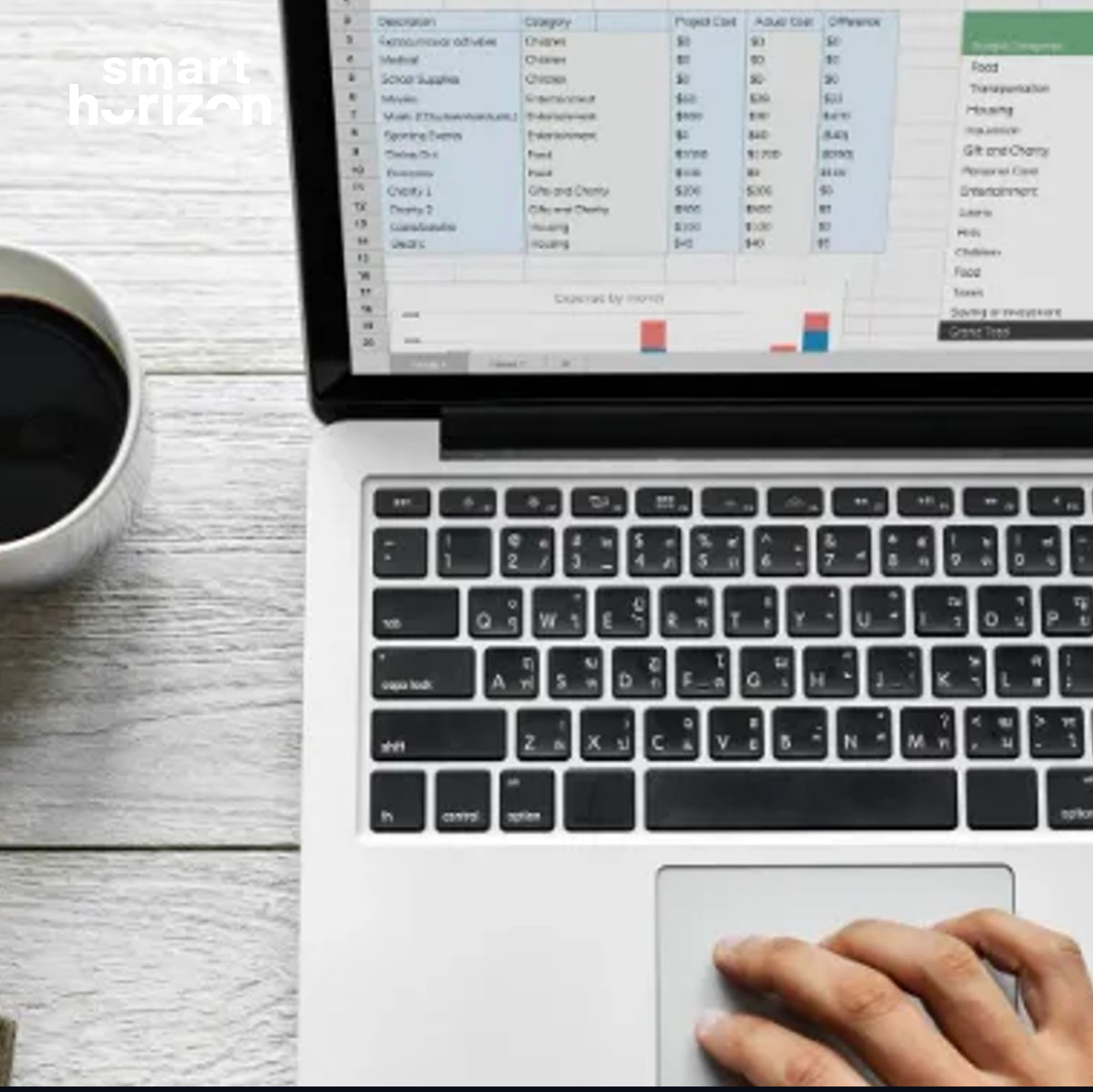


FINANCE & ACCOUNTING | COURSE BROCHURE

Advanced Excel: Power Query & Power Pivots

5 days | Classroom training | English

SMART HORIZON

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London W2 6BD, United Kingdom

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Course content

Why attend

This course provides advanced skills in Excel, focusing on Power Query and Power Pivot. Participants will learn to efficiently transform, analyse, and visualise large datasets, enhancing their data management and reporting capabilities for informed decision-making in their organisations.

Data professionals often face challenges in managing and analysing large datasets effectively. Without advanced tools like Power Query and Power Pivot, the process can be time-consuming and prone to errors, leading to inaccurate insights and delayed decision-making. This course addresses these issues by equipping participants with the skills to streamline data processes, automate repetitive tasks, and improve accuracy in reporting. By mastering these tools, attendees will be able to handle complex data scenarios, ensuring that they can derive actionable insights from their data efficiently and effectively. Furthermore, they will learn to create automated workflows that enhance productivity and reduce manual errors, which is crucial in fast-paced business environments.
Participants will engage in practical exercises that simulate real-world scenarios involving data transformation and analysis. They will learn to create complex data models, automate data retrieval, and produce insightful reports tailored to specific business needs. This hands-on approach ensures that participants not only understand the theoretical aspects of Power Query and Power Pivot but also gain practical capabilities that can be directly applied in their roles. By mastering these tools, attendees will enhance their analytical capabilities, enabling them to make data-driven decisions that positively impact their organisations and drive business success. They will also develop skills in presenting data visually, making it easier to communicate insights to stakeholders.

