MERCURY

Data Analysis and Dashboard Reporting in Excel

25 – 29 October 2027
Washington DC (USA)



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Ref: 121321_1081616 **Date:** 25 – 29 October 2027 **Location:** Washington DC (USA) **Fees:** 8300 Euro

Introduction

Data Analysis and Dashboard Reporting in Excel equips professionals with essential skills to transform raw data into actionable insights. This course focuses on mastering Excel tools for analyzing trends, visualizing information, and generating dynamic dashboards. Participants will learn to apply formulas, pivot tables, and charts effectively for decision-making. The program emphasizes practical applications for business reporting and performance tracking. By the end, learners will confidently interpret data and present findings clearly. This course is for professionals aiming to enhance efficiency and data-driven decision-making.

Targeted Groups

This Data Analysis and Dashboard Reporting in Excel targets professionals seeking specialized knowledge and skills:

- Business analysts are looking to improve reporting efficiency.
- Finance professionals managing large datasets.
- Marketing specialists are analyzing campaign performance.
- Managers require interactive dashboards for decision-making.
- IT staff supporting business intelligence projects.
- Project managers tracking progress with data insights.
- Students and graduates aiming to enhance Excel data skills.

Course Objectives

Participants will achieve the following objectives by completing the Data Analysis and Dashboard Reporting in Excel course:

- Analyze datasets using advanced Excel functions.
- Build interactive dashboards for business reporting.
- Apply pivot tables and charts to visualize trends.
- Utilize conditional formatting for data interpretation.
- Automate data summaries using formulas and macros.
- Enhance decision-making through data-driven insights.
- Present findings effectively to stakeholders.
- Improve efficiency in handling large datasets.
- Strengthen skills in Excel for professional use.
- Interpret complex data quickly and accurately.

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Targeted Competencies

Participants will gain the following competencies during the program:

- Proficient use of Excel for data analysis.
- Ability to create dynamic dashboards.
- Skill in summarizing and visualizing complex datasets.
- Advanced use of pivot tables and pivot charts.
- Automation of repetitive tasks with formulas and macros.
- Enhanced problem-solving based on data insights.
- Competence in reporting to stakeholders clearly.
- Understanding data trends and anomalies.
- Capability to integrate Excel analysis with business strategies.

Studying Scenarios

In this training, participants will develop their skills through the analysis of the following scenarios:

- Sales trend analysis for monthly performance reports.
- Budget variance tracking in finance departments.
- Marketing campaign results dashboard creation.
- Operational KPI monitoring for project management.
- Customer feedback and satisfaction data evaluation.
- Automated reporting for management meetings.
- Forecasting trends using historical data sets.

Course Content

Unit 1: Introduction to Excel Data Analysis

- Overview of Excel interface and functions.
- Importing and cleaning datasets.
- Basic data manipulation techniques.
- Using formulas for calculations.
- Conditional formatting basics.
- Introduction to charts and graphs.
- Overview of pivot tables.

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Unit 2: Advanced Excel Functions

- Logical functions: IF, AND, OR.
- Lookup functions: VLOOKUP, HLOOKUP, XLOOKUP.
- Text and date functions for reporting.
- Using nested formulas for complex calculations.
- Data validation techniques.
- Error handling in formulas.
- Automating repetitive tasks with macros.

Unit 3: Pivot Tables and Data Summarization

- Creating pivot tables for large datasets.
- Grouping and filtering data efficiently.
- Using pivot charts for visualization.
- Summarizing data with calculated fields.
- Slicers and timeline filters.
- Advanced pivot table formatting.
- Connecting multiple data sources.

Unit 4: Dashboard Design and Reporting

- Principles of dashboard design.
- Selecting appropriate charts for data presentation.
- Creating interactive dashboards with slicers.
- Conditional formatting for visual impact.
- Using sparklines for trends.
- Linking multiple sheets for dashboard updates.
- Designing dashboards for management reporting.

Unit 5: Data Analysis for Decision-Making

- Analyzing business KPIs and trends.
- Forecasting future performance with Excel tools.
- Identifying anomalies and outliers.
- Generating automated reports.
- Presenting data insights to stakeholders.
- Best practices for reporting accuracy.
- Integrating analysis with business strategy.

Final Insights & Key Takeaways

Participants will gain confidence in transforming raw data into clear, actionable insights. They will master Excel tools to create dynamic dashboards that support effective decision-making.