Excel for Data Analysis & Visualisation

Workshop Overview

This practical session is designed for Excel users who work with exported reports, raw data files, or service-level information. You'll learn how to clean messy data, build dynamic summaries, and create visuals that tell a clear story, all using built-in Excel tools.

This hands-on session is ideal for anyone who works with exported data, spreadsheets, or system reports and wants to streamline their analysis process. We'll cover powerful but accessible tools to clean, transform, and summarise data; no macros or coding needed.

Who it's for:

Experienced Excel users who are already confident writing formulas such as VLOOKUP, INDEX/MATCH, IF or other logic functions. Professionals who can already create and adjust basic charts and summaries.

Workshop Outline

Clean and Prepare Your Data

- ❖ Identifying common issues in real-world datasets (blanks, merged cells, inconsistent values)
- ❖ Using Power Query to:
  - ➢ Import and reshape data
  - ➢ Clean headers, fix formats, and remove unwanted rows/columns
  - ➢ Create reusable queries for recurring tasks

Explore with Tables and Dynamic Formulas

- ❖ Creating and managing Excel Tables
- ❖ Using structured references to simplify formulas
- ❖ Leveraging dynamic array functions such as SORT, UNIQUE, FILTER
- ❖ Building dynamic summary tables without PivotTables

Visualise Your Findings

- ❖ Choosing the right chart type for your message
- ❖ Creating charts from dynamic formulas and spill ranges
- ❖ Making visuals automatically update with your data
- ❖ Adding interactivity (dropdowns, named ranges, slicers)

Analyse with PivotTables

- ❖ Building PivotTables from cleaned data
- ❖ Grouping, filtering, and calculated fields
- ❖ Comparing PivotTables to formula-based approaches

Create a Summary View

- • Bringing together your cleaned data, summaries, and visuals
- • Building a one-page summary report
- • Final polish: titles, formats, and layout tips

Wrap-Up

- Recap of tools and techniques covered
- Where to go next: templates, automation, Power BI
- Q&A and feedback

To find out more or book a place on one of our virtual public scheduled courses contact our admin team on 0247 736 0040 or email admin@datacraftsolutionsltd.com.

Multiple delegate booking? Contact the team for a private virtual or on-site course.