



# Data Analysis & Reporting in Excel

Discover how to "tame" your data and make it work for you! Learn to synthesise and summarise information into a logical framework. Learn principles of best practice in the presenting data graphically.

Following the course, each participant receives 4 weeks of support on questions & issues regarding the material that was covered during the course.

Many of us struggle to make sense of all the data that is available in this information age. With such a deluge of reports and statistics which don't mean anything or can't be made sense of, it's no wonder that data is often misinterpreted or not communicated at all. This course will help you understand how to "tame" your data and make it work for you! Learn how to synthesise information into a logical framework, summarise it into a meaningful format, and then display the summary into easy-to-read tables and graphs. Covering dashboard reporting, balanced scorecards, visual design of charts and tables, we will also discuss the new charting and analysis features of Excel 2007.

## Prerequisites

The course material includes extensive use of Excel and participants will gain the maximum benefit from this course if they are already competent spreadsheets users. It is designed for users who do use (or will use) Excel on a regular basis, and are comfortable with using its tools and functions.

At minimum, it is assumed that participants will know how to:

- Navigate confidently in Excel
- Create and use formulas
- Link between workbooks
- Build a basic chart



## Who should attend this course?

This course is intended for anyone who needs to create reports in order to interpret and present information. It is expected that students should have had some exposure to business or finance principles.

## Course Format

Public courses are run in a computer laboratory and workstations are provided so that participants can work in Excel on practical applications of content covered in the course. Course materials are written with both Excel 2007 and 2003 instructions. Participants can choose which version of Excel they prefer. If participants are more comfortable using their own laptops, they are most welcome to bring their own equipment. PCs are used during this course, so Apple Macintosh users may prefer to bring their own laptops.

Students are encouraged to share their own experiences with the class, and are welcome to bring examples of their own data or reports to discuss during the course.

## Learning Objectives

This course is very hands-on and practical. Each participant will be expected to create their own reports, charts and models utilising the tools and techniques covered during the course.

By the end of the day, participants will:

- Understand the principles of data analysis
- Be aware of different tools available to perform their analysis
- Consider when to use a chart or a table
- Know how to use visual effects to improve their reports and presentations
- Understand the concepts of dashboard reporting and balanced scorecards
- Know how to summarise, present and communicate data clearly and concisely



## **Course Content**

### **Fundamentals of Data Analysis**

- Challenges in Data Analysis
- Data Relationships; One to Many, Many to One
- Mean, Median & Mode
- Common Data Analysis terminology

### **Data Analysis Tools**

- Comparison between Excel & Access
- What's new in Office 2007 / 2010
- Shortcuts for data manipulation in Excel
- Pivot Tables

### **Using Excel as a Data Analysis Tool**

- Essential Excel tools & functions
- Working with text
- Cleaning your data
- Creating a robust formula
- Forecasting

### **Charting in Excel**

- Working with charts in Excel 2007
- Charting on different axis
- Bubble and Waterfall charts
- Charting with dynamic ranges

### **Chart and Table Design**

- Tables vs. Charts/Graphs
- Visual Design; presenting data graphically
- Choosing the correct chart to display your findings
- Charting dos and don'ts



## Dashboard Reporting

- Purpose and benefits of Dashboards
- Common mistakes when building a Dashboard
- Creating a Dashboard in Excel

## Balanced Scorecards

- What is a Balanced Scorecard?
- Benefits and pitfalls of a Balance Scorecard

## Comments from Past Students

*"I will take some excellent tips away with me from today – thank you!"*

*"Course was well balanced with practice and theory. Presenter was very knowledgeable and topics were easy to understand."*

*"The content is packed but presented in a simple, informative and effective way."*

## About your Presenter

**Danielle Stein Fairhurst** is an MBA qualified business professional with over fourteen years' experience as a financial analyst. She is the Principal of Plum Solutions, a Sydney-based consultancy specialising in Financial Modelling & Analysis. With her talent for financial modelling and professional approach, she helps her clients create meaningful financial models in the form of business cases, pricing models and management reports. She has hands-on experience in a number of industry sectors, including telecoms, information systems, manufacturing and financial services and has taught management accounting subjects at Sydney University.

Danielle is regularly engaged as a speaker, course facilitator, financial modelling consultant and analyst. She runs regular training seminars around Australia and globally, and her custom built training courses have been described by attendees as well-presented, neatly structured, informative, practical, and extremely relevant to their everyday needs.