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

Lisbon (Portugal)

22 - 26 December 2025

UK Traininig
PARTNER

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

Code: PS28 From: 22 - 26 December 2025 City: Lisbon (Portugal) Fees: 4400 Pound

Introduction

This 5-day intensive course provides participants with a comprehensive understanding of modern Business Intelligence BI concepts, techniques, and tools for data analysis and report generation. Designed for professionals seeking to enhance their ability to make data-driven decisions, this course focuses on transforming raw data into actionable insights that drive business success. By the end of the program, participants will possess practical skills in using BI tools to analyze data, create visual reports, and implement data-driven strategies to improve business performance.

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.
- Master effective reporting techniques and present business metrics professionally.

Course Outlines

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

- Advanced Data Validation: Lists, dates, and custom validation.
- Table-Tools Technique for enhanced efficiency.
- Text Functions: LEFT, RIGHT, MID, TEXTSPLIT, TEXTJOIN.
- Naming, editing, and managing cells and ranges.
- Subtotal and Aggregate Functions.
- Data Lookup: XLOOKUP for locating text and values.
- Date Slicing: Extracting day names, weeks, months, years, and quarters.
- Error Handling Functions and Formula Auditing.

Day 2: Mastering Data Reporting with Pivot Tables

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

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Day 3: Power Query - Essential Skills for Data Management

- Importing data from tables, files, and folders.
- Cleaning and transforming data using Power Query.
- Practical examples and real-world applications.
- Importing Excel files and extracting tables from PDFs.
- Fetching data from websites.
- Consolidating data from multiple sheets or files.
- Retrieving data from folders.

Day 4: Data Modeling with Excel Tools

- Spin Button and Check Box Data Modeling with IF Functions.
- Option Button Data Modeling with IF Functions.
- List Box Data Modeling with the CHOOSE Function.
- Scenario Analysis with Scenario Manager.

Day 5: Excel Tips and Tricks for Enhanced Productivity

- Visualizing data with Sparklines.
- Using creative fonts for professional reports.
- Protecting cells, sheets, and workbooks.
- Creating tables with Slicers for easy filtering.
- Focus Cell for improved data clarity.
- Handy shortcuts for faster work.
- Automating tasks with Flash Fill.

Why Attend This Course: Wins & Losses!

- Gain a comprehensive understanding of Business Intelligence concepts and tools like Power BI and Tableau.
- Learn how to transform raw data into actionable insights that drive business success.
- Create interactive visual reports to communicate complex data effectively.
- Enhance your decision-making skills with data-driven strategies for a competitive market advantage.

Conclusion

This course equips you with both the theoretical knowledge and practical skills to turn data into strategic insights that drive informed business decisions. By applying the tools and techniques of Business Intelligence, you'll be able to analyze data, create compelling reports, and deliver actionable recommendations that enhance business performance and support your professional growth.

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