

EXCEL AND POWER BI

practical workplace training with real data

Microsoft Excel | Power Point | Power BI |
ChartGPT | Copilot | Google Sheets |
google forms | Canva | Appsheet | Zoom





Executive Summary

The Excel and Power BI class is a practical program designed to help executives, managers, and organizational leaders improve decision-making, reporting, operational efficiency, and performance management through data-driven leadership.

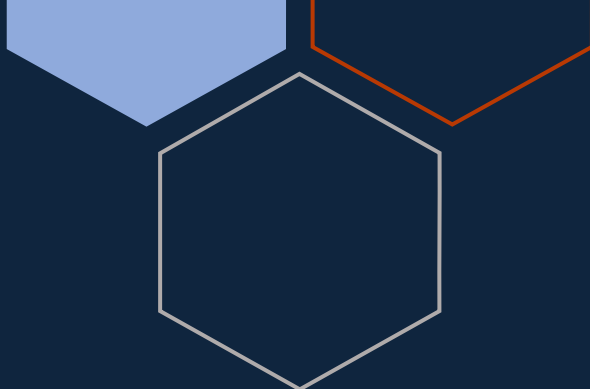
Participants will gain hands-on skills in data analysis, dashboard reporting, forecasting, financial analysis, and AI-assisted productivity using tools such as Microsoft Excel, Microsoft Power BI, Power Point, ChatGPT, and Microsoft Copilot.

The training focuses on practical application to help organizations improve reporting speed, accountability, productivity, and strategic decision-making.

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TRAINING APPROACH

- 100% Practical & Hands-On
- Real Organizational Scenarios
- Executive Dashboards
- Case Studies & Group Exercises
- AI + Excel + Power BI Integration
- Templates & Reporting Tools Included
- Action Plans for Immediate Workplace Application



TRAINING METHODOLOGY



The training will be highly interactive and practical, incorporating:

- Real-life government and donor-funded case studies
- Group exercises and presentations
- Proposal writing workshops
- Project planning simulations
- Practical reporting sessions
- Monitoring & Evaluation exercises
- Water and sanitation sector examples
- Hands-on donor engagement scenarios

COURSE OUTLINE

- Module 1: Executive Decision-Making & Strategic Thinking
- Module 2: Advanced Excel for Executives & Managers
- Module 3: Data Analysis & Business Intelligence
- Module 4: Power BI for Executive Dashboards
- Module 5: AI for Executive Productivity & Smart Work
- Module 6: Financial & Operational Performance Analysis
- Module 7: Project, Operations & Performance Management
- Module 8: Predictive Analytics & Forecasting
- Module 9: Executive Reporting & Data Storytelling
- Module 10: Capstone Executive Project





MODULE 1 — EXECUTIVE DECISION-MAKING & STRATEGIC THINKING

Objective

- Help leaders make faster, smarter, and evidence-based decisions.

Key Topics

- Data-driven leadership
- Strategic thinking frameworks
- Decision-making under uncertainty
- KPI-driven management
- Problem-solving models
- Executive performance monitoring
- Risk-based decision making

Practical Exercises

- Organizational problem analysis
- Decision simulation workshop
- KPI evaluation exercise

Organizational Impact

- Faster executive decisions
- Improved accountability
- Better strategic alignment



MODULE 2 — ADVANCED EXCEL FOR EXECUTIVES & MANAGERS

Objective

- Enable participants to use Excel as a strategic business intelligence tool.

Key Topics

- Advanced formulas for management reporting
- XLOOKUP, INDEX-MATCH, SUMIFS
- Dynamic dashboards
- PivotTables & PivotCharts
- Conditional formatting for executive alerts
- Data validation & control
- Financial & operational reporting

Practical Exercises

- Build an executive dashboard
- Automated monthly reporting
- Departmental performance tracker

Organizational Impact

- Reduce reporting time
- Improve reporting accuracy
- Enhance management visibility



MODULE 3 – DATA ANALYSIS & BUSINESS INTELLIGENCE

Objective

- Teach organizational leaders how to transform raw data into actionable insights.

