



Excel Financial Dashboard Design and Reporting Training Course

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Overview

Excel Financial Dashboard Design and Reporting Training Course is a one-week course for financial analysts, accountants, controllers, FP&A specialists, and finance managers, who leave with an Excel Financial Dashboard and Reporting Pack. Participants build controlled source tables, refreshable financial data workflows, financial KPI dashboards, variance analysis views, interactive management reporting, and decision-ready finance presentations. The course connects Power Query, PivotTables, PivotCharts, formulas, slicers, validation checks, and visual narrative into one reporting cycle. Agile Leaders Training Center develops practical Excel dashboard design capability.

Who Should Attend

- Financial analysis functions responsible for trends, ratios, forecasts, and decision support
- Accounting functions responsible for reliable source data and period reporting
- Controllershship functions responsible for variance review, controls, and management packs
- FP&A functions responsible for budgets, forecasts, scenarios, and performance commentary
- Finance management functions responsible for executive reporting and performance conversations

The course assumes participants can use Excel formulas and structured worksheets at work, and leaves out basic spreadsheet navigation, financial statement theory, VBA development, and Power BI model design.

Departments and Industries

The course supports departments and industries that turn financial records into recurring management information.

- Finance, accounting, controllership, treasury, and FP&A departments
- Internal audit, performance management, strategy, and business partnering functions
- Financial services, insurance, professional services, and technology organizations
- Manufacturing, retail, logistics, energy, and construction operations
- Healthcare, education, hospitality, and public-service organizations

Learning Objectives

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



- Build controlled tables and a financial data dictionary
- Apply Power Query steps to prepare refreshable finance data
- Analyze KPIs, trends, variances, and management exceptions
- Use PivotTables, PivotCharts, slicers, and timelines effectively
- Evaluate dashboard layout, chart choices, and validation controls
- Build an executive financial dashboard and reporting pack

Course Agenda

Day 1: Structure Financial Reporting Data

- Management Question and Decision Map
- Financial Source-System Inventory
- Excel Table and Field-Naming Standard
- Financial Data Dictionary Template
- Completeness, Validity, and Reconciliation Checklist

Day 2: Prepare Refreshable Finance Data

- Power Query Connection and Staging Pattern
- Data-Type, Missing-Value, and Error Controls
- Query Merge and Append Design
- Chart of Accounts Mapping Table
- Refresh Sequence and Exception Log

Day 3: Build Financial Measures and Analysis

- Financial KPI Definition Sheet
- Actual, Budget, and Forecast Variance Method
- Period, Year-to-Date, and Rolling-Trend Logic
- Ratio and Margin Calculation Controls
- PivotTable Analysis and Drill-Down Structure

Day 4: Design Interactive Management Dashboards

- Dashboard Audience and Information Hierarchy
- Chart Selection and Comparison Matrix
- PivotChart and Dynamic Range Pattern
- Slicer, Timeline, and Report Connection Map
- Executive Commentary and Exception Narrative



Day 5: Practice Dashboard Delivery

- Exercise: Validate Source Tables and Reconciliations
- Exercise: Transform and Refresh a Finance Dataset
- Exercise: Analyze Variances and Financial KPIs
- Exercise: Test Interactions and Management Messages
- Capstone: Excel Financial Dashboard and Reporting Pack

Practical Exercises

The course uses suggested activities based on reporting situations in services, manufacturing, retail, healthcare, and project operations.

- Suggested activity: define management questions, organize source tables, map accounts, and build reconciliation controls for a monthly dataset.
- Suggested activity: create Power Query steps that combine files, correct types, flag errors, and support a repeatable refresh.
- Suggested activity: calculate KPIs and variances, build PivotTable views, and select charts for actual, budget, and forecast comparisons.
- Suggested activity: assemble filters, dashboard panels, commentary, and validation evidence into an executive reporting pack.

FAQs

Who suits Excel financial dashboard design training, and what does it assume?

Finance professionals who prepare recurring analysis or management reports suit the training; it assumes working familiarity with formulas and structured worksheets while excluding basic Excel navigation and software development.

How does Excel financial dashboard design differ from financial modeling training?

Excel financial dashboard design organizes, refreshes, analyzes, and presents recurring performance information, while financial modeling training concentrates on assumption-driven projections, valuation, investment cases, and scenario structures.

How does Power Query support an Excel financial dashboard?

Power Query supports an Excel financial dashboard by recording repeatable connection and transformation steps, helping finance teams combine files, standardize fields, flag errors, and refresh prepared tables.



Which financial KPIs belong on an Excel dashboard?

Financial KPIs belong on an Excel dashboard when they answer a defined management question, have an agreed calculation and owner, reconcile to controlled data, and support a comparison such as target, budget, prior period, or trend.

How should charts be selected for financial management reporting?

Charts should be selected according to the comparison: lines for trends, bars for category differences, variance charts for plan-versus-actual movement, and compact indicators for status, with consistent scales and limited decoration.

Conclusion

Participants take back an Excel Financial Dashboard and Reporting Pack containing a data dictionary, query flow, KPI definitions, variance views, interactive controls, validation evidence, and executive commentary. It changes disconnected spreadsheet tasks into a repeatable reporting cycle. The pack supports refresh, review, analysis, presentation, and retained control evidence.



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