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Course Structure & Outline

BUSINESS INTELLIGENCE DASHBOARDS

Learn to make Beautiful, Interactive and Insightful
Business Dashboards using Excel

If I had to summarize the course in 2 sentences...

> In this course you'll learn the step by step process to create beautiful, interactive and insightful Business Dashboards using Excel.
>
> +
>
> get access to valuable resources that will improve your Dashboard Skills in the long run...

The course is split into 2 parts

THE DASHBOARD TOOLKIT *(Library of tools and techniques that you can use in your own Dashboards)*
- o Module 1 : Dashboard Planning and Pre-Work
- o Module 2 : Advanced Excel Techniques
- o Module 3 : Visualization & Charting Library
- o Module 4 : Dashboard Formatting & Design Principles

CASE STUDIES *(Learning to create Dashboards from Scratch)*
- o HR Dashboard Case Study
- o Sales Performance Dashboard Case Study
- o Company Cost Structure Dashboard Case Study

Post Course Completion you'll be given a comprehensive dashboard assignment

MODULE 1 : DASHBOARD PLANNING AND PRE-WORK

Module Overview : This short module will help you define a step by step process, each time you are asked to create a Dashboard.

Instead of doing the tasks randomly, this module will teach you the exact steps required to complete a Business Dashboard

Module Videos

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• Dashboard creation process

Additional Downloads

• Dashboard Planner - How to Plan a Dashboard (pdf)
• Dashboard Process - Presentation

MODULE 2 : ADVANCED EXCEL TECHNIQUES

Module Overview : You'll learn some out of the box advanced excel tricks (like automation, auto-updating, refreshing, creating relationships etc..)

These excel tricks are going to be the core of your dashboard modelling, they will be supporting different visualization of critical calculations

Most of these tricks will remain the same, you can tweak and re-use them over and over again in your own Dashboards too!

Module Videos

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• Use of Table + Dynamic Ranges
• Dynamic Comments
• Advanced cell naming tricks & Dependent dropdowns
• Publishing Reports Online
• Combining data from multiple sheets

Module Videos Continued..

- Collecting data using slicers in Pivot Tables
- Data Models in Excel 2013

VBA Techniques

- Working Based on Cell Selection using VBA
- Refreshing Pivot tables with VBA
- Advanced Filter using VBA

MODULE 3 : VISUALIZATION AND CHARTING LIBRARY

Module Overview : This is your visual library. You'll learn different visualization ideas (and their implementation) based on different types of data and analysis.

You can choose difference charts & visualizations and can modify them or use them as is to fit in your own Dashboards

Module Videos

- How Form Controls Work (7 Videos)
- Camera Tool in Excel
- DOT/Ratings Chart
- Dynamic Calendar Slicers
- Dynamic Text Boxes
- Funnel Chart
- Heat Maps – Using Conditional Formatting
- Highlight Parts of the Stacked Chart
- Plotting cities on a Map Chart
- Picture Vlookup
- Sparklines & REPT function chart
- Adding Total to Stacked Charts
- Benchmark / Threshold Charts

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Module Videos Continued..

- Max and Min Points & highlighting data - using #N/A! error technique
- Adding Direct Legends to Line Charts
- Target Chart for unique targets
- Conditional Formatting in Charts
- Infographic Charts 1
- Infographic Charts 2

MODULE 4 : DASHBOARD FORMATTING AND DESIGN

Module Overview : In this module you'll learn

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Module Videos

- How to set up the Dashboard Screen
- Positioning Techniques
- Alignment Techniques
- Cleaning the Clutter
- Principles of Design
- Space Management in Dashboards

