MAWA EVENTS

Address: No. 857, Block A2. Leisure Commerce Square - No 9., 46150 Petaling Jaya, Selangor, Malaysia

Phone: +601116373203 | **Email:** info@mawaevents.net

CFO EXCEL DASHBOARD & REPORTING

"Transform financial data into actionable insights for strategic decision-making"

Schedule

Date	Venue	Fees (Face-to-Face)
03 – 07 Aug 2026	Dubai, UAE	USD 3495 per delegate

► **Available delivery methods:** Face-to-Face & Online Training

Introduction

In today's fast-paced business environment, CFOs and finance professionals need more than just accounting skills—they need the ability to transform data into insights that drive strategic decisions. Excel dashboards and advanced reporting techniques provide a powerful toolset to analyze financial performance, monitor key metrics, and communicate insights effectively to stakeholders.

This intensive five-day training program equips participants with advanced Excel techniques, dashboard creation skills, and reporting best practices. Participants will learn to build dynamic dashboards, perform complex financial analysis, automate reports, and enhance decision-making capabilities at the executive level.

Objectives

By the end of this course, participants will be able to:

- Design and build interactive Excel dashboards for financial reporting
- Automate financial reports for accuracy and efficiency
- Analyze financial data using advanced Excel functions and formulas
- Monitor KPIs and business performance through visual dashboards
- Apply best practices in data visualization and executive reporting
- Integrate Excel dashboards with other financial systems
- Improve data-driven decision-making at strategic and operational levels

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Why Attend

- Learn to convert raw financial data into meaningful insights
- Improve efficiency in financial reporting and monitoring
- Gain hands-on skills in creating visually compelling dashboards
- Enhance decision-making with accurate, real-time data
- Reduce errors and manual efforts in reporting
- Network with peers and share practical experiences

Target Audience

This program is designed for:

- CFOs, finance managers, and financial analysts
- Accounting and reporting professionals
- Business controllers and planning officers
- Corporate finance teams responsible for management reporting
- Professionals looking to enhance Excel and dashboard skills

Individual Benefits

Key competencies that will be developed include:

- Mastery of advanced Excel functions, formulas, and pivot tables
- Ability to create dynamic and interactive dashboards
- Expertise in data visualization for financial and operational metrics
- Improved analytical and problem-solving skills
- Enhanced efficiency in reporting and data management
- Capability to automate recurring financial reports

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved reporting accuracy and efficiency
- Enhanced visibility of key business metrics
- Data-driven decision-making at the executive level
- Streamlined financial reporting processes
- Reduced reliance on manual calculations and repetitive tasks
- Stronger alignment of finance function with strategic objectives

Instructional Methodology

The course follows a blended learning approach combining theory with practice:

- Strategy Briefings – Overview of dashboard concepts, reporting frameworks, and Excel best practices
- Case Studies – Real-world examples of CFO dashboards and reporting challenges
- Workshops – Hands-on exercises to build interactive dashboards and automate reports
- Peer Exchange – Group discussions on reporting practices and performance metrics
- Tools – Excel templates, macros, and dashboard frameworks for practical application

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Course Outline

Detailed 5-Day Course Outline

Training Hours: 7:30 AM – 3:30 PM Daily Format: 3–4 Learning Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Introduction to CFO Dashboards and Reporting

Module 1: Financial Reporting Overview (07:30 – 09:30)

- Role of dashboards in CFO decision-making
- Reporting requirements for finance teams
- Key metrics and KPIs for executive reporting

Module 2: Excel Fundamentals for Dashboarding (09:45 – 11:15)

- Advanced formulas and functions
- Data organization and best practices

Module 3: Data Cleaning and Preparation (11:30 – 01:00)

- Handling large datasets
- Using tables, named ranges, and data validation

Module 4: Workshop – Setting up Data Models (02:00 – 03:30)

- Hands-on practice in preparing datasets for dashboards

Day 2: Advanced Excel Techniques

Module 1: Pivot Tables and Pivot Charts (07:30 – 09:30)

- Creating pivot tables for financial analysis
- Pivot charts for visual insights

Module 2: Advanced Formulas and Functions (09:45 – 11:15)

- Logical, lookup, and aggregation functions
- Nested formulas for complex calculations

Module 3: Conditional Formatting and Alerts (11:30 – 01:00)

- Highlighting key trends and anomalies
- Automated alerting for performance thresholds

Module 4: Workshop – Formula Applications (02:00 – 03:30)

- Hands-on exercises to apply advanced Excel functions

Day 3: Dashboard Design Principles

Module 1: Dashboard Layout and Structure (07:30 – 09:30)

- Planning a dashboard for CFO reporting
- Selecting KPIs and metrics

Module 2: Data Visualization Techniques (09:45 – 11:15)

- Charts, graphs, and interactive elements
- Using sparklines, conditional icons, and gauges

Module 3: Dynamic Dashboard Features (11:30 – 01:00)

- Drop-downs, slicers, and filters
- Linking multiple sheets and datasets

Module 4: Workshop – Building a Basic Dashboard (02:00 – 03:30)

- Hands-on creation of a functional CFO dashboard

Day 4: Automation and Reporting Efficiency

Module 1: Introduction to Macros and VBA (07:30 – 09:30)

- Automating repetitive tasks
- Recording and editing macros

Module 2: Integrating External Data (09:45 – 11:15)

- Importing data from ERP, accounting, and other systems
- Refreshing dashboards automatically

Module 3: Advanced Reporting Techniques (11:30 – 01:00)

- Linking dashboards to reporting packs
- Scenario analysis and what-if modeling

Module 4: Workshop – Automating Reports (02:00 – 03:30)

- Hands-on exercises for automated reporting

Day 5: Advanced Dashboard Projects and Review

Module 1: KPI Monitoring and Executive Insights (07:30 – 09:30)

- Designing dashboards for strategic decision-making
- Tracking financial and operational performance

Module 2: Dashboard Optimization and Best Practices (09:45 – 11:15)

- Improving usability and clarity
- Avoiding common dashboard mistakes

Module 3: Project Work and Peer Review (11:30 – 01:00)

- Creating a complete CFO dashboard from scratch
- Group discussion and feedback

Module 4: Workshop & Course Wrap-Up (02:00 – 03:30)

- Final dashboard project presentation
- Q&A, review, and best practice discussion

Certification

Participants will receive a Certificate of Completion in CFO Excel Dashboard & Reporting, validating their advanced skills in Excel dashboard creation, financial reporting, automation, and data-driven decision-making.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation’s unique goals.

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