Professional Problems This Course Is Designed to Solve

- Difficulty translating subject knowledge into practical workplace decisions.
- Inconsistent approaches to the activities covered in the course outline.
- Lack of a structured plan for applying and reviewing new skills.

Course methodology

The course employs a hands-on approach, integrating practical exercises, case studies, and group workshops. Participants will work on real-world datasets to practice data transformation using Power Query and create data models with Power Pivot. Each session culminates in a project that produces tangible outputs, such as interactive dashboards and comprehensive reports, demonstrating their acquired skills. Additionally, participants will collaborate in groups to solve complex problems, fostering a deeper understanding of concepts and encouraging peer learning. This methodology ensures that participants leave with not only theoretical knowledge but also practical experience that can be immediately applied in their professional environments, enhancing their confidence in using these advanced Excel tools.



Course content

Course objectives

By the end of this course, participants will be able to:
• Analyse data transformation needs using Power Query to streamline data preparation.
• Construct complex data models in Power Pivot to enhance analytical capabilities.
• Justify the use of DAX functions for advanced calculations in Power Pivot.
• Compare different data sources and their integration using Power Query.
• Design interactive dashboards using Power Pivot for effective data visualisation.
• Prioritise data cleaning steps in Power Query to ensure data integrity.
• Assess the performance of data models in Power Pivot for optimisation.

Target audience

This course is suitable for:
• Data Analysts seeking to enhance their Excel skills for data manipulation.
• Business Intelligence Professionals needing to create advanced reports.
• Financial Analysts requiring efficient data analysis techniques.
• Operations Managers aiming to optimise data reporting processes.

Target competencies

Participants will develop competencies in:
• Transforming data using Power Query for analysis.
• Building and managing data models in Power Pivot.
• Utilising DAX for complex calculations and measures.
• Creating dynamic reports and dashboards in Excel.
• Integrating multiple data sources for comprehensive analysis.
• Optimising data models for performance and usability.

Course outline

Day 1: Introduction to Power Query

Applied activity: Participants will import a dataset from an Excel file and perform various transformations, such as filtering, sorting, and merging with another dataset. They will document each step taken in Power Query to create a clear transformation workflow.
Output: A cleaned and transformed dataset ready for analysis.

09:00–09:54	Understanding the Power Query interface and its features for data manipulation.



Course content

09:54–10:48	Importing data from various sources into Power Query for analysis.
10:48–11:00	Transforming data: filtering, sorting, and merging datasets effectively.
11:00–11:30	Coffee break
11:30–12:12	Transforming data: filtering, sorting, and merging datasets effectively. (continued)
12:12–13:06	Using the Query Editor for comprehensive data manipulation tasks.
13:06–14:00	Creating and managing queries for repeatable data processes.

Day 2: Advanced Data Transformation Techniques

Applied activity: Participants will create a complex query that involves multiple transformations, including custom columns and grouping. They will use M language to refine their query further and ensure the data meets specific business requirements.
Output: A comprehensive Power Query script demonstrating advanced transformation techniques.

09:00–09:54	Applying advanced filtering and grouping techniques in Power Query for data organisation.
09:54–10:48	Using custom columns and conditional logic for sophisticated data transformation.
10:48–11:00	Implementing data types and data profiling for quality assurance checks.
11:00–11:30	Coffee break
11:30–12:12	Implementing data types and data profiling for quality assurance checks. (continued)
12:12–13:06	Creating parameters for dynamic queries to enhance flexibility.
13:06–14:00	Utilising M language for custom transformations and advanced data manipulation.

Day 3: Introduction to Power Pivot

Applied activity: Participants will import transformed data from Power Query into Power Pivot, establish relationships between tables, and create calculated columns. They will explore basic DAX functions to enhance their data model and facilitate reporting.
Output: A Power Pivot data model with relationships and calculated fields.

09:00–09:54	Understanding the Power Pivot interface and its capabilities for data modelling.
09:54–10:48	Importing data from Power Query into Power Pivot for analysis.
10:48–11:00	Creating relationships between tables for effective data modelling.
11:00–11:30	Coffee break



Course content

11:30–12:12	Creating relationships between tables for effective data modelling. (continued)
12:12–13:06	Using calculated columns and measures in Power Pivot to derive insights.
13:06–14:00	Exploring the DAX language for data analysis and reporting.

Day 4: Advanced DAX Functions and Measures

Applied activity: Participants will create a series of measures using advanced DAX functions to analyse sales data. They will troubleshoot and optimise their calculations for performance, ensuring they meet business reporting needs.
Output: A set of DAX measures that provide insights into sales performance.