Part 2 - Case Study : HR Dashboard

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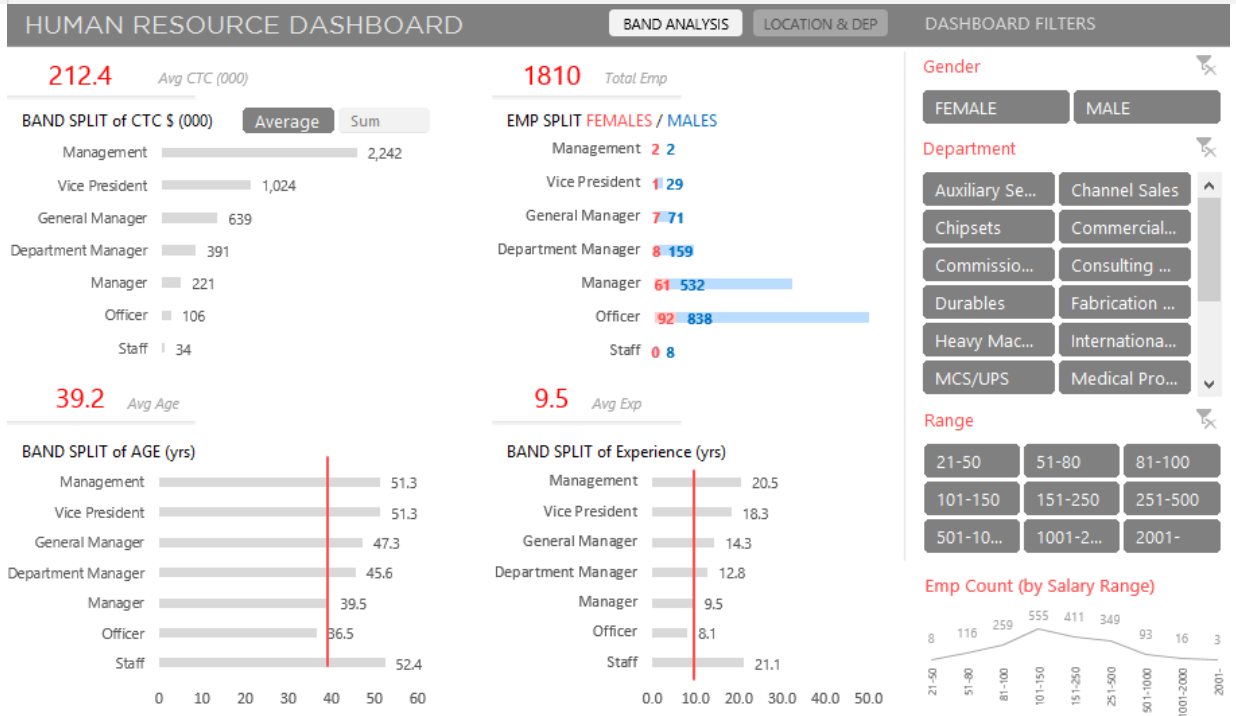
This is the replica of the HR Dashboard that you'll be working on

Case Overview : Using an employee data dump of a large company, you'll learn how to create a beautiful and insightful Dashboard from scratch. We'll be using and practically applying principles learnt in the dashboard creation process

Module Videos

- Case Overview & Dashboard Planning
- Performing Calculations
- Creating Visualizations
- Adding Insights
- Finishing and Formatting

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After you are done with this case, you'll find yourself very confident of carrying out other types analysis and turning it into beautiful & meaningful Dashboard

SALES ANALYSIS - DASHBOARD

	2011											2012					
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	J

◀ ▶

Type	Region	Channel	Category
Cou... Ebo... Tem...	North West South	Affil... Org... Pro...	Gi... Lo... Mi... Pr...

