THE MARQUEE GROUP

DATA ANALYSIS & COMMUNICATION WITH EXCEL
(Intermediate/Advanced)

SUMMARY:

The Data Analysis and Communication Course provides practical tips and hands-on application to a variety of data management, charting and formatting skills in an Excel environment.

Participants will build a series of charts that complete a sample dashboard that provides summary analysis and detailed displays of the underlying data. A variety of chart types will be explored. Automating titles, creating informative labels and text boxes and learning best practices for dashboard design and construction will also be covered.

The course builds on the Excel tools from Data Manipulation with Excel – Part 1 and 2, including lookup functions, tables and pivot tables.

Timing: This course requires 1 day

Experts in financial modeling training

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LEARNING TOPICS:

Communicate with the optimal chart types and formatting
✓ Determine the optimal chart for presenting types of data
✓ Learn design ideas for simple and elegant charts
  – Colour, position, size and shape
✓ Learn complex chart structures such as bubble charts and multiple chart styles in a single chart
✓ Use slicers and other tools to rapidly create interactive and flexible analysis

Data organization and manipulation best practices
✓ Organize and manage data effectively for chart and table creation
✓ Employ sophisticated automation techniques to manage data
✓ Use pivot tables to build powerful data analysis capabilities and link them to charts
✓ Pivot table formatting techniques to enable their use in reports and dashboards

Powerful formatting and automation techniques
✓ Use formulas to automate titles and labels with special techniques for format control
✓ Use conditional formatting for unique data display and highlighting techniques:
  – Turn tables of figures into automated charts
  – Flexible, rules-based highlighting, ranking and formatting of outputs to draw attention to data points of interest
✓ Eliminate footnotes and excess comments by using text functions to automatically create powerful descriptions in your charts and tables
✓ Chart formatting tips to simplify chart creation and to build elegant and easily maintained visual reports

Learn to analyze and summarize complex data sets to create visually appealing decision making tools