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# Business Intelligence with Excel: Data Management, Analysis, and Reporting

11 – 15 January 2027
Los Angeles (USA)



# Business Intelligence with Excel: Data Management, Analysis, and Reporting

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## Introduction

This 1-week intensive Business Intelligence BI course is designed for professionals who want to enhance their data analysis and reporting skills. Whether you are a business intelligence analyst, a business intelligence developer, or a business intelligence specialist, this course offers a comprehensive understanding of modern BI concepts, techniques, and tools for analyzing data and generating impactful reports. The course covers everything from data extraction to visualization, and provides practical knowledge in transforming raw data into actionable insights that drive business success. By the end of the program, participants will possess the necessary skills to make data-driven decisions using Business Intelligence solutions and tools such as Power BI and Tableau, improving their ability to contribute to strategic decision-making processes.

## Course Objectives

By the end of this course, participants will be able to:

- Grasp the key concepts and components of Business Intelligence and data analysis.
- Develop advanced skills in data extraction, transformation, and visualization using BI tools.
- Generate and interpret actionable insights from data that are relevant to business performance.
- Master effective reporting techniques and present business metrics in a professional manner using BI tools.
- Understand the roles of different business intelligence positions, including that of a Business Intelligence Analyst, and develop the skills required for success in these roles.



# Course Outlines

## Day 1: Excel Data Management - Functions, Tools, and Techniques

- Advanced Data Validation: Lists, dates, and custom validation techniques.
- Table-Tools Techniques for enhanced efficiency in data management.
- Text Functions: LEFT, RIGHT, MID, TEXTSPLIT, TEXTJOIN for better text handling.
- Naming, editing, and managing cells and ranges in Excel for optimized data handling.
- Subtotal and Aggregate Functions for summarizing data.
- Data Lookup: XLOOKUP for locating text and values efficiently.
- Date Slicing: Extracting day names, weeks, months, years, and quarters.
- Error Handling Functions and Formula Auditing for precise data management.

## Day 2: Mastering Data Reporting with Pivot Tables

- Creating and designing Pivot Tables professionally.
- Customizing number formats and report layouts for better readability.
- Sorting and filtering data for deeper analysis.
- Analyzing dates, values, and percentages using Pivot Tables.
- Linking Pivot Tables to PowerPoint presentations for seamless reporting.
- Using advanced tools like Slicers and Conditional Formatting for interactive reports.

## Day 3: Power Query - Essential Skills for Data Management

- Importing data from tables, files, and folders using Power Query.
- Cleaning and transforming data using Power Query for better insights.
- Practical examples and real-world applications of data transformation.
- Importing Excel files and extracting tables from PDFs for analysis.
- Fetching data from websites and consolidating data from multiple sheets or files.
- Retrieving data from folders and creating streamlined data processes.

## Day 4: Data Modeling with Excel Tools

- Spin Button and Check Box Data Modeling using IF Functions.
- Option Button Data Modeling with IF Functions for decision-making models.
- List Box Data Modeling with the CHOOSE Function for data organization.
- Scenario Analysis with Scenario Manager to evaluate various business situations.



### Day 5: Excel Tips and Tricks for Enhanced Productivity

- Visualizing data with Sparklines for dynamic insights.
- Using creative fonts and formatting for professional BI reports.
- Protecting cells, sheets, and workbooks for security.
- Creating tables with Slicers for easy filtering and improved report interactivity.
- Focus Cell for improved data clarity and user focus in BI reports.
- Handy shortcuts for faster work in Excel and automating tasks with Flash Fill.

## Why Attend This Course: Wins & Losses!

- Gain a comprehensive understanding of Business Intelligence concepts and tools like Power BI, Tableau, and Microsoft Business Intelligence Software.
- Learn how to transform raw data into actionable insights that improve business performance.
- Develop the ability to create interactive and professional business intelligence reports that communicate complex data effectively.
- Enhance your decision-making skills with data-driven strategies for gaining a competitive edge in the market.
- Master the core skills and knowledge necessary for various business intelligence analyst positions, from data extraction to visualization.
- Understand the benefits of business intelligence and how it can enhance organizational decision-making and success.
- Learn from industry experts and gain practical experience in business intelligence reporting and data management.

## Conclusion

This Business Intelligence course equips professionals with the essential tools and techniques to turn raw data into strategic insights that enhance business performance. By applying the skills learned in this course, participants will be able to leverage business intelligence solutions effectively to create compelling reports, visualize data, and implement data-driven strategies. Whether you are preparing for a business intelligence analyst role or looking to enhance your expertise in data analysis, this course will provide the knowledge and practical skills needed to succeed in the ever-evolving field of Business Intelligence.

**Sign up now to enhance your career and become proficient in business intelligence reporting and decision-making strategies that drive business success.**

