Intermediate Excel: One-day workshop

Optional prerequisite: Introductory Excel

Lesson 1: Introduction to Excel reporting

Lesson 2: PivotTables and Excel reporting

Lesson 3: PivotTables continued

Lesson 4: Excel for data visualization

Lesson 5: Introduction to Excel applications

Lesson 6: Capstone: Excel modeling

Learning Objectives

- Student can identify the traits of a successful Excel report
- Student can build interactive reports with PivotTables
- Student can use the advanced functionality of PivotTables
- Student can create visualizations in line with data visualization best practices
- Student can identify and reproduce the traits of a strong Excel application
- Student can build a financial model in Excel

Lesson plan developed by George Mount. For more resources like this, visit stringfestanalytics.com

Objective: Student can identify the traits of a successful Excel report
Description:

- Building an Excel report manually
- Excel tables and reports

Exercises: Build a manual Excel report
Assets needed: Sales report.
Time: 50 minutes

Lesson 2: PivotTables and Excel reporting
Objective: Student can build interactive reports with PivotTables
Description:

- PivotTables and tidy data
- Working the PivotTable grid
- Slicing and dicing
- Rolling up and drilling down
- Pivoting and reshaping

Exercises: Build a Pivot Table-driven Excel report
Assets needed: Continue with sales report
Time: 50 minutes

Lesson 3: PivotTables continued
Objective: Student can use the advanced functionality of PivotTables
Description:

- PivotTable layout and display
- PivotTable data updates
- Calculated fields and sets
- Grouping and ungrouping data
- Working with dates

Exercise: Drills
Assets needed: Sales data
Time: 50 minutes

Lesson 4: Excel for data visualization
Objective: Student can create visualizations in line with data visualization best practices
Description:

- The art & science of dataviz
- Chart choosing
- Chartjunk in Excel
- Working with PivotCharts

Exercise: Drills
Assets needed: Sports records
Time: 50 minutes

Lesson 5: Introduction to Excel applications
Objective: Student can identify and reproduce the traits of a strong Excel application
Description:

- Why build Excel applications?
- Cleaning and preparing data
- From input to output, via calculations
- Formatting for user experience

Exercise: Create an Excel application
Assets needed: Sports records
Time: 90 minutes

Lesson 6: Capstone: Excel modeling
Objective: Student can build a financial model in Excel
Description:

- Excel applications and modeling
- Establishing a baseline model
- Trend analysis and scenario planning
- Data validation and model distribution

Exercise: Create an Excel model
Assets needed: Sales data
Time: 90 minutes.