



# 6 STEPS TO DATA ANALYSIS CHEAT SHEET



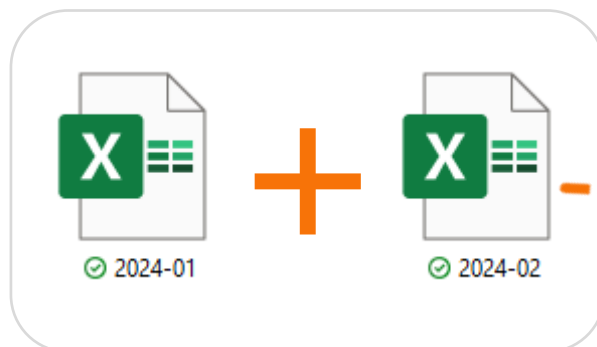
Hi-res PDF, Video & Practice File: [bit.ly/data-analysis-in-6](https://bit.ly/data-analysis-in-6)

## 1 Gather & Clean Data with Power Query: Automate Extracting, Transforming, Loading (ETL) data for analysis

Combine data from multiple Excel files:

How?

Load cleaned data in Tabular Layout:



Data tab > Get Data > From File > From Folder > Expand Combine Dropdown > Combine & Transform

Segment	Country	Product	Gross Sales	Discounts	Sales	Profit	Gross Profit %	Discount %
Channel Partners	Canada	VTT	38,934	2,725	36,209	26,475	68.0%	7.0%
Channel Partners	France	VTT	20,808	2,289	18,519	13,317	64.0%	11.0%
Enterprise	Mexico	VTT	69,250	7,618	61,633	-4,848	-7.0%	11.0%
Enterprise	USA	Amarilla	72,375	7,238	65,138	-4,343	-6.0%	10.0%
Government	Canada	Carretera	32,370	0	32,370	16,185	50.0%	0.0%
Government	Canada	Montana	779,625	109,148	670,478	91,328	11.7%	14.0%



Clean data in the Power Query Editor:

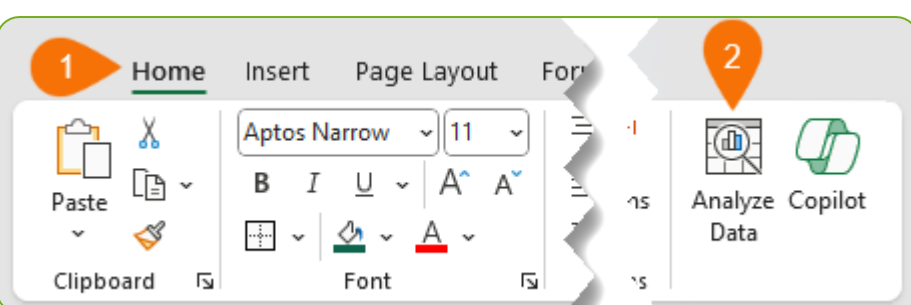
Table.RemoveColumns("#Inserted Division1",{"Manufacturing Price", "Date", "Discount Band", "Manager", "Units Sold", "Sale Price", "COGS"})

Segment	Country	Product	1.2 Gross Sales	1.2 Discounts	1.2 Sales	1.2 Profit
1 Channel Partners	Canada	VTT	38934	2725.38	36208.62	26475.12
2 Channel Partners	France	VTT	20808	2288.88	18519.12	13317.12
3 Channel Partners	Germany	VTT	29748	892.44	28855.56	21418.56
4 Channel Partners	Mexico	Montana	28080	1965.6	26114.4	19094.4
5 Channel Partners	USA	VTT	23472	2112.48	21359.52	15491.52
6 Enterprise	Canada	Amarilla	207375	26958.75	180416.25	-18663.75
7 Enterprise	France	Amarilla	248437.5	14906.25	233531.25	-4968.75