Key Topics

- Data cleaning & transformation
- Power Query fundamentals
- Business intelligence concepts
- Trend analysis
- Root cause analysis
- KPI interpretation
- Performance measurement systems

Practical Exercises

- Cleaning messy company data
- Building automated reports
- Trend & variance analysis

Organizational Impact

- Better operational visibility
- Improved forecasting
- Increased analytical capacity



MODULE 4 — POWER BI FOR EXECUTIVE DASHBOARDS

Objective

- Build interactive dashboards for real-time organizational monitoring.

Key Topics

- Connecting Power BI to Excel data
- Data modeling
- Dashboard design principles
- Interactive KPI dashboards
- Financial dashboards
- Operational dashboards
- Mobile dashboard reporting

Practical Exercises

- Build a live executive dashboard
- Create departmental scorecards
- Build management performance reports

Organizational Impact

- Real-time business monitoring
- Executive-level visibility
- Faster reporting cycles



MODULE 5 – AI FOR EXECUTIVE PRODUCTIVITY & SMART WORK

Objective

- Help leaders use AI tools to improve productivity and decision-making.

Key Topics

- AI tools for executives
- AI-assisted reporting
- AI for presentations & communication
- AI for data analysis
- Smart prompt engineering
- AI for strategic planning
- Ethical AI use in organizations

Practical Exercises

- AI-generated executive reports
- AI-assisted business analysis
- AI presentation creation
- AI workflow automation

Organizational Impact

- Save hours of work weekly
- Faster communication
- Improved reporting quality



MODULE 6 – FINANCIAL & OPERATIONAL PERFORMANCE ANALYSIS

Objective

- Strengthen organizational financial and operational decision-making.

Key Topics

- Budget analysis
- Cost control techniques
- Financial performance indicators
- Operational efficiency analysis
- Variance analysis
- Forecasting & projections
- Scenario & sensitivity analysis

Practical Exercises

- Budget variance analysis
- Cost reduction exercise
- Operational performance review

Organizational Impact

- Better resource allocation
- Improved profitability
- Reduced operational waste



MODULE 7 – PROJECT, OPERATIONS & PERFORMANCE MANAGEMENT

Objective

- Improve organizational execution and operational accountability.

Key Topics

- Project tracking systems
- Performance scorecards
- Operational workflow mapping
- Team productivity tracking
- Resource utilization
- Service delivery monitoring
- Action plan management

Practical Exercises

- Build project tracking templates
- Develop departmental scorecards
- Process improvement exercise

Organizational Impact

- Better execution discipline
- Increased productivity
- Improved operational coordination



MODULE 8 — PREDICTIVE ANALYTICS & FORECASTING

Objective

- Help leaders anticipate future trends and risks using business data.

Key Topics

- Forecasting methods
- Trend analysis
- Predictive thinking
- Business scenario modeling
- Demand forecasting
- Revenue forecasting
- Risk forecasting

Practical Exercises

- Forecast sales trends
- Predict operational demand
- Build forecasting models

Organizational Impact

- Better future planning
- Improved budgeting
- Reduced organizational risk



MODULE 9 — EXECUTIVE REPORTING & DATA STORYTELLING

Objective

- Teach participants how to communicate insights effectively to stakeholders.

Key Topics

- Executive report writing
- Dashboard storytelling
- Visual presentation of data
- Executive presentation techniques
- Board reporting
- Management summaries
- Decision-support reporting

Practical Exercises

- Build executive presentations
- Create board-level reports
- Data storytelling workshop

Organizational Impact

- Better leadership communication
- Improved stakeholder engagement
- Stronger decision support

MODULE 8: CAPSTONE PRACTICAL PROJECT

Participants will work on a real organizational case study to build:

Executive Dashboard
KPI Monitoring System
Financial Analysis Model
Automated Reporting Tool
AI Productivity Workflow
Strategic Action Plan

