MS Excel for Project Managers Training Course

Professional Development Training Course Outline

Category	Project Management	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Microsoft Excel is a critical tool for project managers seeking to streamline project planning, monitoring, and reporting. MS Excel for Project Managers Training Course equips project professionals with advanced Excel skills, including data analysis, visualization, and automation, to enhance decision-making, track progress, and optimize resource utilization. Participants will learn to leverage functions, formulas, pivot tables, dashboards, and templates to manage timelines, budgets, risks, and team performance efficiently. The training focuses on practical applications of Excel in real-world project scenarios, improving productivity, accuracy, and project outcomes.

In today's fast-paced project management environment, data-driven insights and performance tracking are essential for success. This course empowers participants to design dynamic project dashboards, automate repetitive tasks, and apply advanced analytical tools to monitor KPIs, forecast resource needs, and communicate results effectively. By mastering Excel techniques tailored for project management, learners will enhance strategic planning, strengthen stakeholder reporting, and foster a culture of operational excellence across projects.

Programme Curriculum

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Course Objectives

1. Master advanced Excel formulas and functions for project management analysis.
2. Apply conditional formatting and data validation to track project progress.
3. Use pivot tables and pivot charts to summarize project data efficiently.
4. Develop dynamic dashboards to monitor KPIs, schedules, and budgets.
5. Apply scenario analysis and forecasting for resource allocation and risk management.
6. Leverage Excel's data visualization tools to communicate project insights.
7. Utilize macros and automation to streamline repetitive project tasks.
8. Integrate project schedules with Gantt charts and task tracking templates.
9. Analyze project performance using statistical and analytical functions.
10. Manage and clean large datasets for project reporting and decision-making.
11. Collaborate effectively using shared workbooks and version control techniques.
12. Implement project cost tracking, variance analysis, and earned value metrics.
13. Build project management templates and standardized reporting dashboards.

Organizational Benefits

- Improved project planning and monitoring through data-driven insights
- Increased efficiency with automated Excel workflows
- Enhanced decision-making with accurate reporting and analysis
- Better resource allocation and risk management
- Streamlined project budget tracking and variance analysis
- Standardized reporting for consistent communication across teams
- Greater visibility into project KPIs and milestones
- Reduced errors and improved data integrity
- Empowered project teams with self-service analytical tools
- Competitive advantage through advanced project analytics

Target Audiences

- Project managers and coordinators
- Program and portfolio managers
- Project analysts and reporting officers
- PMO staff and support teams
- Business analysts and operations managers
- IT and data professionals supporting projects

- Consultants and project management trainers
- Senior management overseeing project portfolios

Course Duration: 10 days

Course Modules

Module 1: Introduction to Excel for Project Management

- Overview of Excel interface and project-specific features
- Navigating workbooks, worksheets, and ranges efficiently
- Setting up project templates for timelines and budgets
- Basic formulas for project tracking and calculation
- Introduction to data entry best practices for accuracy
- Case Study: Setting up a project tracking template for a small project

Module 2: Advanced Formulas and Functions

- Logical functions (IF, AND, OR) for project decisions
- Lookup and reference functions (VLOOKUP, HLOOKUP, INDEX, MATCH)
- Date and time functions for scheduling and timelines
- Text and string manipulation for project reporting
- Aggregation and statistical functions for project KPIs
- Case Study: Using formulas to track project milestones and deliverables

Module 3: Data Validation and Conditional Formatting

- Implementing data validation rules to prevent errors
- Creating drop-down lists for task status and priority
- Conditional formatting for milestone tracking and risk indicators
- Highlighting overdue tasks and critical paths
- Visual cues for budget overruns and schedule delays
- Case Study: Conditional formatting to flag project risks in a dashboard

Module 4: Pivot Tables and Pivot Charts

- Summarizing project data with pivot tables
- Grouping, filtering, and sorting project metrics
- Creating pivot charts for project reporting
- Using slicers and timelines to interact with data
- Analyzing multi-project portfolios efficiently
- Case Study: Generating a pivot table to summarize project expenses