Frequently-Used Data Transformations

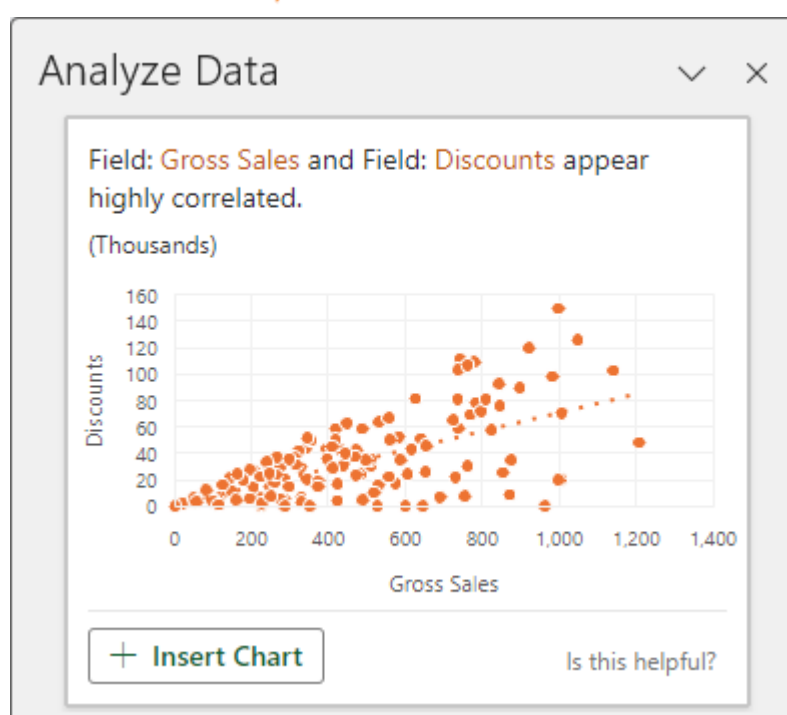
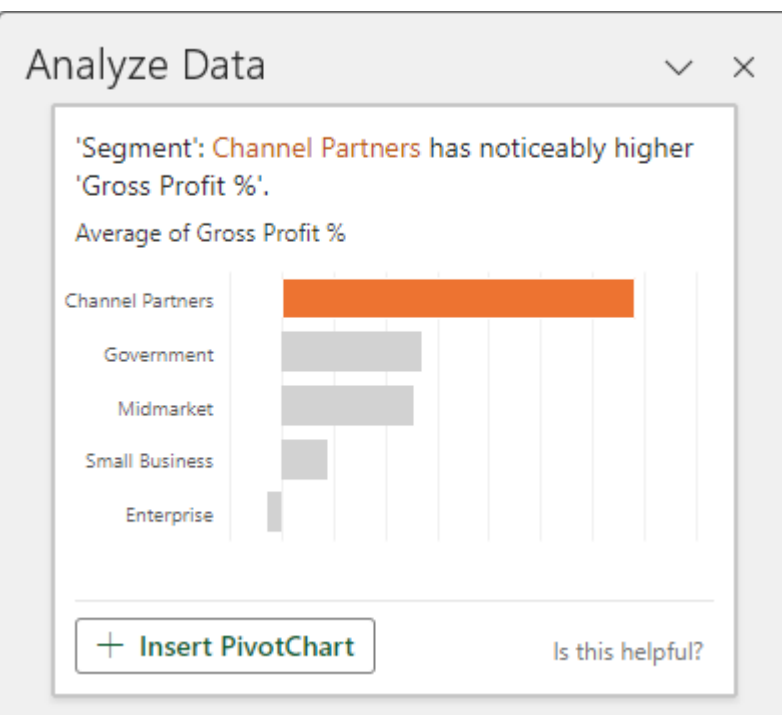
1. Combine multiple files
2. Remove duplicates
3. Split text
4. Replace values
5. Change data types
6. Filter out unnecessary data
7. Add calculated columns

## 2 Use Analyze Data Tool: Capture AI-driven insights & visualizations



Why use Analyze Data?

Analyze Data helps identify trends, patterns, outliers & insights in your data



## 3 Create PivotTables: Quickly summarize & analyze large datasets

How?