$ 49111.2	**$ 5580.2**	**$ 743.0**	**998**
Total Sales till Selcted Date	Max Sales in May 2012	Min Sales in Aug 2011	Sales Count

Sales Timeline

Product Mix

	Sales $ (000)	% Contrib	Sales Count
BMC-COURSE	$ 7.96 k	16%	78
PFSCH-TEMP	$ 6.26 k	13%	87
CFM-COURSE	$ 5.75 k	12%	86
RE-TEMP	$ 5.05 k	10%	65
BS-TEMP	$ 4.83 k	10%	89
STRTUP-TEMP	$ 4.54 k	9%	81
PF-TEMP	$ 3.61 k	7%	84
P&L-TEMP	$ 3.42 k	7%	90
CF-TEMP	$ 3.32 k	7%	84
R&M-EBK	$ 2.97 k	6%	75
FFCHARTS-...	$ 1.39 k	3%	11 / 2
FS-EBK		0%	67

Channel	$ 000	% Contrib	Region	$ 000	% Contrib	Type	$ 000	% Contrib
Affiliate	20.4 k	41%	North	22.8 k	46%	Course	13.7 k	28%
Organic	5.5 k	11%	West	21.0 k	43%	Ebook	3.0 k	6%
Promotional	23.2 k	47%	South	5.3 k	11%	Template	32.4 k	66%
Total	49.1 k	100%	Total	49.1 k	100%	Grand Total	49.1 k	100%

