

Data Visualization Masterclass



10 – 12 April



Live Online Training



Only 17 Seats Available



6 CPD Points from IPM



COURSE OVERVIEW

Data visualisation and charts play an important role in any business, and facilitates the understanding of complex data on all levels of an organisation. Effective data visualisation and dashboards can facilitate and enhance decision-making, as well as drive effective management of complex variables. It is therefore important that all employees who work with data are comfortable with the available tools and charts to effectively, visually represent the complex data.

You will learn how to use Excel's formatting tools to create compelling visualisations, such as colour-coding and sparklines. The course will also cover more advanced techniques, such as creating interactive charts and adding slicers to allow users to filter data, and also how to use Excel's Power Query and Pivot Table tools to manipulate and summarize data for use in dashboards.

Additionally, the course will cover how to use Excel's data validation feature to ensure that data is entered correctly, as well as how to use macros to automate repetitive tasks. Throughout the course you will solve real-world problems, including creating a sales dashboard, a financial dashboard and a project management dashboard. By the end of the course, you will have the skills and knowledge to create appealing and effective dashboards for a variety of applications.



LEARNING OUTCOMES

- Learn how to develop effective storytelling techniques by utilising the best selection, design, and presentation of charts and graphs
- Identify the functions of interactive dashboards in MS Excel and become experts at creating interactive analysis
- Improve your Microsoft Excel skills and save yourself hours per day and eliminate stress
- Understand the procedure for setting up, formatting and maintaining an interactive dashboard
- Master the importance of visual perception in the process of presenting information and the advantages of infographics in MS Excel



WHO SHOULD ATTEND

This training course is aimed at intermediate to advanced Microsoft Excel users looking to take their skills to the level of presenting clean, focused and impactful information. Participants should be able to create, edit and manipulate spreadsheets containing formulae and functions. They should be able to create a basic chart and pivot table.

Those with titles like Head of Finance, Financial Manager, Accountant, Financial Analyst, Program Manager, Internal & External Auditors, Business Analytics Developer, Data Scientist, Marketing Executive, Marketing Manager, Sales Executive, Sales Manager, HR Executive, HR Officer, HR Manager, Data Analysts and Business Analysts who want to leverage Excel to stand out from the crowd, save hours each day, eliminate stress & gain a competitive advantage over their colleagues.



EXPERT TRAINER

The trainer for this course is a Chartered Accountant (SA), Associate Chartered Management Accountant, Chartered Global Management Accountant, with strong academic and industry experience. She holds a Master's degree in Management Accounting and has more than nine years of lecturing experience at the University of Pretoria and North-West University respectively, for which she has received distinctive teaching awards.

As a lecturer, she specialised in Management Accounting, Costing, Financial Management and Business Strategy to students of various levels. This is besides providing business simulations, supervising research projects and external moderation and reviewing of other universities' exam papers and study guides.

She has been delivering training to both government institutions and private sector companies in similar subject areas, including Microsoft Excel, financial and business skills training, as well as consultation in fields related to financial modelling in Excel, optimising power tools in Excel and Power BI.



01

Introduction to Data Visualisation

- Why use Excel
- Getting the data into a usable format (cleaning, tools, etc.)
- Understanding the different types of charts
- Using the chart that is best suited for your data and your goals
- Using the fancy charts, but not forgetting about the basic charts
- Looking for trends in the data
- Ensuring that the charts are user-friendly and scalable
- Avoiding “chart junk”– unnecessary visual elements that can crowd charts
- Using colour and white spaces effectively to improve comprehension

02

Conditional Formatting

- Conditional Formatting: Visualising data based on conditions specified
- Data bars, colour scales, icon sets, highlight cell rules, etc.
- Changing the appearance of a cell range based on the condition (or criteria)
- Conditional formatting taking precedence above normal formatting
- Using functions and formulas in conditional formatting to add flexibility
- Selecting data to attach conditions

03

Sorting & Decision Functions

- Introduction to sorting functions
- Creating filters with SUMPRODUCT
- Filtering on excel tables
- Data aggregation
- Table sorting

04

Advanced Formulas for Dashboards & Decisions

- Lookup functions
- How to use VLOOKUP
- How to use Index/Match
- Combining formulas
- How to use array formulas
- Array formulas demo

05

Creating and Formatting Charts

- Waterfall chart
- Tornado chart
- Sunburst chart
- Treemap chart
- Radar chart
- Step chart
- Stock chart
- Scatter chart
- Filled map
- Combo and progress charts
- Pivot Tables, Pivot Charts and Slicers

06

Dashboard Capabilities

- Combining a variety of charts – from more basic to more advanced, in line with what suits the data
- Hyperlinking
- Inserting shapes to attach a hyperlink
- Inserting icons to use in dashboards
- Pictographs

07

Data Validation

- Limiting entries into a cell
- Creating a dropdown list
- Data validation and functions

08

Forecast Sheets

- Forecasting future values based on past data
- Dates/times in the historical data at consistent intervals
- Averaged data points with same date stamps



FREE
Apple iPad



Booking Form

#: **DY**

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Please complete this form and return to: info@kapitalbiz.co.za & will confirm your booking.

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Date:

Authorized By:

Position / Signature:

Delegates Details (*please use block capitals*)

First Name & Last Name(s)	Email Address	Designation	Cell Number
1.			
2.			
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7.			

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- ☐ **(A) LOCAL**
Training Fee 3 (Days) = R 17,999 + VAT
- ☐ **(B) INTERNATIONAL**
Training Fee 3 (Days) = \$ 1, 300 (Online)