

EXCEL DASHBOARD FOR MANAGEMENT REPORTING

Duration: 12 hrs (2 days)

COURSE OUTLINE

- Excel Dashboard best practice
- Ideas on sourcing the relevant financial and non-financial information
- Understanding your key KPI's and how you can assess whether you are meeting your targets
- Excel tools and functions that are vital for dashboards (create templates using the examples)
 - Pivot Tables
 - Using Pivot Tables as the dashboard
 - Using Pivot Tables to re work data to be used in a dashboard
 - Sparkline's
 - Charting and Graphing
 - Forms and controls (for drop down lists to choose what you are comparing)
 - Conditional Formatting
 - Create dashboard heat maps
 - Highlight top and bottom products/ people etc.
 - Highlight missed budgets and forecasts
 - Key functions for Dashboards including
 - OFFSET
 - VLOOKUP
 - AGGREGATE
- Excel Dashboard Tips and Tricks including
 - Linking cells to a text box
 - Linking cells to chart labels
- Excel Dashboard challenges and solutions
 - comparing time series
 - assessing seasonality in a business
 - mixed metrics and KPI's (e.g. comparing financial information with production details)
 - comparing year on year results
 - showing actuals versus budgets versus forecasts
 - Predicting where you are going to end up at year end