09:00–09:54	Exploring advanced DAX functions for complex calculations and data analysis.
09:54–10:48	Creating measures for dynamic reporting in Power Pivot to enhance insights.
10:48–11:00	Understanding context in DAX: row and filter context for accurate calculations.
11:00–11:30	**Coffee break**
11:30–12:12	Understanding context in DAX: row and filter context for accurate calculations. (continued)
12:12–13:06	Optimising DAX calculations for performance and efficiency in reporting.
13:06–14:00	Debugging and troubleshooting DAX formulas to ensure accuracy.

Day 5: Building Interactive Dashboards

Applied activity: Participants will design an interactive dashboard that integrates data from Power Pivot, using visualisations and slicers to enhance user experience. They will prepare the dashboard for presentation and feedback from peers.
Output: An interactive Excel dashboard ready for stakeholder review.

09:00–09:54	Designing effective dashboards in Excel using Power Pivot data for visualisation.
09:54–10:48	Incorporating slicers and timelines for user interactivity in reports.
10:48–11:00	Creating visualisations that communicate insights effectively to stakeholders.
11:00–11:30	**Coffee break**
11:30–12:12	Creating visualisations that communicate insights effectively to stakeholders. (continued)
12:12–13:06	Best practices for dashboard design and layout for clarity and impact.
13:06–14:00	Publishing and sharing dashboards with stakeholders for collaborative analysis.



Course content

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.

Dates, venues and fees

Current published course plans. Fees are per participant in GBP, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (GBP)
Dubai Confirmed dates	9 Nov 2026	13 Nov 2026	**£3,150.–**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,250.–**
Frankfurt Confirmed dates	23 Nov 2026	27 Nov 2026	**£2,650.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.–**
Kuala Lumpur Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,450.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.–**
Paris Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,860.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Rome Confirmed dates	4 Jan 2027	8 Jan 2027	**£2,450.-**
Online Confirmed dates	4 Jan 2027	8 Jan 2027	**£1,250.-**
Istanbul Confirmed dates	11 Jan 2027	15 Jan 2027	**£2,650.-**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,250.-**
Amsterdam Confirmed dates	25 Jan 2027	29 Jan 2027	**£2,540.-**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**£1,250.-**
Singapore Confirmed dates	8 Feb 2027	12 Feb 2027	**£2,820.-**
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.-**
London Confirmed dates	22 Feb 2027	26 Feb 2027	**£2,450.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**£1,250.–**
Dubai Confirmed dates	8 Mar 2027	12 Mar 2027	**£3,150.–**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,250.–**
Cape Town Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,890.–**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,250.–**
Frankfurt Confirmed dates	22 Mar 2027	26 Mar 2027	**£2,650.–**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,450.–**
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Paris Confirmed dates	26 Apr 2027	30 Apr 2027	**£2,860.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.-**
Istanbul Confirmed dates	10 May 2027	14 May 2027	**£2,650.-**
Online Confirmed dates	10 May 2027	14 May 2027	**£1,250.-**
Rome Confirmed dates	17 May 2027	21 May 2027	**£2,450.-**
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.-**
Amsterdam Confirmed dates	24 May 2027	28 May 2027	**£2,540.-**
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.-**
Singapore Confirmed dates	14 Jun 2027	18 Jun 2027	**£2,820.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,250.–**
London Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,450.–**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.–**
Vienna Confirmed dates	5 Jul 2027	9 Jul 2027	**£2,940.–**
Online Confirmed dates	5 Jul 2027	9 Jul 2027	**£1,250.–**
Dubai Confirmed dates	12 Jul 2027	16 Jul 2027	**£3,150.–**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.–**
Frankfurt Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,650.–**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Kuala Lumpur Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,450.-**
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,250.-**
Paris Confirmed dates	23 Aug 2027	27 Aug 2027	**£2,860.-**
Online Confirmed dates	23 Aug 2027	27 Aug 2027	**£1,250.-**
Cape Town Confirmed dates	6 Sept 2027	10 Sept 2027	**£1,890.-**
Online Confirmed dates	6 Sept 2027	10 Sept 2027	**£1,250.-**
Istanbul Confirmed dates	13 Sept 2027	17 Sept 2027	**£2,650.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.-**
Amsterdam Confirmed dates	20 Sept 2027	24 Sept 2027	**£2,540.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.-**
Singapore Confirmed dates	11 Oct 2027	15 Oct 2027	**£2,820.-**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,250.-**
London Confirmed dates	25 Oct 2027	29 Oct 2027	**£2,450.-**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**£1,250.-**
Dubai Confirmed dates	8 Nov 2027	12 Nov 2027	**£3,150.-**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.-**
Barcelona Confirmed dates	15 Nov 2027	19 Nov 2027	**£2,840.-**
Online Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Frankfurt Confirmed dates	22 Nov 2027	26 Nov 2027	**£2,650.-**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,450.-**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.-**
Paris Confirmed dates	13 Dec 2027	17 Dec 2027	**£2,860.-**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,250.-**



Course content

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon UK certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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View the latest course details online