



Mastering Business Insights through Dynamic Dashboard Reporting

September 17, 2024, and 20, 2024, with a 4-hour session scheduled for each day

Online Master Training Course



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Course Overview

Discover the transformative potential of dynamic dashboard reporting with our comprehensive training course. Gain invaluable insights into leveraging effective dashboard metrics to drive informed decision-making and propel your business to new heights. Whether you're a novice or seeking to refine your data-driven skills, this course will equip you with the tools to unlock the true power of data visualization. Prepare to make more informed decisions, improve business performance, and confidently achieve your strategic objectives.

Class size is limited to encourage participation and increased collaboration. Register early to secure your spot!

Learning Outcomes

The Dynamic Dashboard Reporting Master Training Course equips participants with essential skills and knowledge to utilize dashboard reporting effectively. After completing the course, participants can expect to:

- **Understand Dashboard Reporting:** Gain insight into the purpose and significance of dashboard reporting in data-driven decision-making.
- **Proficient Dashboard Design:** Use data visualization principles to create tailored, visually appealing dashboards for specific audiences.

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Learning Outcomes (continued)

- **Data Collection and Preparation:** Acquire the ability to collect, integrate, and clean data from diverse sources to ensure reliability
- **Tool and Tech Familiarity:** Learn about popular dashboard tools and data visualization libraries for reporting needs.
- **Interactive Visualization Expertise:** Develop skills in creating engaging, interactive visualizations.
- **Custom KPI and Metric Development:** Define customized key performance indicators and metrics aligned with organizational goals.
- **Best Practices in Dashboard Reporting:** Apply data accuracy and clarity to best practices.
- **Real-Time and Automated Dashboard Setup:** Set up and maintain real-time and automated dashboards.
- **Data Storytelling and Narrative:** Communicate data-driven insights effectively through storytelling.
- **Dashboard Deployment and User Training:** Plan and execute dashboard deployment, including user training and access management.
- **Dashboard Maintenance and Monitoring:** Develop skills to ensure dashboards' continued relevance and accuracy.
- **Practical Application:** Analyze real-world dashboard examples, build sample dashboards, and engage in group exercises to address challenges.
- **Promote a Data-Driven Culture:** Encourage a data-driven culture within the organization.
- **Resources and Continued Learning:** Participants will receive references for ongoing growth, keeping them updated with dashboard reporting techniques and technologies.

This Master course empowers participants to transform data into actionable insights, enhancing their value in data-driven decision-making and business optimization.





Mastering Business Insights Through Dynamic Dashboard Reporting

Agenda: Tuesday, September 17, 2024

10:15 EDT	Attendees Login
10:30 EDT	Welcome and Course Kickoff
12:00 EDT	Lunch Break
1:00 EDT	Course Resumes
3:30 EDT	End of Day 1

Agenda: Day One Content

- 1. Introduction to Dashboard Reporting**
 - a. Definition and purpose of dashboard reporting
 - b. Benefits of using dashboard reporting for business tracking
 - c. Understanding key performance indicators (KPIs) and metrics
- 2. Designing Effective Dashboards**
 - a. Identifying the target audience and their information needs
 - b. Principles of data visualization and dashboard design
 - c. Selecting the right type of dashboard for different reporting scenarios
 - d. Best practices for organizing and structuring dashboard elements
- 3. Data Collection and Preparation**
 - a. Data sources and integration
 - b. Data quality and data cleaning
 - c. Handling and transforming raw data into actionable insights
 - d. Dealing with data privacy and security concerns
- 4. Dashboard Tools and Technologies**
 - a. Overview of popular dashboard tools (e.g., Tableau, Power BI, Google Data Studio)
 - b. Introduction to data visualization libraries (e.g., D3.js, Plotly)
 - c. Understanding the technical requirements and constraints of dashboard development



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Agenda: Day One Content (continued)

5. Creating Interactive Visualizations

- Understanding different types of charts and graphs
- Designing interactive elements for better user engagement
- Adding filters, slicers, and drill-down options