Select data > Insert tab > PivotTable > Select an output sheet, drag fields to wells

Average of Gross Profit %

	Amarilla	Carretera	Montana	Paseo	Velo	VTT	Grand Total
Enterprise	-3.8%	-6.1%	1.5%	-1.7%	-2.4%	-3.3%	-3.0%
Small Business	7.2%	7.9%	10.0%	9.4%	6.7%	9.6%	8.9%
Midmarket	23.3%	26.9%	29.2%	26.2%	24.2%	24.3%	25.9%
Government	28.2%	31.7%	25.3%	27.1%	28.0%	22.0%	27.0%
Channel Partners	65.9%	70.2%	69.5%	68.4%	66.9%	67.7%	68.2%
Grand Total	26.5%	29.0%	31.5%	23.5%	25.4%	22.7%	25.9%



## 4 Data Visualization: Use conditional formatting

Average of Gross Profit %

	Amarilla	Carretera	Montana	Paseo	Velo	VTT	Grand Total
Enterprise	-3.8%	-6.1%	1.5%	-1.7%	-2.4%	-3.3%	-3.0%
Small Business	7.2%	7.9%	10.0%	9.4%	6.7%	9.6%	8.9%
Midmarket	23.3%	26.9%	29.2%	26.2%	24.2%	24.3%	25.9%
Government	28.2%	31.7%	25.3%	27.1%	28.0%	22.0%	27.0%
Channel Partners	65.9%	70.2%	69.5%	68.4%	66.9%	67.7%	68.2%
Grand Total	26.5%	29.0%	31.5%	23.5%	25.4%	22.7%	25.9%

Why Conditional Formatting?

Data is faster to interpret with visual indicators



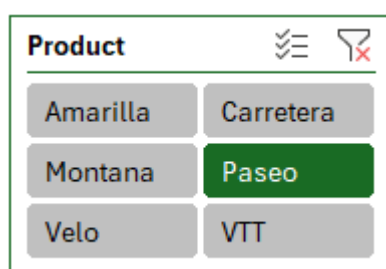
How?

Select data > Home tab > Conditional Formatting > Color Scales > Select Green - Yellow - Red Color Scale

## 5 Enhance Interactivity: Use Slicers for easy filtering

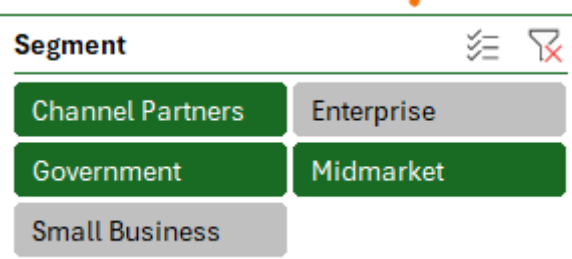
How?

Select PivotTable or Pivot Chart > Insert tab > Slicer > Select the Slicer to insert

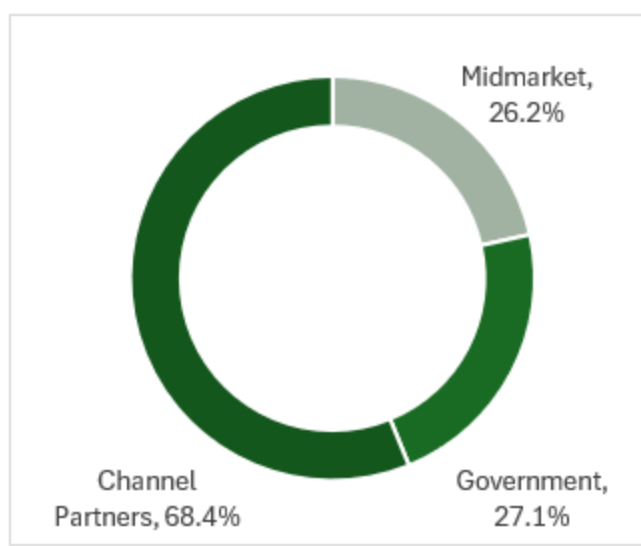


Average of Gross Profit %

	Paseo	Grand Total
Midmarket	26.2%	26.2%
Government	27.1%	27.1%
Channel Partners	68.4%	68.4%
Grand Total	31.9%	31.9%



Why Slicers? Enable users to filter and focus on the data they're interested in.



## 6 Bring it All Together: Create Excel dashboards



Why Dashboards?

1. Actionable insights at a glance
2. Timely business KPIs
3. Automatically update



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