

MANAGING, PREPARING REPORTS, AND ANALYZING BUSINESS DATA



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TRAINING CENTER



Introduction

Managing, Preparing Reports, and Analyzing Business Data Training Course gives professionals the practical skills to turn raw business data into decisions. Organisations collect far more data than they use, and reports often describe activity without explaining what it means. This program closes that gap. It covers data management, reporting design, analytical techniques, and communication of findings. Participants work with structured methods rather than software-specific tricks. As a result, learners can prepare reliable reports, analyse trends and performance, and present conclusions that managers act on. Furthermore, the course covers data quality, visualization, and reporting ethics.

Managing, Preparing Reports, and Analyzing Business Data Course Objectives

- Define business data types, sources, and governance responsibilities.
- Assess data quality and resolve completeness and accuracy issues.
- Structure reports for decision-making rather than description.
- Build KPI dashboards using the Balanced Scorecard logic.
- Apply descriptive statistics, trends, and variance analysis.
- Use segmentation, cohort, and Pareto analysis on business data.
- Diagnose performance problems with the 5 Whys and fishbone diagrams.
- Apply forecasting basics and scenario comparison.
- Design charts and dashboards with clear visual hierarchy.
- Present findings with the Pyramid Principle and clear recommendations.

Course Methodology

- Facilitated sessions built around real business datasets.

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- Report design and dashboard building workshops.
- Group exercises in data validation and analysis.
- Role-play of presenting findings to decision-makers.
- Case studies of strong and weak management reporting.
- Simulation of a monthly performance review.
- Peer review, reflection, and a personal reporting action plan.

Who Should Take This Course

- Business analysts and reporting specialists.
- Managers responsible for performance reporting.
- Finance, operations, and commercial professionals.
- Project and program managers tracking delivery data.
- HR and workforce analytics practitioners.
- Data stewards and quality officers.
- Consultants producing client-facing analysis.

Managing, Preparing Reports, and Analyzing Business Data Course Outlines

Day 1: Business Data Fundamentals

- Types of business data: operational, financial, customer, workforce.
- Data sources, systems, and ownership.
- Data governance, privacy, and compliance basics.
- Data quality dimensions: accuracy, completeness, timeliness, consistency.
- Common data errors and how they enter reports.



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- Master data and reference data concepts.
- Workshop: auditing a dataset for quality issues.

Day 2: Preparing and Structuring Data

- Data collection, validation, and cleansing routines.
- Structuring tables and fields for analysis.
- Calculating derived measures and ratios.
- Reconciliation and cross-checking techniques.
- Documenting assumptions and definitions.
- Version control and audit trails for reports.
- Workshop: preparing a dataset for analysis.

Day 3: Report Design and Performance Reporting

- From data to information: the DIKW hierarchy.
- Designing reports for decisions, not description.
- KPI selection and the Balanced Scorecard framework.
- Variance analysis: actual versus budget and forecast.
- Dashboards, traffic lights, and visual hierarchy.
- Reporting cadence and distribution discipline.
- Workshop: building a one-page performance report.

Day 4: Analyzing Business Data

- Descriptive statistics: mean, median, distribution, variance.
- Trend analysis, seasonality, and moving averages.
- Segmentation, cohort, and Pareto analysis.



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- Correlation, causation, and spurious relationships.
- Root cause analysis with the 5 Whys and fishbone diagrams.
- Forecasting basics and scenario comparison.
- Workshop: analysing a business dataset and drawing conclusions.

Day 5: Communicating Findings and Driving Action

- The Pyramid Principle for analytical communication.
- Data visualization principles and chart discipline.
- Writing executive summaries and recommendations.
- Handling questions, objections, and alternative interpretations.
- Turning analysis into decisions and action plans.
- Creating a personal reporting and analysis plan.
- Capstone: presenting an evidence-based business report.

Conclusion

By successfully completing Managing, Preparing Reports, and Analyzing Business Data Training Course, participants will have acquired the knowledge to manage data responsibly, prepare accurate reports, apply analytical techniques to business questions, design clear dashboards, and present findings that lead to decisions. They will also understand how to maintain reporting quality and documentation over time. Gentex Training Center delivers this program through applied workshops and expert facilitation, helping professionals make data genuinely useful to the business.





FAQs for the Managing, Preparing Reports, and Analyzing Business Data course

Q1 What is the "Managing, Preparing Reports, and Analyzing Business Data" course about?

It is a training program that teaches professionals to manage business data, produce reliable reports, and analyse performance for decision-making. It covers data quality, report design, KPI dashboards, analysis techniques, and presenting findings.

Q2 What are the key benefits of the "Managing, Preparing Reports, and Analyzing Business Data" course?

Participants gain faster, more reliable reporting, sharper analytical conclusions, and confidence presenting to senior stakeholders. Organizations benefit from fewer reporting errors, better-targeted decisions, clearer performance visibility, and reports that answer the questions managers actually ask.

Q3 What skills will I gain from the "Managing, Preparing Reports, and Analyzing Business Data" course?

Participants build data management and quality assurance, report design and KPI dashboard construction, analytical techniques and variance analysis, and data visualization and analytical communication.



Q4 What tools, methods, or standards are covered in the "Managing, Preparing Reports, and Analyzing Business Data" course?

The course covers the DIKW hierarchy, data quality dimensions, master and reference data concepts, data validation and reconciliation techniques, the Balanced Scorecard, KPI selection, variance analysis, descriptive statistics, trend and Pareto analysis, the 5 Whys, fishbone diagrams, forecasting basics, the Pyramid Principle, and data visualization principles.

Q5 How is the "Managing, Preparing Reports, and Analyzing Business Data" course applied in real-world practice?

Learners apply it by validating source data before reporting, building a one-page performance report with clear KPIs, running variance and trend analysis, designing dashboards with visual hierarchy, and presenting evidence-based recommendations in review meetings.