



## FINANCIAL MODELING SERIES

# Creating Financial Dashboards: Design Principles

**COURSE LENGTH**

Three 2-Hour Virtual Sessions or  
One Full Day In Person

**DESCRIPTION**

Participants will learn dashboard design principles, development, and presentation in Excel for financial planning and analysis (FP&A) and treasury management. Specifically, the session will dive into visualization theories along with pre-attentive attributes to transform raw financial data into visually compelling and actionable dashboards. Through hands-on exercises and real-world examples, attendees will master various types of visualization created in Excel and used in the corporate setting. Moreover, user interactive elements will be incorporated into the dashboard to enable sensitivity/scenario analysis and effectively communicate financial insights to stakeholders.

**LEARNING OBJECTIVES**

- Understand financial dashboards, their components, and key financial metrics.
- Create professional Excel visualizations with interactive elements.
- Communicate financial insights effectively through well-designed dashboards.

**AGENDA**

- Financial Dashboards: Principles and Design
  - Purpose of dashboards and components of financial dashboards
  - Key metrics used in FP&A and treasury management
  - Visualization theories, pre-attentive attributes, visual mediums and techniques
- Financial Dashboards: Development and Presentation
  - Develop professional and accessible visualizations in Excel
  - Practice: Numbers and charts
  - Build user interactive elements into dashboards.
  - Prepare dashboards for effective data storytelling to stakeholders.
- Interactive Exercises on Building Financial Dashboards
  - Utilize industry-specific and company-relevant examples