



COLLEGE AFRICA GROUP

AI | TRAINING | CONSULTING | SKILLS DEVELOPMENT

Better Processes. Stronger Skills. Smarter AI.

Excel Dashboard Training

Managers get pages of numbers when they need one clear view

One-day practical corporate training for experienced Excel users

Duration: One day | **Level:** Experienced Excel users | **Delivery:** Onsite or virtual

The business problem

Reports are often long tables or crowded sheets that answer no clear question. Management has to dig for the numbers that matter, and each update means rebuilding the report.

Staff have the Excel skills, but not a method for turning data into a dashboard that is useful, readable and easy to update.

You need this course if...

- Monthly reports are long tables nobody reads closely
- KPIs are unclear or change every month
- Dashboards are rebuilt by hand at each update
- Charts look busy but do not answer the business question
- Staff use AI for reports but do not check the results

How this course solves it

A practical one-day course for experienced Excel users who need to turn business data into clear management reports. It applies existing Excel skills to dashboard reporting rather than reteaching core Excel.

Delegates build a formula-driven dashboard, a short PivotTable dashboard and an AI-assisted dashboard, with the emphasis on useful reports, meaningful KPIs and clear presentation.

Who should attend?

- Finance, accounting, HR and payroll
- Sales, operations and administration
- Reporting staff and managers who already use Excel confidently

Prerequisites (applied, not taught from the beginning): Excel Tables, IF, SUMIF and COUNTIF, sorting and filtering, PivotTables and standard charts. A few additional dashboard formulas are introduced during the exercises.

Course content

1. Understanding Excel Dashboards

- A dashboard vs a standard report

- Audience, purpose and business question
- Selecting useful KPIs and avoiding unnecessary information
- Planning a simple one-page dashboard
- Separating source data, calculations and presentation

2. Preparing Data for a Dashboard

- Structuring source data correctly for reporting
- Working with Excel Tables
- Checking data before building the report
- Organising the workbook so the dashboard updates efficiently

3. Useful Dashboard Formulas

A short practical section building on existing formula skills.

- SUMIFS and COUNTIFS
- IFERROR
- Percentage and variance calculations
- Linking calculations to dashboard KPIs

4. Practical Exercise 1 — Formula-Driven Dashboard

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

- KPI calculations and relevant formulas
- Conditional Formatting
- Appropriate charts, clear labels and number formats
- A readable management layout

5. Quick PivotTable Dashboard

A focused dashboard exercise, not a full PivotTable course.

- PivotTable from structured business data
- PivotChart
- Slicer for simple interactive filtering
- Arranging a small interactive dashboard

6. Practical Exercise 2 — AI-Assisted Dashboard

A second workbook with an approved AI assistant such as Microsoft Copilot or ChatGPT, depending on the organisation's technology.

- Interpret a reporting requirement and identify possible KPIs
- Suggest, explain or troubleshoot formulas
- Suggest suitable charts and presentation options
- Analyse results and draft a short management interpretation
- Validate AI suggestions and confirm the Excel results before use

7. Dashboard Design and Final Review

- Keeping dashboards simple and readable
- Using colour and emphasis appropriately
- Positioning KPIs and charts logically
- Checking calculations and reporting logic
- Making the dashboard easy to update
- Confirming it answers the original business question

After the course

Delegates will be able to:

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

Training format

Duration: One day

Delivery: Onsite instructor-led corporate training or live virtual instructor-led training

Practical method: See it → Understand it → Practise it → Apply it → Check it

Materials: Training material and electronic Certificate of Attendance

Tailoring: Corporate training can emphasise reporting situations relevant to the organisation

Related courses

Part 1 — Advanced Excel: Formulas, Data & Reporting

Calculate, analyse and report. Build reliable formulas, work more effectively with business data and turn larger datasets into useful information. [View course](#)

Power BI for Business — Introduction & Basic Dashboards

For Excel users who need to move from spreadsheet reports to interactive dashboards.

AI and Data Analytics Using Excel, Copilot and ChatGPT

For teams that want to use AI with Excel for analysis and reporting while keeping the numbers verified. [View course](#)

Next step

To book this course for your team, or to discuss a version tailored to your organisation, contact Arnold Muscat on 083 778 4903 or sales@collegeafricagroup.com.

Course page: collegeafricagroup.com/excel-dashboard-training/ | [What our clients say about us](#)

Regards

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