

Data Storytelling + Pivot Tables Workshop: Prerequisites and Curriculum



About the Boot Camp

In today's data-driven business environment, the ability to analyze information is only part of the job. Professionals must also be able to identify what matters, communicate key findings, and turn data into insights that support better business decisions.

In this hands-on workshop, participants will learn how to use Excel PivotTables to transform raw data into meaningful business insights. Students will build and customize PivotTables to summarize large datasets, compare performance, identify trends and patterns, and uncover information that may not be immediately visible in raw data.

Participants will then move beyond simply creating PivotTables to learn the fundamentals of data storytelling—determining which findings matter, selecting the right metrics to support a message, and communicating results in a way that is clear and relevant to decision-makers.

Throughout the workshop, students will work with realistic datasets from healthcare, finance, supply chain, and operations, giving them experience analyzing different types of business information and answering real-world questions with data.

By the end of the workshop, students will be able to move from raw Excel data to a structured analysis and use their findings to tell a clear, data-driven business story.

Key Takeaways

- Create and customize Excel PivotTables to analyze business data
- Summarize data using totals, averages, counts, percentages, and other calculations
- Sort, filter, group, and explore data to answer business questions
- Use slicers to create interactive views of PivotTable data
- Identify important trends, patterns, comparisons, and outliers
- Determine which metrics and findings are most relevant to the business question
- Translate analysis into meaningful business insights and recommendations
- Practice data storytelling through multiple hands-on activities and four business datasets

Prerequisites

Office 365

Creating new worksheets

Hiding worksheets

Deleting worksheets

Locating a cell

Data entry (inputting data into a cell)

Know the difference between columns and rows

Copying and pasting data

Opening a workbook

Know the difference between a workbook vs. worksheet

Saving a workbook

Inserting and deleting rows and columns

Prerequisites (Cont.)

Filtering

Sorting

Formatting (Font, borders, alignments, data types)

Mathematical operations and calculations

Sum

Average

Min

Max

Count

Addition

Subtraction

Division

Multiplication