This is the replica of the Sales Dashboard that you'll be working on

Case Overview : Using an sales data dump of an online tutoring company, you'll learn to build meaningful analysis and creating a Dashboard from scratch.
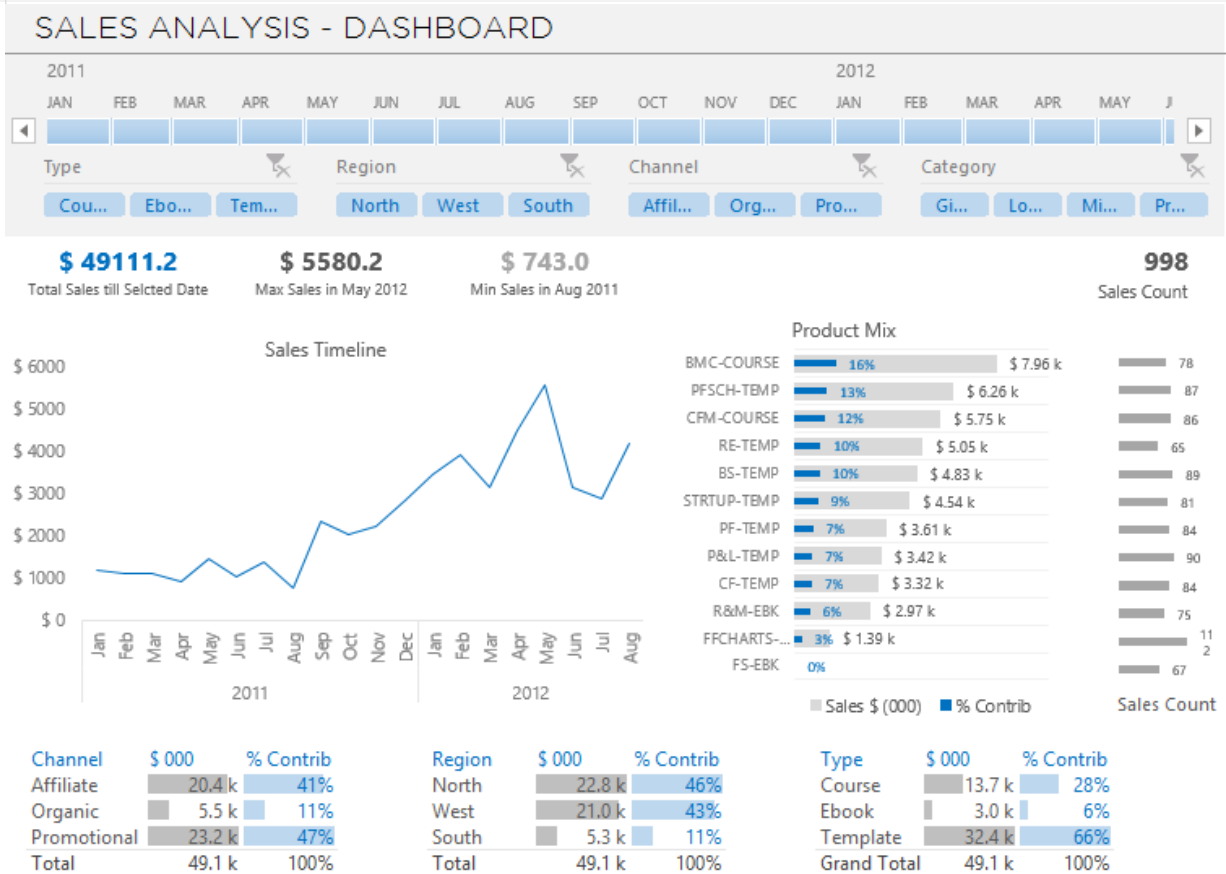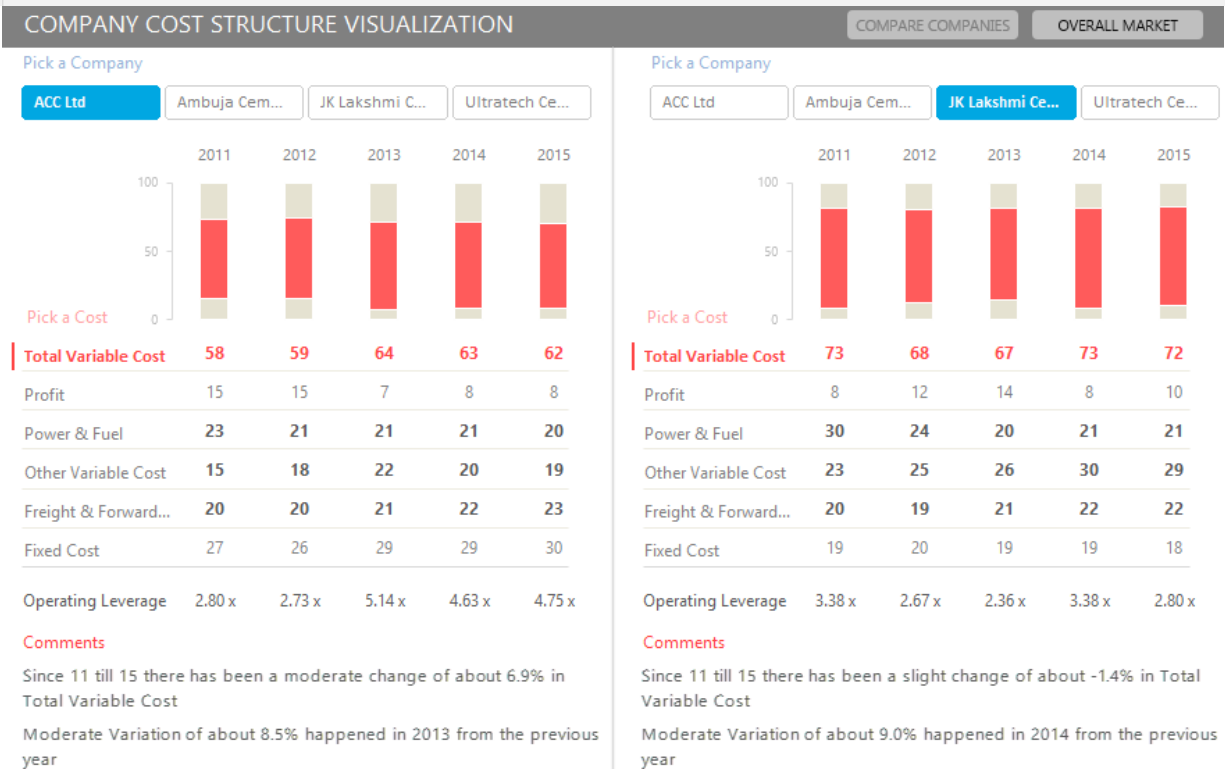
Module Videos

