling users to efficiently extract, analyze, and present critical business information. This program addresses the growing demand for professionals skilled in **data visualization** and **business intelligence**, ensuring participants can deliver impactful reports and facilitate informed decision-making.

This comprehensive training goes beyond basic Excel functionalities, diving deep into advanced techniques for **data modeling**, **interactive dashboard creation**, and **automated reporting**. Participants will learn to design dashboards that are not only aesthetically pleasing but also highly functional, allowing for real-time data analysis and performance monitoring. By focusing on real-world scenarios and hands-on exercises, this course equips individuals with the skills to streamline reporting processes and enhance organizational efficiency. The emphasis on **Excel analytics** and **report automation** ensures that graduates can immediately apply their knowledge to solve complex business challenges.

The course's curriculum is meticulously crafted to cater to diverse learning styles, integrating theoretical knowledge with practical application. By mastering **Excel data analysis** and dashboard design, participants gain a competitive edge in their respective fields. This training underscores the importance of **data-driven decision making**, providing the tools necessary to communicate complex data effectively and drive strategic initiatives. Participants will leave with a portfolio of dashboard projects, showcasing their proficiency in using Microsoft Excel as a robust tool for insightful reporting and impactful presentations.

Programme Curriculum

Training Course on Microsoft Excel for Dashboard Design and Reporting

Introduction

In today's data-driven landscape, the ability to transform raw data into actionable insights is paramount. This **Microsoft Excel Dashboard Design and Reporting** training empowers participants to master the art of creating dynamic and visually compelling dashboards. Leveraging powerful Excel features like **PivotTables**, **Power Query**, and advanced charting techniques, this course focuses on practical application, enabling users to efficiently extract, analyze, and present critical business information. This program addresses the growing demand for professionals skilled in **data visualization** and **business intelligence**, ensuring participants can deliver impactful reports and facilitate informed decision-making.

This comprehensive training goes beyond basic Excel functionalities, diving deep into advanced techniques for **data modeling**, **interactive dashboard creation**, and **automated reporting**. Participants will learn to design dashboards that are not only aesthetically pleasing but also highly functional, allowing for real-time data analysis and performance monitoring. By focusing on real-world scenarios and hands-on exercises, this course equips individuals with the skills to streamline reporting processes and enhance organizational efficiency. The emphasis on **Excel analytics** and **report automation** ensures that graduates can immediately apply their knowledge to solve complex business challenges.

The course's curriculum is meticulously crafted to cater to diverse learning styles, integrating theoretical knowledge with practical application. By mastering **Excel data analysis** and dashboard design, participants gain a competitive edge in their respective fields. This training underscores the importance of **data-driven decision making**, providing the tools necessary to communicate complex data effectively and drive strategic initiatives. Participants will leave with a portfolio of dashboard projects, showcasing their proficiency in using Microsoft Excel as a robust tool for insightful reporting and impactful presentations.

Course Duration

10 days

Course Objectives

1. Master the fundamentals of **Excel data manipulation** and preparation.
2. Utilize **PivotTables and PivotCharts** for interactive data analysis.
3. Implement **Power Query** for efficient data extraction and transformation.
4. Design visually appealing and informative **Excel dashboards**.
5. Create **dynamic reports** using advanced Excel functions.
6. Automate reporting processes with **Excel VBA** and Macros (optional).
7. Apply **conditional formatting** and data validation for enhanced clarity.
8. Develop interactive dashboards with **form controls** and slicers.
9. Integrate external data sources into Excel for comprehensive reporting.
10. Implement **data visualization best practices** for effective communication.
11. Design dashboards for **key performance indicators (KPIs)** and metrics.
12. Generate **automated Excel reports** for regular business updates.
13. Troubleshoot and optimize **Excel dashboard performance**.

Organizational Benefits

- Improved **data-driven decision making**.
- Enhanced reporting efficiency and accuracy.
- Streamlined data analysis processes.
- Increased productivity through automated reporting.
- Better communication of business insights through compelling dashboards.

