

Create Dashboards in Minutes and Analyze Data in Seconds using Excel

2-day (16-hour) workshop.

■ Day 1 – Foundations and Fast Analysis

Module 1: Introduction to Dashboards and Data Analysis

🕒 Duration: 45 mins

🎯 Learning Outcomes:

- Understand what dashboards are and why they're useful.
- Recognize the importance of visual analytics for decision-making.
- Identify types of dashboards (Operational, Analytical, Strategic).

💡 Session Highlights:

- Discuss real-life dashboard examples from Sales, HR, and Finance.
 - Compare traditional reports vs interactive dashboards.
 - Quick demo: "How a single slicer can change everything."
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Module 2: Getting Your Data Ready

🕒 Duration: 1 hour

🎯 Learning Outcomes:

- Learn how to clean, format, and prepare raw data.
- Import data from multiple sources and structure it for analysis.

💡 Session Highlights:

- Using Power Query for quick cleanup (Remove duplicates, fix errors).
- Demonstration: Turn a messy CSV into a clean Excel table.
- Hands-on: Create a Table and enable "Structured References."

Module 3: Data Analysis Tools in Excel

 Duration: 1.5 hours

 **Learning Outcomes:**

- Apply Excel formulas for insights in seconds.
- Build summary views using PivotTables.
- Use conditional formatting for quick trend spotting.

 **Session Highlights:**

- Functions demo: SUMIFS, COUNTIFS, XLOOKUP.
 - Live example: Analyze monthly sales by region in seconds.
 - PivotTable challenge: Build a summary with dynamic grouping.
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Module 4: Creating Interactive Dashboards

 Duration: 1.5 hours

 **Learning Outcomes:**

- Build dynamic and user-friendly dashboards.
- Connect slicers, timelines, and multiple charts together.

 **Session Highlights:**

- Hands-on: Create an interactive Sales Dashboard.
 - Use KPI indicators, trend arrows, and dynamic text.
 - Best practices for dashboard layout and storytelling.
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Module 5: Enhancing Dashboard Visual Appeal

 Duration: 1 hour

 **Learning Outcomes:**

- Design dashboards with clean visuals and brand alignment.
- Choose appropriate chart types for each scenario.

 **Session Highlights:**

- Chart picker activity: “Which chart tells the story best?”
 - Apply color palettes and themes for consistency.
 - Add icons, shapes, and sparklines for a modern look.
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 **Day 2 – Power Tools, Automation & Real Projects**

Module 6: Power Query and Power Pivot for Advanced Dashboards

 Duration: 1.5 hours

 **Learning Outcomes:**

- Transform, merge, and combine data using Power Query.
- Use Power Pivot for advanced data modeling.

 **Session Highlights:**

- Build relationships between tables (Fact & Dimension).
 - Use DAX for calculated fields like Profit % or Year-to-Date.
 - Combine regional files into one dashboard source.
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Module 7: Creating Dashboards that Update Automatically

 Duration: 1 hour

 **Learning Outcomes:**

- Automate dashboard refresh using queries and named ranges.
- Create user input drop-downs for custom views.

 **Session Highlights:**

- Demo: Refreshing a dashboard in one click.
 - Simple macro to “Refresh All Data.”
 - Hands-on: Build a drop-down to filter department KPIs.
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Module 8: Case Studies – Build Dashboards in Minutes

 Duration: 2 hours

Learning Outcomes:

- Apply all skills to real-world scenarios.
 - Design practical dashboards for business use cases.
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Module 9: Tips for Fast Analysis

 Duration: 45 mins

Learning Outcomes:

- Leverage Excel’s built-in AI tools for quick insights.
- Use Quick Analysis and Recommended Charts.

Session Highlights:

- Instant trend detection using conditional formatting.
 - Explore data with “Analyze Data” (Excel AI tool).
 - “Speed challenge”: Find 3 insights in 2 minutes.
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Module 10: Publishing and Sharing Dashboards

 Duration: 45 mins

Learning Outcomes:

- Protect, share, and publish dashboards professionally.
- Export to PDF, image, or Power BI.

 **Session Highlights:**

- Secure dashboards using cell locking.
 - Share via OneDrive or Teams.
 - Discuss Power BI transition for future-ready dashboards.
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Module 11: Final Project – Present Your Dashboard

 Duration: 1 hour

 **Learning Outcomes:**

- Showcase end-to-end dashboard creation.
- Apply design, analysis, and automation skills in one project.

 **Session Highlights:**

- Participants select their own dataset.
 - Step-by-step guidance to design and present their final dashboard.
 - Peer review and trainer feedback session.
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