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Excel Dashboard Training - Practical Business Reporting

One-day practical corporate training for experienced Excel users

Course Overview

Excel Dashboard Training is a practical one-day course for experienced Excel users who need to turn business data into clear, useful management reports. The course focuses on applying existing Excel skills to dashboard reporting rather than reteaching core Excel from the beginning.

Delegates work through a formula-driven dashboard, a short PivotTable dashboard exercise and an AI-assisted reporting exercise. The emphasis is on building useful reports, selecting meaningful KPIs and presenting information clearly.

Who Should Attend?

Employees in finance, accounting, HR, payroll, sales, operations, administration, reporting and management who already use Excel confidently and need to create clearer visual reports and dashboards.

Prerequisites

Delegates should already be comfortable with the following Excel skills. These are applied during the course and are not taught from the beginning:

- Excel Tables
- IF
- SUMIF and COUNTIF
- Sorting and filtering
- PivotTables
- Standard Excel charts

A small number of additional dashboard formulas and techniques are introduced during the practical exercises where required.

What Will Delegates Be Able to Do?

- Plan a dashboard around a clear business question and audience.
- Prepare structured Excel data for dashboard reporting.
- Create and present useful KPIs.
- Build a practical formula-driven dashboard.
- Create a simple interactive PivotTable and PivotChart dashboard.



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- Use Conditional Formatting, charts and visual reporting techniques effectively.
- Use an approved AI assistant to support dashboard development and analysis.
- Check and validate both Excel calculations and AI-assisted outputs.

Course Content

1. Understanding Excel Dashboards

- Understand the difference between a dashboard and a standard report.
- Identify the audience, purpose and business question.
- Select useful KPIs and avoid unnecessary information.
- Plan a simple one-page dashboard.
- Separate source data, calculations and presentation.

2. Preparing Data for a Dashboard

- Structure source data correctly for reporting.
- Work with Excel Tables.
- Check data before building the report.
- Prepare data for formulas, charts and PivotTables.
- Organise the workbook so that the dashboard can be updated efficiently.

3. Useful Dashboard Formulas

This is a short practical section. Delegates apply existing formula skills and learn a few additional techniques needed for the dashboard exercise.

- SUMIFS and COUNTIFS.
- IFERROR.
- Percentage and variance calculations.
- Link calculations to dashboard KPIs.
- Apply formulas within a practical reporting scenario.

4. Practical Exercise 1 - Formula-Driven Dashboard

Using a supplied business workbook, delegates build a practical one-page dashboard.

- Create KPI calculations.
- Apply relevant formulas.
- Use Conditional Formatting.
- Create appropriate charts.
- Apply clear labels and number formats.
- Arrange the results into a readable management dashboard.

5. Quick PivotTable Dashboard

This is a focused dashboard exercise, not a full PivotTable course.



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- Create a PivotTable from structured business data.
- Summarise the information required for reporting.
- Create a PivotChart.
- Add a slicer for simple interactive filtering.
- Arrange the output as a small interactive dashboard.

6. Practical Exercise 2 - AI-Assisted Dashboard

Delegates use a second business workbook together with an approved AI assistant such as Microsoft Copilot or ChatGPT, depending on the organisation's available technology.

- Interpret a reporting requirement.
- Identify possible KPIs.
- Suggest or explain formulas.
- Troubleshoot formula or reporting problems.
- Suggest suitable charts and presentation options.
- Analyse and interpret the results.
- Improve the clarity of the dashboard.
- Create a short management interpretation of the reported information.
- Validate AI suggestions and confirm the Excel results before use.

7. Dashboard Design and Final Review

- Keep dashboards simple and readable.
- Use colour and emphasis appropriately.
- Position KPIs and charts logically.
- Remove unnecessary information.
- Check calculations and reporting logic.
- Make the dashboard easy to update.
- Confirm that the final dashboard answers the original business question.

Course Outcome

By the end of the day, delegates will have applied their existing Excel skills to a formula-driven dashboard, completed a short PivotTable dashboard exercise and used AI assistance to support a practical dashboard reporting task.

Training Format

- Recommended duration: One day.
- Delivery: Onsite instructor-led corporate training or live virtual instructor-led training.
- Methodology: See it -> Understand it -> Practise it -> Apply it -> Check it.
- Delegates receive training material and an electronic Certificate of Attendance.
- Corporate training can place additional emphasis on reporting situations relevant to the organisation.



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