

Excel for Project Managers

Driving Better Project Outcomes Through Data-Driven Decision Making

4-Hour Executive Project Reporting & Analysis Program

In today's business environment, project leaders are expected to provide accurate status reporting, maintain budget visibility, manage risks proactively, optimise resource utilisation, and deliver projects aligned with strategic objectives.

While enterprise project management platforms provide valuable scheduling and collaboration capabilities, Microsoft Excel remains the primary tool used by organisations for project reporting, governance, budget management, performance tracking, and executive communication.

Designed specifically for project professionals with the practical Excel skills required to transform project data into actionable insights, strengthen project governance, improve stakeholder reporting, and support informed decision-making at every stage of the project lifecycle.

Business Outcomes

Organisations investing in this programme can expect project teams to:

- Improve visibility of project performance and delivery status
- Strengthening project governance and reporting consistency
- Enhance budget, risk, and resource management processes
- Reduce manual reporting effort and administrative overhead
- Deliver more accurate and timely project information
- Improve stakeholder confidence through professional reporting
- Support faster and better-informed management decisions
- Leverage AI-powered capabilities to accelerate analysis and reporting

Target Audience

This programme is designed for professionals responsible for project delivery, governance, portfolio oversight, and business transformation, including:

- Project and Programme Managers
- PMO Leaders
- Project Coordinators
- Business Analysts
- Change Managers
- Portfolio Managers
- Operations Managers and Team Leaders

Prerequisites

Participants should have a working knowledge of Microsoft Excel, including basic formulas, worksheet navigation, and spreadsheet management.

Programme Objectives

Upon completion of this workshop participants will be able to:

- Develop professional project reporting and tracking solutions
 - Monitor project budgets, expenditure, and forecasts
 - Track project milestones, deliverables, and performance metrics
 - Manage risks, issues, and action plans more effectively
 - Analyse project information using PivotTables and visual reporting tools
 - Create executive dashboards that support strategic decision-making
 - Improve efficiency through automation and advanced Excel functionality
 - Apply Microsoft Copilot to accelerate project analysis and reporting
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Programme Content

Developing Effective Project Governance and Reporting Frameworks

Successful projects rely on accurate, structured, and accessible information.

Key Topics

- Design project workbooks that support governance and reporting requirements
- Structure project data for efficient analysis
- Improve data quality and consistency
- Create scalable project tracking solutions
- Implement effective workbook management practices

Business Outcome

Greater control, improved reporting integrity, and stronger project governance.

Monitoring Project Budgets and Financial Performance

Financial control is fundamental to successful project delivery.

Key Topics

- Track project expenditure against approved budgets
- Monitor forecast versus actual performance
- Analyse cost variances and trends
- Develop project budget reporting models

- Improve financial visibility across projects

Business Outcome

Better financial oversight and more proactive budget management.

Core Excel Skills

- SUM and SUMIFS
- SUBTOTAL
- IF and IFERROR
- Forecasting calculations
- Variance analysis techniques

Resource Planning and Performance Management

Projects succeed when resources are effectively allocated and managed.

Key Topics

- Monitor resource allocation and utilisation
- Analyse workload distribution
- Track planned versus actual effort
- Identify capacity constraints
- Improve resource planning visibility

Business Outcome

Improved resource efficiency and reduced delivery risk.

Risk, Issue and Action Management

Proactive management of risks and issues is essential for project success.

Key Topics

- Build dynamic risk and issue registers
- Automate risk scoring and prioritisation
- Track mitigation actions
- Monitor overdue activities
- Create governance-focused status reporting

Business Outcome

Earlier identification of project threats and stronger governance oversight.

Core Excel Skills

- Conditional Formatting
- Data Validation

- Date Functions
- Logical Functions

Analysing Project Performance and Delivery Metrics

Project data becomes valuable when transformed into meaningful insight.

Key Topics

- Analyse project performance indicators
- Measure progress against milestones and deliverables
- Identify trends and emerging issues
- Evaluate schedule and resource performance
- Support evidence-based decision-making

Business Outcome

Greater visibility of project health and improved management intervention.

Core Excel Skills

- PivotTables
- PivotCharts
- Slicers
- Data summarisation techniques

Consolidating and Managing Project Information

Project teams frequently work across multiple systems and data sources.

Key Topics

- Consolidate project information efficiently
- Validate and reconcile data
- Match project records across systems
- Improve reporting accuracy and consistency

Business Outcome

Reduced manual effort and enhanced reporting reliability.

Core Excel Skills

- XLOOKUP
- VLOOKUP
- INDEX and MATCH
- COUNTIFS

- Advanced lookup techniques

Executive Reporting and Project Dashboards

Leadership teams require concise and insightful reporting that supports strategic decision-making.

Key Topics

- Design executive-ready project dashboards
- Create project scorecards and KPI reports
- Develop visual reporting solutions
- Present budget, risk, schedule and resource information effectively
- Build stakeholder-focused reporting frameworks

Business Outcome

Improved communication, stronger stakeholder engagement, and more effective governance.

AI and Copilot for Project Management

Explore how AI is transforming project reporting, analysis, and decision support.

Key Topics

Participants Will Discover How To:

- Generate project summaries automatically
- Analyse project performance using natural language prompts
- Identify project trends and risks faster
- Create reports and status updates more efficiently
- Accelerate project administration and communication

Business Outcome

Increased productivity and faster access to insight.

Learning Approach

This programme combines practical instruction, real-world project scenarios, business-focused exercises, and guided workshops to ensure immediate workplace application.

Participants work with realistic project datasets covering:

- Budget management

- Milestone tracking
- Resource planning
- Risk management
- Project governance
- Executive reporting

Included with the Program

- Comprehensive course workbook
- Exercise files and datasets
- Practical project templates
- Quick reference guides
- Certificate of Completion

Delivery Options

Duration: 4 Hours

Cost: \$450+GST per person

Delivery: In-Person or Live Online

Level: Intermediate to Advanced

Class Size: Small group or private corporate delivery

Business Benefits

Enabling Project Leaders to Deliver Greater Visibility, Stronger Governance, and Better Business Outcomes Through Advanced Excel Skills.

- Build professional project management reporting solutions
- Improve visibility of project budgets, risks, and resources
- Strengthen project governance and accountability
- Analyse project information with greater confidence
- Deliver clear and compelling executive reports
- Reduce administrative overhead through automation
- Apply AI-assisted tools to enhance project performance management

Software Solutions

Empowering Project Management with Advanced Microsoft Excel Skills

Professional Microsoft Excel training designed to help organisations improve project performance, strengthen governance, and transform project data into strategic business insight.