Module 5: Project Dashboards and KPI Tracking

- Designing interactive dashboards for project monitoring
- Integrating charts, tables, and KPI indicators
- Linking dashboards to live project data sources
- Highlighting key metrics: schedule, cost, and performance
- Updating dashboards automatically with new data entries
- Case Study: Building a project KPI dashboard for stakeholder reporting

Module 6: Scenario Analysis and Forecasting

- Using data tables for scenario planning
- Applying goal seek and solver for project optimization
- Forecasting resource requirements and costs
- Evaluating “what-if” scenarios for risk mitigation
- Analyzing project sensitivity to schedule changes
- Case Study: Scenario analysis for resource reallocation in a complex project

Module 7: Data Visualization Techniques

- Creating charts for task progress, budget, and resource allocation
- Using combination charts for multiple KPIs
- Sparklines for quick visual summaries
- Customizing charts for clarity and presentation
- Dynamic visuals for stakeholder updates
- Case Study: Visualizing project performance across multiple teams

Module 8: Macros and Automation

- Recording and editing macros for repetitive tasks
- Automating project status updates and reports
- Using VBA basics for simple project automation
- Reducing manual errors through macro applications
- Integrating macros with dashboards and templates
- Case Study: Automating weekly project reporting process

Module 9: Gantt Charts and Task Tracking

- Creating project schedules using Excel
- Designing dynamic Gantt charts with conditional formatting
- Linking task dependencies and milestones

- Monitoring progress and delays
- Updating project timelines efficiently
- Case Study: Developing a Gantt chart for a multi-phase project

Module 10: Project Cost Tracking

- Tracking budgets, expenditures, and variances
- Applying formulas for earned value metrics
- Monitoring cost-to-complete and forecasted costs
- Visualizing cost overruns and savings opportunities
- Integrating cost tracking into dashboards
- Case Study: Analyzing budget variance for a construction project

Module 11: Data Cleaning and Management

- Handling duplicates, missing values, and errors
- Sorting, filtering, and advanced data manipulation
- Using text-to-columns and data splitting techniques
- Consolidating data from multiple sources
- Preparing clean data for analysis and reporting
- Case Study: Cleaning project timesheets for accurate reporting

Module 12: Collaboration and Shared Workbooks

- Sharing Excel files with teams and stakeholders
- Track changes and version control
- Protecting sensitive project data
- Using comments and notes for communication
- Co-authoring with Microsoft 365 and Teams integration
- Case Study: Collaborative project report preparation in a distributed team

Module 13: Advanced Analytical Functions

- Using statistical and financial functions for project evaluation
- Calculating probability, risk, and variance in project outcomes
- Advanced lookup and nested formulas for multi-dimensional data
- Integrating analysis results into dashboards
- Predictive analysis using Excel functions
- Case Study: Evaluating project risk and schedule variance using analytics

Module 14: Templates and Standardized Reporting

- Designing reusable project templates
- Automating recurring reports and dashboards
- Standardizing formats for executive reporting
- Creating template libraries for teams
- Reducing preparation time for recurring projects
- Case Study: Developing a reporting template for a PMO office

Module 15: Project Review and Continuous Improvement

- Consolidating lessons learned into Excel workbooks
- Tracking historical performance trends
- Integrating feedback loops for project improvement
- Creating dashboards to reflect past vs. planned metrics
- Planning continuous improvement initiatives
- Case Study: Using historical project data to optimize future planning

Training Methodology

- Instructor-led presentations with practical demonstrations
- Hands-on exercises with real-world project datasets
- Group discussions and collaborative problem-solving
- Case study analysis and interactive feedback
- Step-by-step guided template creation and dashboard building
- Practical exercises on automation, scenario analysis, and reporting

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.
f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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