Target Participants

1. Business Analysts
2. Financial Analysts
3. Data Analysts
4. Project Managers
5. Marketing Professionals
6. Sales Managers
7. Operations Managers
8. Administrative Professionals

Course Outline

1. **Introduction to Excel for Data Analysis:**

   - Understanding Excel interface and basic functions.
   - Data entry and formatting best practices.
   - Introduction to data types and structures.
   - Basic formulas and functions for data manipulation.
   - Navigating large datasets efficiently.

- **Data Preparation and Cleaning:**

  - Importing data from various sources.
  - Cleaning and transforming data with Text functions.
  - Removing duplicates and handling missing values.
  - Data validation and error handling.
  - Using Flash Fill and Text to Columns.

- **Advanced Excel Functions:**

  - Lookup functions (VLOOKUP, INDEX, MATCH).
  - Logical functions (IF, AND, OR).
  - Date and time functions.
  - Statistical functions for data analysis.
  - Array formulas.

- **PivotTables and PivotCharts:**

  - Creating and customizing PivotTables.
  - Summarizing and analyzing data with PivotTables.
  - Creating interactive PivotCharts.
  - Using slicers and timelines for dynamic filtering.
  - Grouping and calculated fields.

- **Power Query for Data Transformation:**

  - Importing data from multiple sources with Power Query.

    - Cleaning and transforming data with Power Query Editor.
    - Appending and merging queries.
    - Automating data transformation steps.
    - Loading data into the Data Model.
- **Data Modeling and Relationships:**
    - Understanding data models.
    - Creating relationships between tables.
    - Using calculated columns and measures.
    - Using the data model to create pivot tables.
    - Best practices for data modeling.
- **Dashboard Design Principles:**
    - Understanding dashboard design best practices.
    - Choosing appropriate chart types for data visualization.
    - Designing effective layouts and color schemes.
    - Creating clear and concise titles and labels.
    - Ensuring readability and usability.
- **Creating Interactive Dashboards:**
    - Using form controls (buttons, checkboxes, dropdowns).
    - Implementing slicers and timelines for interactive filtering.
    - Creating dynamic charts and tables.
    - Linking dashboard elements for seamless interaction.
    - Using the camera tool.
- **Advanced Charting Techniques:**
    - Creating custom chart types.
    - Using combo charts for complex data visualization.
    - Applying conditional formatting to charts.
    - Adding trendlines and forecasting.
    - Creating dynamic chart titles.
- **Conditional Formatting and Data Validation:**
    - Applying conditional formatting rules.
    - Using data validation for data integrity.
    - Creating custom data validation rules.
    - Highlighting key data points.
    - Using Icons and data bars.
- **KPI Dashboards and Performance Metrics:**
    - Identifying and defining key performance indicators (KPIs).
    - Designing dashboards for monitoring KPIs.
    - Creating visual representations of performance metrics.
    - Implementing alerts and notifications.
    - Creating scorecards.
- **Automating Reports with Excel VBA (Optional):**

- Introduction to VBA programming in Excel.
- Recording and editing macros.
- Creating custom functions and procedures.
- Automating repetitive tasks.
- Looping and conditional VBA statements.

- **Integrating External Data Sources:**
  - Connecting to databases (SQL, Access).
  - Importing data from web sources.
  - Using Power Query to connect to files and folders.
  - Using Get & Transform data.
  - Using web queries.

- **Advanced Dashboard Techniques and Optimization:**
  - Optimizing dashboard performance.
  - Troubleshooting common dashboard issues.
  - Using advanced formulas for complex calculations.
  - Creating dynamic named ranges.
  - Using sparklines.

- **Case Studies and Project Work:**
  - Analyzing real-world dashboard examples.
  - Developing custom dashboards for specific business scenarios.
  - Presenting and critiquing dashboard designs.
  - Applying learned techniques to solve business problems.
  - Building a portfolio of dashboard projects.

Training Methodology

- Interactive lectures and discussions.
- Hands-on exercises and practical examples.
- Case studies and real-world scenarios.
- Individual and group projects.
- Q&A sessions and troubleshooting.
- Step by step video tutorials.
- Providing template files.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com