Bringing Financial Reports Alive in Excel with Visualisation

EXPLORING THE JOURNEY FROM RAW DATA TO ACTIONABLE INSIGHTS.

Lunch and Learn series

John Tennent

Lunch & Learn – The Series

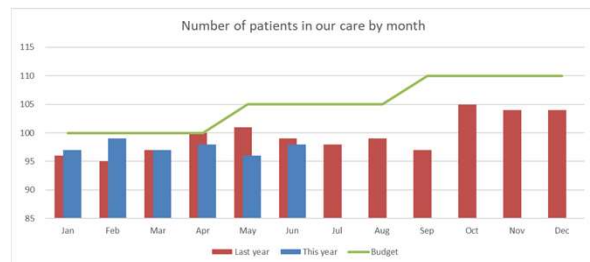|	
12 Sep	Introduction
11 Oct	Charting Monthly Results
15 Nov	Waterfall Charts
12 Dec	Speedometers
9 Jan	Building the Report

12:30 to 13:00
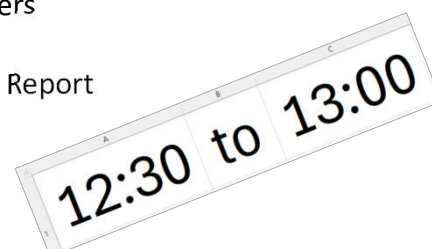
Bringing numbers alive visually

1911 Arthur Brisbane said "**Use a picture. It's worth a thousand words**"…

Excel has Charts (or is it graphs?):

- A chart is a graphic representation of data
- A graph is a diagram of a mathematical function

Ehrenberg 's view of a chart: "a means of making results clear and memorable though not good for communicating quantitative details or complex story-lines. A chart should be easy on the eye and the message it portrays should be capable of being summarised in a sentence".

Also said – use a maximum of three colours

Content

- Plotting line charts with quick charts
- Making lines hang where data does not exist
- Dual axis charts
- Column charts
- Mixing chart types
- Left or right overlapping
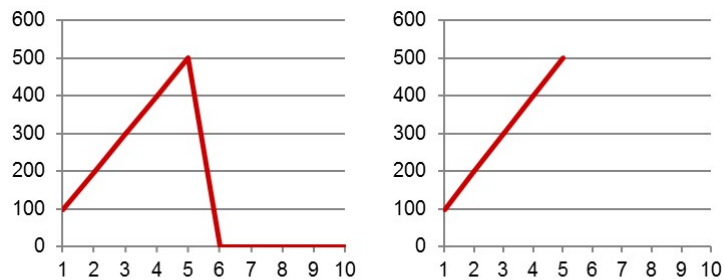- Picture elements
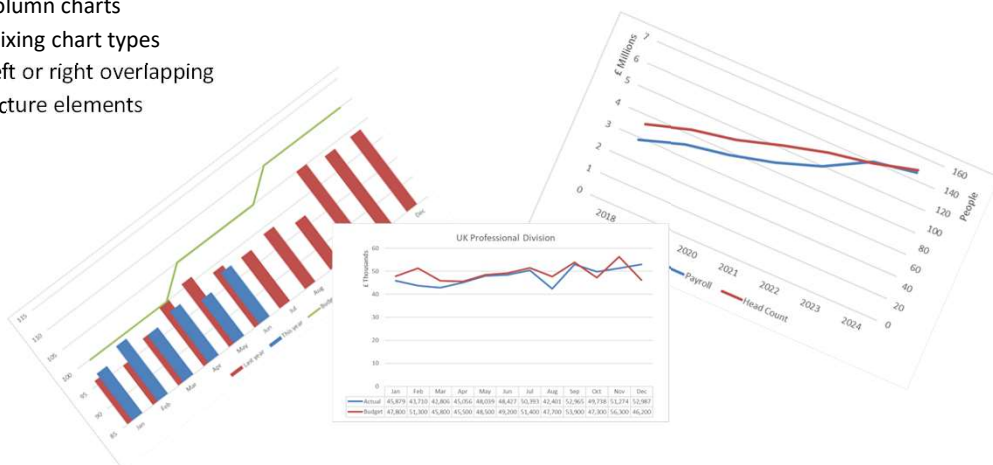
Plotting charts and graphical features

- Plotting a line chart
- Chart title – direct / linked
- On / between markers
- Display units (thousands)
- Change colour order
- Add data table

UK Professional Division

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Actual	45,879	43,710	42,806	45,056	48,039	48,427	50,393	42,401	52,965	49,738	51,274	52,987
Budget	47,800	51,300	45,800	45,500	48,500	49,200	51,400	47,700	53,900	47,300	56,300	46,200

Graphing of values including using NA()

=NA() no value available – stop graphs dropping to zero
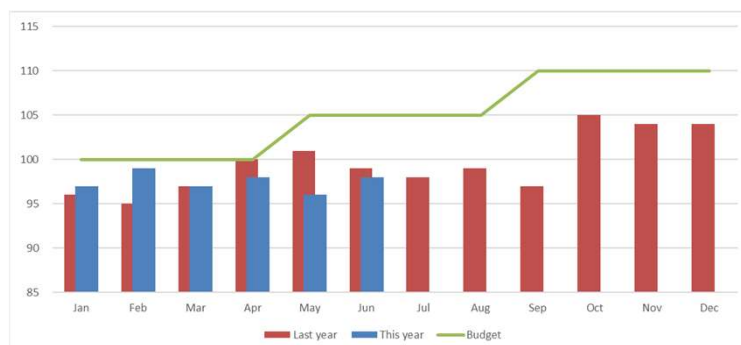
Dual axis enables correlation

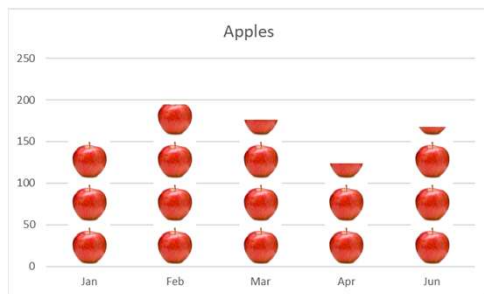Dual axis enables data of different ranges to mapped onto each other
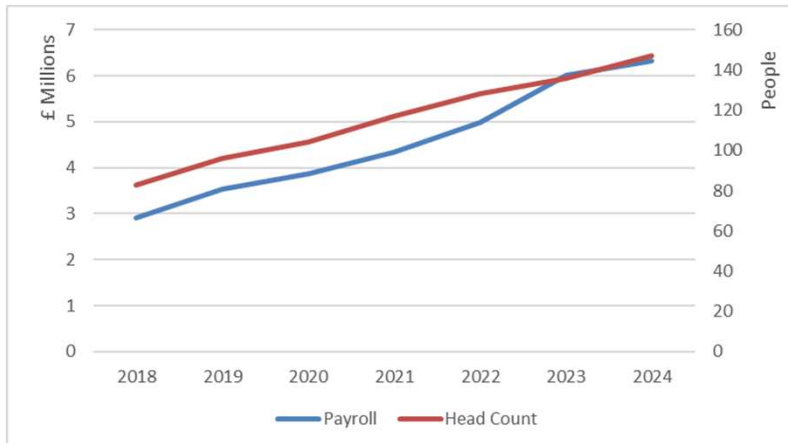
Column Chart

Column cart with overlap enables data to be grouped. A separate line chart enables the data to be displayed clearly.

Left or right overlap? - format horizontal axis and click 'Categories in reverse order'

Picture fill

You can insert pictures into your column charts to make them more illustrative

Questions

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