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COURSE BROCHURE

Spreadsheet Data Visualisation and Analysis Training Course

18 – 22 July 2027
Online

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Registered in the United Kingdom and Saudi Arabia

Spreadsheet Data Visualisation and Analysis Training Course

Ref: 3142_119374 **Date:** 18 – 22 July 2027 **Location:** Online **Fees:** 2900 GBP

Spreadsheet Data Visualisation and Analysis is a 1-week training course for business analysts and administrators who report from spreadsheets, built around one named work product: a spreadsheet performance summary for one business area. Organisations now expect monthly figures to arrive faster, read more clearly and survive questioning from senior readers, and most of those figures still pass through a workbook first. Jupiter Prime Training runs this course for people who own that reporting work.

Why Spreadsheet Data Visualisation and Analysis Matters Now

Three pressures shape spreadsheet reporting today. Leaders want shorter reporting cycles with fewer manual corrections. Finance, operations and service units share source tables, so one badly structured column spreads errors across several reports. Readers expect a chart to show the message at a glance. An organisation with well-structured tables traces every figure to its source and explains a variance in minutes; one without them spends review meetings arguing about which number is right. The course rests on tidy table design, clear chart choice and disciplined comparison of actual results against targets.

Who Gains Most from Spreadsheet Data Visualisation and Analysis

- People who compile periodic performance figures from exported files
- Staff who maintain shared workbooks other departments reuse
- Coordinators who prepare charts for management meetings
- Officers who track budgets, volumes or service levels against agreed targets
- Assistants who answer ad hoc questions from existing tables

A reporting unit gains most when several members attend together and agree one table layout and chart style.

Spreadsheet Data Visualisation and Analysis Capabilities

Participants move from raw exported rows to a summary page that a reader can trust, question and reuse without rebuilding it each month.

- Design a tidy source table with consistent headers — the analyst refreshing each period
- Build summaries and lookups that reconcile to source totals — the manager signing off figures
- Weigh chart forms against the comparison readers need — the monthly pack audience
- Calculate trends and variances against target — the budget holder explaining a gap
- Apply selectors to one summary page — the reader exploring results alone
- Communicate a page's message in a headline — senior decision makers

Key Spreadsheet Data Visualisation and Analysis Terms

- Tidy table — one variable per column, one record per row, one value per cell.
- Lookup — a formula returning a value from another table by matching a shared key.
- Summary table — a grouped view totalling or counting records by category without changing the source.
- Variance — the gap between an actual figure and its target or prior period.
- Moving average — the average of recent periods, smoothing noise to reveal direction.
- Conditional formatting — rules that restyle cells meeting a condition, highlighting exceptions.

Spreadsheet Data Visualisation and Analysis Day by Day

Day 1: Reporting Context and Table Structure

- Reader Needs Mapping — Which Questions the Monthly Report Must Answer
- Tidy Table Layout — How Exported Rows Become One Reliable Source
- Data Type and Header Checks — Which Columns Break Totals and Sorting
- Text Cleaning Formulas — Removing Spaces, Splitting Codes and Fixing Case
- Duplicate and Blank Row Handling — Deciding What Counts as a Record

Day 2: Summaries, Lookups and Reconciliation

- Grouped Summary Tables — Choosing Categories for Totals and Counts
- Key-Based Lookup Formulas — Joining Targets and Reference Lists to Records
- Conditional Totals and Counts — Answering Filtered Questions Without Copies
- Reconciliation Checks — Proving Summary Figures Match Source Totals
- Named Ranges and Structured References — Keeping Formulas Readable for Colleagues

Day 3: Chart Selection and Formatting

- Comparison, Trend and Composition Charts — Matching Form to the Reader's Question
- Axis, Scale and Label Choices — Avoiding Charts That Mislead the Eye
- Colour and Emphasis Rules — Highlighting One Series Against Context
- Small Multiples and In-Cell Mini Charts — Showing Many Units in Little Space
- Conditional Formatting Rules — Drawing Attention to Exceptions in Tables

Day 4: Trend and Variance Analysis

- Period-on-Period Change — Reading Growth and Decline Correctly
- Moving Averages and Seasonal Comparison — Separating Direction from Monthly Noise
- Actual Versus Target Variance — Explaining Gaps by Volume, Price and Mix
- Simple Linear Trend Lines — Projecting the Next Periods with Stated Caution
- Outlier Flags and Threshold Rules — Deciding Which Movements Need Comment

Day 5: Practising the Spreadsheet Performance Summary

- Single-Page Layout Grid — Placing Headline Figures, Charts and Notes
- Filters and Drop-Down Selectors — Letting Readers Choose Unit and Period
- Applying Reconciliation and Variance Checks — Testing the Page Before Release
- Headline and Commentary Writing — Stating the Message Each Chart Supports
- Spreadsheet Performance Summary — Completing One Business Area's Page for Review

Applying Spreadsheet Data Visualisation and Analysis After the Course

- Rebuild one recurring report on a tidy source table, adding reconciliation checks.
- Agree a chart and colour style sheet and apply it to the next monthly pack.

Spreadsheet Data Visualisation and Analysis Questions FAQ

What is spreadsheet data visualisation and analysis, and why does it matter now?

It is the practice of structuring workbook tables, summarising them and presenting the results in clear charts. It matters now because reporting cycles are shorter and readers expect the message at a glance.

Which roles gain most from spreadsheet data visualisation and analysis?

People who compile, maintain or present figures from workbooks gain most. That includes coordinators, budget officers and administrators in sectors such as retail, logistics and healthcare.

How does spreadsheet data visualisation and analysis differ from a business intelligence course?

It works entirely inside the workbook most teams already use. A business intelligence course covers data models and automated refresh; this one focuses on clean tables, sound formulas and honest charts.

What do you bring back from spreadsheet data visualisation and analysis?

You bring back a spreadsheet performance summary for one business area. It holds a tidy source table, reconciled summaries, charts and variance notes, ready to refresh next period.

Spreadsheet Data Visualisation and Analysis: The Way Forward

The spreadsheet performance summary built on the final day first informs which variances deserve comment at the next monthly review. Analysts maintain it, managers read and question it, and colleagues can reuse its table layout for other units. After its first refresh, revisit the chart choices and thresholds, because the questions readers actually ask often differ from the ones first expected.