Excel Techniques for Data Visualization

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Why Excel?

**Widely used:** Wealth of online tutorials

**Accessible:** Cost, ease of use

**Stepping stone:** Tableau, R, ArcGIS

It’s more powerful than you think...
When Anand Kalelkar started a new job at a large insurance company, colleagues flooded him with instant messages and emails and rushed to introduce themselves in the cafeteria.

He soon learned his newfound popularity came with strings attached. Strings of code. Many of Mr. Kalelkar’s co-workers had heard he was a wizard at Microsoft Excel and were seeking his help in taming unruly spreadsheets and pivot tables gone wrong.

“People would come up to me and say, ‘Hey, I hear you’re the Excel guy,’ ” said the 37-year-old metrics consultant from Oak Brook, Ill. Mr. Kalelkar said he has become “a little more passive-aggressive,” warning help-seekers, “Don’t come to me, go to Google first.”

Excel buffs are looking to lower their profiles. Since its introduction in 1985 by Microsoft Corp., the spreadsheet program has grown to hundreds of millions of users worldwide. It has simplified countless office tasks once done by hand or by rudimentary computer programs, streamlining the work of anyone needing to balance a budget, draw a graph or crunch company earnings. Advanced users can perform such feats as tracking the expenditures of thousands of employees.
Demo/Workshop

- Exploratory analysis (for ourselves)
- Choosing and building effective visuals (for others)
- Building dynamic tools
- Leveraging automated data collection
Which chart should I use?

Visual vocabulary

Designing with data

There are so many ways to visualise data - how do we know which one to pick? Use the categories across the top to decide which data relationship is most important in your story, then look at the different types of chart within the category to form some initial ideas about what might work best. This list is not meant to be exhaustive, nor a wizard, but is a useful starting point for making informative and meaningful data visualizations.

ft.com/vocabulary
Resources & Tools

Keyboard Shortcuts
Save time and clicks: https://exceljet.net/keyboard-shortcuts

Tutorials
Google is there for you. Also, try: https://digitaldefynd.com/best-excel-tutorial-training-course-classes/

Build a Map

Data Automation
FRED: http://fred.stlouisfed.org/
FRED Excel Add-in: http://research.stlouisfed.org/fred-addin/

Inspiration
Read Hans Rosling’s Factfulness or Edward Tufte’s works
Summary and Takeaways

Goal: Make data easy to understand
• Simplify and beautify visual information
• Tell a true story

Longer-term goals
• Build dynamic analytical tools
• Leverage data automation and reporting
Questions?

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