• Case Overview & Dashboard Planning

• Performing Calculations

• Creating Visualizations

• Adding Insights

• Finishing and Formatting

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Complexity

After you are done with this case, you'll find yourself very confident of carrying out other types analysis and turning it into beautiful & meaningful Dashboard

COMPANY COST STRUCTURE VISUALIZATION | COMPARE COMPANIES | OVERALL MARKET

Pick a Company

| ACC Ltd | Ambuja Cem... | JK Lakshmi C... | Ultratech Ce... |

	2011	2012	2013	2014	2015
Total Variable Cost	58	59	64	63	62
Profit	15	15	7	8	8
Power & Fuel	23	21	21	21	20
Other Variable Cost	15	18	22	20	19
Freight & Forward...	20	20	21	22	23
Fixed Cost	27	26	29	29	30
Operating Leverage	2.80 x	2.73 x	5.14 x	4.63 x	4.75 x

Comments

Since 11 till 15 there has been a moderate change of about 6.9% in Total Variable Cost

Moderate Variation of about 8.5% happened in 2013 from the previous year

Pick a Company

| ACC Ltd | Ambuja Cem... | JK Lakshmi Ce... | Ultratech Ce... |

	2011	2012	2013	2014	2015
Total Variable Cost	73	68	67	73	72
Profit	8	12	14	8	10
Power & Fuel	30	24	20	21	21
Other Variable Cost	23	25	26	30	29
Freight & Forward...	20	19	21	22	22
Fixed Cost	19	20	19	19	18
Operating Leverage	3.38 x	2.67 x	2.36 x	3.38 x	2.80 x

Comments

Since 11 till 15 there has been a slight change of about -1.4% in Total Variable Cost

Moderate Variation of about 9.0% happened in 2014 from the previous year

This is the replica of the Cost Structure Dashboard that you'll be working on

Case Overview : This is my dashboard entry that won Chandoo's DB Contest in 2016. In this section, I will be teaching every minute detail about creating this Dashboard

Module Videos

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• Case Overview & Dashboard Planning

• Performing Calculations for Screen 1

• Setting up the Dashboard for Screen 1

• Performing Calculations for Screen 2

• Setting up the Dashboard for Screen 2

• Overall Finishing and Formatting

After you are done with this case, you'll find yourself very confident of applying complex automation techniques in your own dashboards

What the Dashboard course will not teach you...

The course is a step above the beginner / intermediate level. I will NOT be covering the nitty-gritties of Excel in this course. You need to have basic to intermediate level of Excel Skills. To be more specific you should be comfortable working with

- Simple Formulas (like IF, Vlookup, Index Match, SumIf, CountIf etc..)
- Pivot Tables
- Charts (creating, editing and formatting)
- Some bit of conditional formatting

If you are not confident about Excel and want to learn Excel in depth along with Dashboards, then I strongly suggest you to enroll in a combined course (BI Dashboards + Master Excel Step by Step). You can choose the combo option in the pricing plan

Master Excel Step by Step is a comprehensive course on Excel and covers all important concepts in Excel (Basic to Advanced)

Hi, my name is Chandeep! I am assuming that you already know me through my blog. But if you are new around here, let me give you some quick listicles about me

- I stay in Gurgaon in India
- I used to work as a Financial Analyst for an Investment Bank in Mumbai (India). Back in December 2013 I quit my full time job to start Goodly
- Being an Analyst, Excel and PowerPoint were the 2 tools that I became really good at and Goodly is all about teaching people how to use these tools effectively
- I now run a blog (www.goodly.co.in) which has over 300+ posts on the practical use of Excel in business

Over the last 3 years I have trained over 2000 professionals (live workshops + online) in some of large companies like Hewlett Packard, Canon, Reliance Retail, Future Group, Larsen & Toubro, BMW, IL&FS Group, Aditya Birla Financial Services, Fiserv, Hindalco, Kotak Bank, Parle Ago, Unicharm

look forward to see you inside!

GET STARTED!