

Advanced Excel for Data Analysis & Visualization

You know how to use Excel — but are you using it to its full potential?

This two-day, hands-on workshop is designed to take your Excel skills beyond the basics and help you work smarter, not harder. Learn how to clean, analyze and visualize data using the powerful tools Excel has to offer — including Power Query, PivotTables, custom charts, form controls, dynamic dashboards and more.

Through real-world examples and expert instruction, you'll gain the confidence and capabilities to simplify complex data, tell clearer stories with visuals and make smarter business decisions.

For the best learning experience, we recommend using Microsoft Excel 365. Windows platform preferred.

Day 1

Session 1

Get and Transform Data With Power Query

- Understand the importance of “tidy” data for accurate analysis
- Use Excel's Get & Transform tools to clean and structure datasets
- Apply Power Query to automate repetitive data prep tasks
- Create and edit queries using the Power Query Editor

Session 2

Descriptive and Predictive Data Analysis With AI

- Summarize tabular data using recommended PivotTables and charts
- Enable and use Excel's built-in AI tools for data insights
- Perform descriptive analytics to reveal key patterns
- Use Analyze Data to ask natural-language questions about your data
- Forecast trends and outcomes with predictive analytics tools

Session 3

Configuring Data Visualizations With Basic Charts

- Select the best chart type based on your message and dataset
- Build charts from scratch for better control and customization
- Eliminate visual clutter to improve chart readability
- Design clear, effective graphs using single data series

Day 2

Session 1

Custom Visualizations With Multiple Series

- Configure combination charts to compare different data types
- Create gauge charts, Gantt charts and other custom visuals
- Build small multiples for side-by-side data comparisons

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Session 2

Building Interactive Workbooks With Formats, Conditional Formatting and Form Controls

- Apply custom number formats to enhance data storytelling
- Use formula-based conditional formatting to visualize key metric
- Insert check boxes, spin buttons and scroll bars to guide user input
- Create interactive elements that make your workbooks easier to navigate

Session 3

Building a Dynamic Excel Dashboard

- Gather and prepare relevant data for your dashboard
- Build dynamic components using charts, array formulas and form controls
- Assemble a dashboard that automatically updates with your data
- Present clear, at-a-glance insights for better business decisions



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