Final Presentation

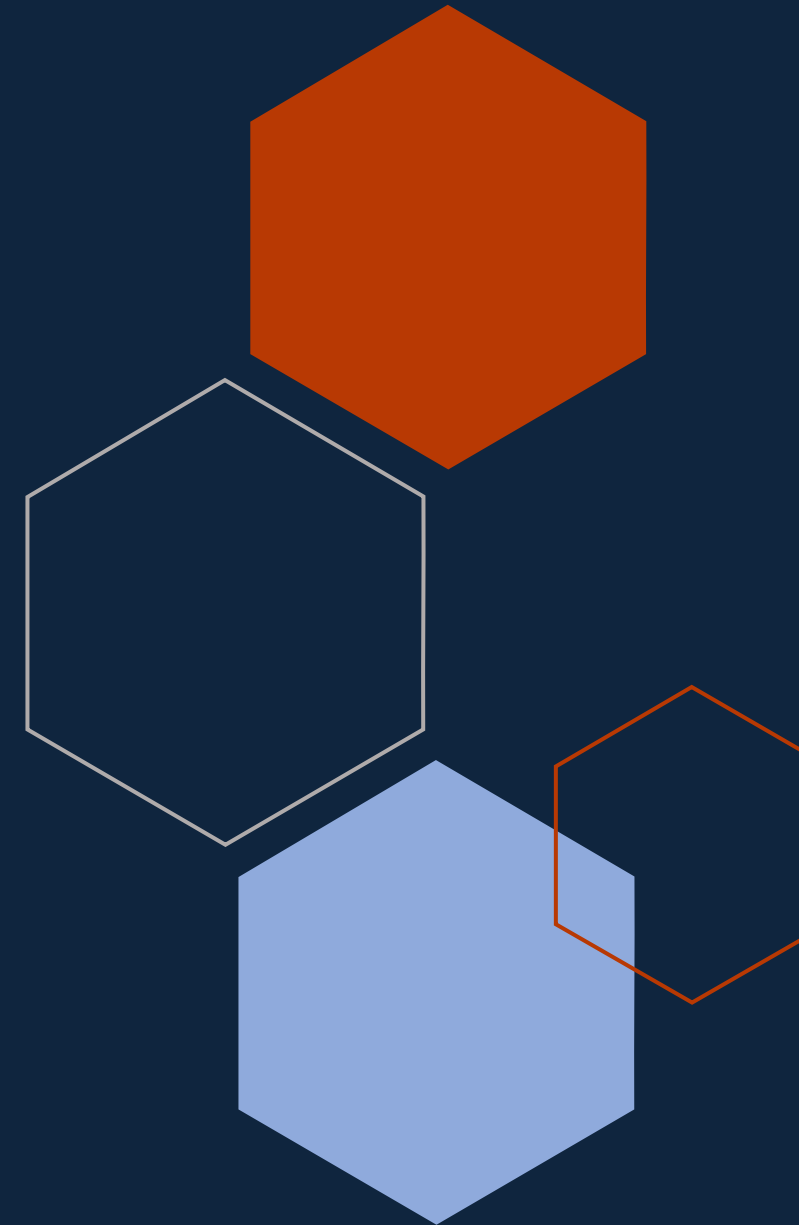
- Participants will present their projects for evaluation and expert feedback.



EXPECTED TRAINING OUTCOMES

By the end of the training, participants will be able to:

- Faster executive reporting
- Improved decision-making quality
- Better operational visibility
- Increased productivity
- Reduced manual reporting
- Improved financial oversight
- Enhanced forecasting capabilities
- Stronger accountability systems
- AI-enabled workplace efficiency
- Better strategic execution



TRAINING DELIVERABLES

- ✓ Training Manual
- ✓ Executive Dashboard Templates
- ✓ Financial Analysis Templates
- ✓ KPI Tracking Tools
- ✓ AI Prompt Library
- ✓ Power BI Dashboard Files
- ✓ Practical Exercises & Case Studies
- ✓ Certificate of Completion





Strategic Value to the Organization & Participants

This program goes beyond traditional training by helping organizations build real systems for:

- Data-driven leadership
- Performance management
- Predictive decision-making
- Reporting automation
- Executive intelligence
- Operational excellence

The result is a more agile, informed, productive, and competitive organization.



