



# Macro Programming

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## Excel Dashboards

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### What is an Excel Dashboard?

- A **visual tool** that displays data & KPIs on a single screen
- Combines **charts, tables, and formatting** for quick insights
- Helps in **tracking trends, monitoring performance, and decision-making**

**Example:** COVID-2019 Dashboard (Cases, Deaths, Recovery, KPIs)



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## Excel Dashboard

### HR Management Dashboard

Source: Obvience

Actives Dashboard

Separations Dashboard

Total Emp  
650  
54%  
46%

Hourly  
Salary

92%  
8%

82%  
18%

Full Time  
Part Time

28%  
72%

50%  
50%

172 165  
81 105  
44 83  
<30 30-49 50+

Turnover  
255% 256% 254%

Year  
2015 2016  
2017 2018

Full/Part  
FT PT

Gender  
F M

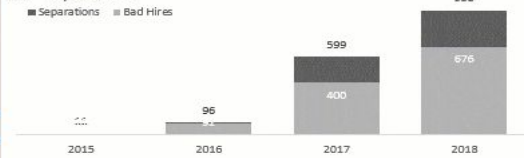
Region  
Central  
East  
Midwest  
North  
Northwest  
South  
West

Ethnicity  
Group A  
Group B  
Group C  
Group D  
Group E  
Group F  
Group G

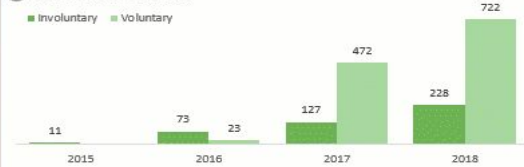
#### Total Active Employees



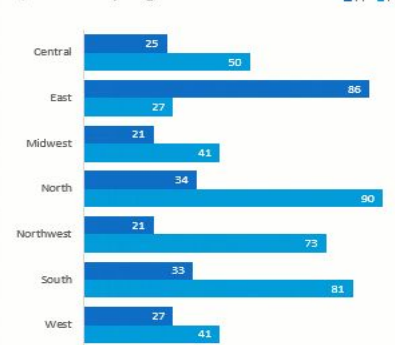
#### Separations



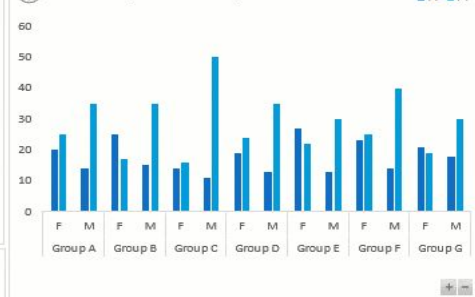
#### Termination Reason



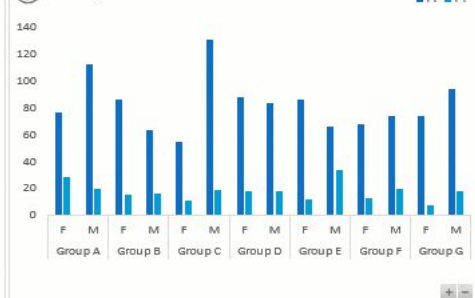
#### Actives by Region



#### Actives by Ethnic Group



#### Average Tenure - Months





## Advantages of Using Excel for Dashboards

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**Versatility:** Easy to use and widely accessible

**Data Handling:** Can manage complex calculations & transformations

**Interactivity:** Slicers, filters, and dropdowns allow dynamic exploration

**Customization:** Multiple chart types, colors, and formatting styles

**Cost-Effective:** Part of MS Office Suite (no extra tools needed)



## Dashboard Design Principles

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- **Grid Layout:** Use Excel's rows/columns for neat structure
- **Consistency:** Same fonts, colors, and formatting across visuals
- **Effective Colors:** Highlight key data (e.g., red for decline, green for growth)
- **Balanced Layout:** Use white space to avoid clutter and improve readability



## Understanding Objectives

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Before creating a dashboard:

- Define **purpose** clearly
- Identify **business questions** to answer
- Align with **organizational goals**
- Consider **target audience's expectations**



## Choosing KPIs

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- Select **metrics linked to goals** (e.g., Sales Growth %, Customer Churn Rate)
- Ensure KPIs are **specific, measurable, and time-bound**
- Limit number of KPIs → focus on **critical ones**
- Include both **leading** (predictive) and **lagging** (historical) indicators





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## Aligning Reports with Business Goals

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- Every element in dashboard should tie to a **business objective**
- Use consistent formatting for **clarity**
- Organize logically: important metrics at the **top/center**
- Add **context/benchmarks** (e.g., compare current sales vs. target)



## Tailoring to Stakeholders

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Understand stakeholder needs & data literacy levels

Adjust **detail/complexity** based on audience

- Executives → summary & KPIs
- Analysts → detailed data tables

Choose **visuals appropriate** for the audience (charts, maps, gauges)

Add **interactive elements** → slicers, filters, timelines



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## Summary

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- Dashboards = Visual storytelling with data
- Focus on **clarity, objectives, and stakeholders**
- Use Excel's strengths: **Charts, PivotTables, Slicers, Conditional Formatting**
- Keep it **simple, interactive, and meaningful**



## Practical Activity

	A	B	C	D	E	F	
1	Month	Region	Product_Category	Total_Sales	Profit_Percentage	New_Customers	
2	Jan-2024	North	Clothing	58416	17.79	145	
3	Feb-2024	North	Electronics	74384	23.85	70	
4	Mar-2024	North	Electronics	63874	9.61	139	
5	Apr-2024	West	Electronics	52690	19.74	107	
6	May-2024	North	Grocery	63416	20.19	162	
7	Jun-2024	West	Electronics	79648	12.84	73	
8	Jul-2024	East	Furniture	52690	14.63	132	
9	Aug-2024	South	Electronics	22386	20.41	92	
10	Sep-2024	East	Clothing	42197	22.84	50	
11	Oct-2024	North	Electronics	21481	12.87	180	
12	Nov-2024	West	Grocery	65061	18.08	69	
13	Dec-2024	North	Clothing	27839	5.27	193	



**THANK YOU**

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