Visual Analytics & Dashboard Design (Excel) i2VSA

Creating actionable information and insights

Details

Cursusduur

2 dagen

Tijd

09:30 - 17:30, 09:30 - 17:30

Prijs

Kennisgebied

Performance Management, Finance Operations &
Reporting

Bestemd voor

Accountants in business, Overheidsaccountants,
Overige financieel professionals, Controllers,
Auditor

Niveau

Advanced

Finance in business

Datum en locatie

The course is in English, the Excel parts are based on the English version of Excel. Day one
will cover requirements, advanced visual techniques, dashboard design and storytelling with

Inhoud

Finance professionals are dealing with increasing amounts of data and a growing demand for analytics to provide fresh insights and greater clarity for decision making. This course teaches participants how to create and use advanced visual techniques to generate new insights, support better analysis and enable clearer decision making with better reports and 'one page/ one screen' dashboards.

In addition to its role in improving 'traditional' descriptive analytics, this course will also introduce data visualisation as part of Exploratory Data Analysis (EDA) within advanced data analytics/ data science.

Participants successfully completing the optional post course project in dashboard design will be awarded an internationally recognised Certificate of Competency issued by the Institute of Business Analytics.

Doelstelling

You will learn to:

- Use a proven process to clearly identify the information users need to take action and make key decisions.
- Understand key aspects of human memory and visual processing that affect good and bad visual design for reports and dashboards and how to apply these principles;
- Apply advanced visual techniques to: identify and focus on priorities, make choices, explore data, generate insights, rapidly assess performance, tell stories and make connections with data.
- Identify the potential for information rich dashboards, how to design them to provide actionable information, what data to include/ use as supporting analysis and how to structure them to tell stories with the data.

Inhoud

The course is conducted in a highly participative workshop style, with practical group discussion and break-out sessions. It comprises the following key topics:

- Pre-course learning - understanding the challenges of current reporting and information and what needs to be improved
- Analytics and the future of finance

- A process for producing actionable information
- The role of visualisation in descriptive and advanced analytics
- Visual techniques for understanding, focus, insights and exploration - key mistakes in use of common techniques and advanced visual tools and where and how to use them
- Effective dashboard design and telling stories with data, combining key techniques to tell a story on a page
- Introducing dashboards and visual reporting/ EDA into your organisation
- Showcase of past participants dashboard designs implemented at workplace
- Optional post course project to apply the ideas learnt to build a dashboard for the participant's organisation. Successful completion will earn a certificate of competency in Visual Analytics and Dashboard design

Once the principles of design, structure and data storytelling are understood, then theses can be applied using any suitable software. For participants who want to use or prototype designs in Excel using advanced visual techniques not included as standard Excel charts, the course will cover about 2 hours hands on to practice creating these charts. The companion course i3BAR is recommended for participants who want to add automation and build robust, reliable and interactive dashboards and reports.

Bestemd voor

Related courses : The companion course 'Integrated, interactive & intelligent Excel models for Business Analytics & Reporting (i3BAR)' provides a best practice methodology for automating routine reporting and model updating as part of robust, reliable interactive reports and simulation. Where i2VSA covers what reports/ analysis to produce to provide actionable information and insights using advanced visual techniques, i3BAR teaches how to build them. Excel training in i2VSA focuses on how to create the advanced visual techniques covered in the course for those participants who will be using Excel rather than other web/ software based analytics tools.

Target audience

This course is for accounting, finance and other business professionals who want to:

- Prepare more effective, actionable information through better visual reports and dashboards.
- Identify fresh insights and patterns in data and understand the role of this work in wider data analytics and data science.
- Understand what can/ should be done in terms of better information and analysis in order to plan and adapt for the changing role of the finance function.

Docenten

Elaine Chong

Ms. Elaine Chong, master developer and trainer of the i3BAR course in 12 countries through national accounting bodies. Prior to her 10 years of developing, refining and teaching i3BAR internationally, Elaine was Financial Controller at leading international businesses. During this time she received numerous global awards for management reporting based on her ability to deliver reporting accuracy, fast reporting and quality of information. Elaine left her well-paid job to pursue her passion to develop and launch the best practice methodology (i3BAR) to liberate finance professionals worldwide from the lost time and frustrations of traditional Excel based reporting. Elaine is a Chartered Accountant, a member of the Institute of Singapore Chartered Accountants (ISCA), she holds an MBA and is a Certified Microsoft Office Specialist and Certified US master trainer (CMT) with the distinguished Master Trainers Academy, USA.

Simon Lindley

Mr. Simon Lindley, Chartered Accountant, Chartered Engineer (IT based) and MBA with a Masters level Diploma in board-level governance. Simon is an international speaker, trainer and consultant in business and visual analytics with a particular focus on helping finance teams and individuals prepare and adapt to the growing importance of business and data analytics.

Locatie

De cursus vindt plaats in NBA in Amsterdam

Adres

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[↗] Routebeschrijving