6. Building Customized KPIs and Metrics

- Defining relevant KPIs for specific business objectives
- Developing custom metrics to track unique business processes
- Aligning KPIs with organizational goals





Mastering Business Insights Through Dynamic Dashboard Reporting

Agenda: Friday, September 20, 2024

10:15 EDT	Attendees Login
10:30 EDT	Course Continues, Day Two
12:00 EDT	Lunch Break
1:00 EDT	Course Resumes
3:30 EDT	Course Concludes

Agenda Day Two Content

- 7. Dashboard Reporting Best Practices**
 - a. Ensuring data accuracy and reliability
 - b. Maintaining consistency and clarity in dashboard design
 - c. Addressing common dashboard reporting challenges
 - d. Incorporating feedback and continuous improvement
- 8. Real-Time and Automated Dashboards**
 - a. Exploring real-time data integration and reporting
 - b. Automating data updates and refreshes
 - c. Benefits and considerations of real-time dashboards
- 9. Data Storytelling and Narrative**
 - a. Communicating insights effectively through storytelling
 - b. Presenting data-driven narratives to influence decision-making
 - c. Engaging stakeholders through compelling data stories
- 10. Dashboard Deployment and User Training**
 - a. Planning for dashboard deployment and access
 - b. Training users on dashboard navigation and interpretation
 - c. Managing user access and permissions



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Agenda: Day Two Content (continued)

11. Dashboard Maintenance and Monitoring

- a. Monitoring data sources and data refresh schedules
- b. Handling dashboard performance issues and optimization
- c. Performing periodic updates and improvements

12. Case Studies and Practical Exercises

- a. Analyzing real-world dashboard examples
- b. Building sample dashboards to track business reporting
- c. Group exercises and discussions on dashboard challenges

13. Conclusion and Next Steps

- a. Recap of key concepts and takeaways
- b. Encouraging a data-driven culture within the organization
- c. Resources and references for further learning and growth





Mastering Business Insights Through Dynamic Dashboard Reporting

Co-Instructor

Shane McDonald

President

Retail Energy Consulting LLC

Shane McDonald has over 25 years of diverse experience spanning various industries, including Energy, Financial Services, Card Services, Telecom, and System Software Development. expertise encompasses a range of critical areas, including Customer Lifecycle Transformation, Risk Management, Process Design and Control, Data Analytics and Reporting, IT Network Infrastructure, and Cyber Security. Also have played pivotal roles in Software Development Lifecycle, Digital Transformation, Leadership, and Team Building.



Throughout his career, he has consistently demonstrated a keen focus on customer experience and profitability and has an impressive proven track record of spearheading technology-centric operations, leading strategic initiatives to drive growth, enhance operational scalability, and boost profitability. Notably, they are recognized for their ability to build high-performing and innovative teams dedicated to elevating customer satisfaction. Notably, he is recognized for his ability to build high-performing and innovative teams dedicated to elevating customer satisfaction.



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Co-Instructor

Julio Montenegro Lacayo

Data Analyst Manager

Retail Energy Consulting LLC

As an experienced Data Analyst Manager with over a decade of expertise, I specialize in steering data-driven initiatives to enhance business performance. My background encompasses internal and external analytics, where I've successfully led teams to extract actionable insights from complex datasets. Emphasizing a strategic focus on key performance indicators (KPIs), I've empowered executive decision-making and cultivated a culture of data-driven excellence.



My proficiency extends to crafting and executing impactful analytics strategies, with strength in communicating nuanced insights to diverse audiences, from front-line teams to C-level executives. I excel in constructing visually engaging dashboards and presentations that facilitate informed decision-making across all organizational levels.

Beyond managing internal data analytics teams, I've forged collaborations with external stakeholders to align data strategies with overarching business goals. This collaborative approach ensures that data insights not only fulfill internal objectives but also resonate with external partners and clients.





