



# *Bringing Financial Reports Alive in Excel with Visualisation*

EXPLORING THE JOURNEY FROM RAW DATA TO ACTIONABLE INSIGHTS.

Lunch and Learn series

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## Lunch & Learn – The Series



12 Sep

Introduction

11 Oct

Charting Monthly Results

15 Nov

Waterfall Charts

12 Dec

Speedometers

9 Jan

Building the Report



## Bringing numbers alive visually

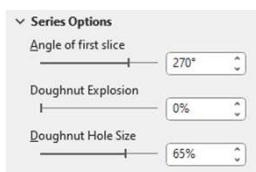
Speedometer – a visual representation of progress towards a goal

- KPIs
- Budget achievement
- Project progress



## Content

- Calculating the data
- Drawing in Excel



- Include a speech bubble as the indicator



## Commentary

- Text boxes
- Using =OFFSET to switch between months

### Fund Raising Year to date income



#### What Happened?

The decline in individual giving has accelerated with the cost of living squeeze. We lost 126 supporters in the first half of the year.

#### Actions Taken

We have scheduled a fund raising concert for September hosted by the local choral society with a target of £20,000 to make up some of the shortfall.

## Questions





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