Participants investment snapshot

Module	Status	Fee (ZMW)	Duration
Module 1: Executive Decision-Making & Strategic Thinking	Compulsory	K1,000	3 Sessions Maximum 2 hours
Module 2: Advanced Excel for Executives & Managers	Compulsory	K1,000	3 Sessions Maximum 2 hours
Module 3: Data Analysis & Business Intelligence	Compulsory	K1,000	3 Sessions Maximum 2 hours
Module 4: Power BI for Executive Dashboards	Compulsory	K1,000	3 Sessions Maximum 2 hours
Module 5: AI for Executive Productivity & Smart Work	Optional	K1,000	2 Sessions Maximum 2 hours
Module 6: Financial & Operational Performance Analysis	Optional	K1,000	2 Sessions Maximum 2 hours
Module 7: Project, Operations & Performance Management	Optional	K1,000	2 Sessions Maximum 2 hours
Module 8: Predictive Analytics & Forecasting	Optional	K1,000	2 Sessions Maximum 2 hours
Module 9: Executive Reporting & Data Storytelling	Optional	K1,000	2 Sessions Maximum 2 hours
Module 10: Capstone Executive Project	Optional	K1,000	1 Sessions Maximum 2 hours

Capability Statement



Facilitator Profile: Emmanuel Nyirongo

Financial Analyst | Data & Decision Intelligence Consultant | Capacity Development Specialist

Emmanuel Nyirongo is a highly experienced Financial and Data Analytics Consultant specializing in helping organizations transform raw data into structured intelligence that drives performance, operational efficiency, and strategic decision-making. He has worked across multiple African markets — including Zambia, Zimbabwe, Malawi, and Rwanda — supporting corporate, financial, and development-sector institutions to strengthen data environments, improve reporting systems, and build data-driven decision cultures. Emmanuel's expertise spans advanced data analytics, financial modeling, performance measurement systems, predictive forecasting, inventory and supply chain analytics, and enterprise data reporting. His work focuses on solving real organizational problems by helping teams move beyond basic reporting toward predictive and insight-driven decision support using structured data systems and advanced analytics methodologies.

During his time at mPharma, Emmanuel played a critical role in analyzing pharmaceutical supply chain data across Southern Africa, monitoring key performance indicators, supporting inventory optimization strategies, and improving forecasting accuracy across multi-country distribution networks. His work strengthened data visibility, improved stock planning accuracy, and enhanced operational performance across healthcare supply chains. At Hut to Hut, Emmanuel led initiatives focused on financial modeling, demand planning, cost optimization, and operational data analytics — supporting procurement planning, inventory optimization, and financial performance monitoring. His experience at IPSOS Zambia and Paycode further strengthened his expertise in data quality management, enterprise reporting systems, and managing high-volume operational datasets with strong accuracy and governance standards.

In addition to his consulting and analytics career, Emmanuel is a highly sought-after Training Consultant who has delivered practical, hands-on data and analytics capacity development programs for organizations such as ZANIS, ZNBC, CAMFED, PACT, and other corporate and development partners. His training approach focuses on real business scenarios, system-focused learning, and practical data problem-solving — enabling participants to apply learning immediately within their operational environments.

With over a decade of experience across financial analytics, forecasting, and operational data systems, Emmanuel brings a unique combination of technical expertise and business strategy understanding. His ability to translate complex data concepts into practical business applications makes him well suited to facilitate advanced programs focused on data systems, predictive analytics, and AI-enabled decision support, where participants learn to structure data environments, analyse trends, build forecasting models, and generate insights that support high-impact organizational decisions.





Thank you

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