Mastering Business Insights Through Dynamic Dashboard Reporting

Who Should Attend

The Dynamic Dashboard Reporting Master Training Course is designed for a wide range of individuals who want to enhance their data-driven decision-making skills. The target audience for this course includes:

Business Professionals: Individuals working in marketing, finance, sales, and operations. Business professionals can use dashboard reporting to track key performance indicators (KPIs) and make informed decisions to improve their department's performance.

Analysts: Data analysts and business analysts can benefit from this course to develop skills in designing, creating, and maintaining effective dashboards that provide insights from data. These skills are valuable for supporting data-driven decision-making within an organization.

Managers: Managers at different levels of an organization can attend this course to gain a deeper understanding of dashboard reporting. This knowledge will help them monitor team and department performance, track progress toward goals, and make data-informed decisions to improve business outcomes.

Data Enthusiasts: Individuals with a strong interest in data and a desire to explore its potential can use this course to develop expertise in dashboard reporting. Whether you're a data hobbyist or looking to pivot into a data-related career, this course provides a strong foundation.

Anyone Interested in Data-Driven Decision-Making: This course is suitable for anyone who wants to harness the power of data through dashboard metrics, even if they have no prior experience with data analysis or visualization. It accommodates beginners and individuals looking to enhance their skills.

The Dynamic Dashboard Reporting Master Training Course is versatile and intended for a diverse audience, ranging from beginners to experienced professionals. It equips participants with the knowledge and skills to effectively utilize dashboard reporting to make informed decisions and optimize business performance.



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Course Requirements

1. Basic computer skills
2. Access to a computer with Internet connectivity
3. Familiarity with spreadsheet software (e.g., Microsoft Excel)
4. Eagerness to learn and explore data-driven decision-making

Online Delivery

In our upcoming online course, we've chosen Microsoft Teams as the platform for your seamless participation. You don't need an existing Teams account to join the action. You'll be able to view the course directly in your web browser. During the sessions, you can communicate with the instructor and fellow participants by using your microphone to ask questions or typing them into the chat window.

For an enhanced experience, we recommend [downloading and installing the Teams App](#) if available. Alternatively, you can use either the Edge browser or Chrome for access. We'll send you a separate email with a unique link to a personalized landing page. This landing page will give you easy access to all the event sessions.

Our remote meeting connection will become available roughly 30 minutes before the course begins. We encourage you to log in as early as possible in case any unexpected technical issues arise. Your seamless online learning experience is our top priority!



Instructional Methods

Case studies, PowerPoint presentations and classroom exercises will be used





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Registration Instructions and Fees

Single Registration: \$995.

1. Register now using the [ONLINE REGISTRATION FORM](#) here or on the website.
 2. Or you may call us at 843-277-1620.
- **Team discounts** are available. Explore team discounts on our [WEBSITE](#) and the online registration form or you can contact us at 843-277-1620.
 - A PDF version of the [REGISTRATION FORM](#) is available for download. Please email the form to marilynn@conferencesbymonticello.com
 - Payments accepted include VISA, MasterCard, American Express, Discover, PayPal

Substitutions and Cancellations

Cancellation Policy: If you need to cancel, please submit your request in writing by Thursday, January 25, 2024, to be eligible for a refund. Please note that a \$95 administration fee will be deducted from your refund. You can transfer your registration to another member within your company. Conferences By Monticello's liability is limited to the refund of the registration fee only. For further assistance or inquiries, please don't hesitate to contact us at 843-277-1620.





Conferences and Learning Courses for Utility Professionals

Monticello's Utility Industry Events: Where Knowledge Meets Opportunity!

Discover a world of insights and connections with Monticello's premier conferences and events exclusively designed for the utility industry. With years of industry expertise, we create events that provide a unique blend of learning and networking opportunities.

Why Choose Us:

Valuable Insights: Benefit from our extensive knowledge of the utility industry.

Inclusive Gatherings: Join a diverse community of industry professionals, vendors, and suppliers.

Networking Excellence: Forge meaningful connections that transcend the utility spectrum.

Don't miss out on our upcoming live events and online learning courses. Register now and be a part of the utility industry's most empowering conferences.

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