Business Intelligence with Excel

1 – 5 March 2027
Geneva (Switzerland)

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Introduction

In today's business environment, decisions are no longer driven solely by intuition or experience. Data has become the main engine behind every strategic move. As the volume of data grows and its sources diversify within organizations, many entities face a real challenge in transforming scattered numbers into clear insights that support decision-making and reduce risk. This is where business intelligence comes into play—not as a theoretical concept, but as a practical tool that enables leaders and managers to understand reality and trends with greater accuracy.

The Business Intelligence with Excel course offers a practical and realistic solution to this challenge by leveraging a familiar and widely used tool within organizations. Excel is no longer just a tool for data entry or simple tables; it has evolved into a powerful platform for data analysis, report creation, and dashboard design that supports management at all levels.

This course focuses on the applied side of business intelligence, connecting daily operational data with key performance indicators. It enables participants to move beyond dealing with numbers to truly understanding and interpreting them, and ultimately making data-driven decisions. The course content has been carefully designed to suit work environments in the Middle East and North Africa, using realistic examples that reflect the needs of various sectors.

Course Objectives

The Business Intelligence with Excel course aims to empower participants to use Excel as a strategic decision-support tool, not merely as a technical application. The objectives have been thoughtfully developed to cover both conceptual and practical aspects of Business Intelligence, ensuring direct and applicable value in the workplace.

- Understand the concept of business intelligence and its role in improving organizational performance and decision-making.
- Link daily operational data with the organization's strategic objectives.
- Develop skills in data preparation and cleansing to improve data quality before analysis.
- Master the use of advanced Excel tools for analysis and indicator extraction.
- Analyze trends and patterns and identify potential opportunities and risks.
- Design professional business reports for senior and middle management.
- Build interactive dashboards that enable quick performance monitoring.
- Improve the ability to present data in a clear, visual, and persuasive way.

Course Outlines

Day One: Introduction to Business Intelligence Using Excel

- The concept of business intelligence and its importance in modern work environments.
- The difference between traditional reporting and decision-support analysis.
- The role of Excel within the business intelligence ecosystem in organizations.
- Types of data and their sources within organizations.
- Understanding the data lifecycle from collection to analysis.
- Best practices for working with data.

Day Two: Data Preparation and Readiness for Analysis

- Importing data from various sources into Excel.
- Cleaning data and handling missing values and common errors.
- Standardizing formats and structures to ensure accurate analysis.
- Using Excel tools to organize and structure data.
- Creating smart tables that facilitate subsequent analysis processes.
- Verifying data quality before starting analysis.

Day Three: Data Analysis and KPI Extraction

- Using advanced analytical formulas and functions.
- Building pivot tables to analyze large volumes of data.
- Analyzing performance across different time periods.
- Comparing results between departments, products, or regions.
- Extracting key performance indicators from raw data.
- Transforming numerical results into understandable insights.

Day Four: Reports and Dashboards

- Principles of effective report design for management.
- Selecting the appropriate charts for each type of data.
- Building interactive dashboards within Excel.
- Linking multiple data sources into a single dashboard.
- Simplifying data presentation without losing meaning.
- Enhancing the user experience when reviewing reports.

Day Five: Decision Support and Practical Application

- Linking analytical results to managerial decision-making.
- Using scenarios and forecasting tools in Excel.
- Analyzing risks and opportunities based on data.
- Preparing reports tailored for senior management.
- A comprehensive practical application on an integrated business intelligence project.
- Best practices for sustaining analytical processes within the organization.

Why Attend This Course: Wins & Losses!

- Learn how to apply business intelligence using a tool you already use at work.
- Gain practical skills that can be applied immediately without technical complexity.
- Improve decision quality and reduce reliance on personal estimates.
- Save time and effort in preparing reports and analyses.
- Enhance communication with management through clear and effective reports.
- Strengthen your professional opportunities in a competitive job market.
- Gain deeper insight into your organization's performance and success indicators.
- Understand the real capabilities and limitations of Excel without exaggeration.

Conclusion

The Business Intelligence with Excel course represents a real opportunity to move from traditional data usage to a strategic approach that serves organizational goals. It does not focus solely on learning new tools or formulas; rather, it aims to build an analytical mindset capable of reading numbers and understanding what lies behind them. This shift in thinking is exactly what organizations need today to keep pace with rapid market changes.

Through balanced training content that combines concepts with hands-on application, the course helps participants build a solid foundation in Business Intelligence using Excel—without the need for complex tools or major technological investments. It also provides a practical framework that can be developed and expanded as business needs grow.

Whether you are a manager seeking more accurate decisions, a team leader who needs clear performance visibility, or an employee looking to strengthen analytical skills, this course is a practical step toward using data intelligently. It is not just training; it is a real investment in your ability to understand, analyze, and make decisions with confidence.