

How to turn your Excel raw data into a dashboard

Understanding your brokerage firm's data can be a frustrating, confusing and exhaustive task.

Why does it have to be so hard? After all....

- ☞ If you want to know how much bandwidth your family is using every month, you can just sign onto your internet provider's website and see a graph. Wow!
- ☞ If you want to know how many people have visited your company website, you can log onto Google and get your analytics. Cool!
- ☞ If you want to know how much weight you've lost (or put on) in the last month, you can sign onto your fitness app on your smart phone and see a graph plotting out how well you've done (except for that week in Mexico) ... oops!

But if you want to calculate a retention rate, an average premium or what the policy count is per employee, it feels like you need a Ph.D. in math!

This course is targeted at supervisors or managers who want to have an easier time working with data that is generated by your various systems. There may be some differences between the various BMS systems and the type of data that gets extracted, but overall, it's a basic course in Excel and dashboard modelling.

Course plan: How to turn your Excel raw data into a dashboard

General information:

- ❑ **Title of this activity:** How to turn your Excel raw data into a dashboard
- ❑ **Length:** 2 hours (static online course, webinar) or 3 hours (onsite)
- ❑ **Number of participants:** N/A
- ❑ **Targeted clientele:** Anybody who plays any role in a company and who wants to better understand how to work with data
- ❑ **Training material:** All of the participants will receive a training manual. The facilitator will use a Power Point presentation as a visual support.
- ❑ **Learning strategies:** This course is deployed as an interactive lecture, with several group discussions. The participative style of presentation is very important with these types of sessions in order to fully implicate all of the participants in the learning process.

Main objective:

The main objective of this course is to show how Excel can be used to develop dashboards, making management of data easier and more fun!

Specific objectives:

At the end of this session, the participant will be able to:

- Identify what data is required to generate the indicators most managers are looking for
- Understand what type of 'graph' is best used for certain types of information
- How to build a graph that responds to data changes and filters

Requirements

- ❑ This course is developed around the functionality of **Excel 2013** or higher. While some of the more advanced aspects of dashboards are easier to design in these versions, users of Excel 2010 will still be able to follow along.

Program

✓ **Chapter #1 – what is the information we’re looking for?**

- ❑ The top 5 indicators most offices should be looking for
- ❑ How to identify the input required to get the output we need
- ❑ Where do I find the input I need? What does it look like now?

✓ **Chapter #2 – clean data**

- ❑ How to know if your data is ‘clean’ or not
- ❑ Cleaning out your data

✓ **Chapter #3 – Pivot tables 101**

- ❑ What are they exactly?
- ❑ What do all the buttons mean?
- ❑ How to change things up!

✓ **Chapter #4 – Building the dashboard**

- ❑ Linking data to graphs
- ❑ Cleaning it up and making it pretty