

€ TRAINING

Successful Planning with Organizing,
Delegating





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Introduction:

The Successful Planning with Organizing and Delegating training program is designed to give participants an understanding of several management methods, processes, and procedures, as well as practice on several key management techniques. It presents a common, standard management technique methodology using a simple theoretical foundation and enhances learning with practical activities.

In today's data-driven landscape, the ability to transform raw data into compelling visual stories is paramount. Both Tableau and Power BI offer powerful suites of tools that empower users to do just that. Whether you're a seasoned data analyst or a newcomer to the field, this program will equip you with the skills and knowledge needed to harness the full potential of Tableau and Power BI for creating insightful and impactful visualizations.

Program Objectives:

At the end of this program the participants will be able to:

- Recognize internal and external influences on daily planning.
- Use basic planning process tools for work and project strategy.
- Understand and develop skills to complete work on time.
- Learn to organize work and projects for successful completion.
- Use Microsoft Power BI and Tableau to create interactive dashboards and reports.
- Learn how to clean, transform, and combine data from multiple sources.
- Create compelling visualizations using charts, graphs, and other design elements.
- Communicate data insights effectively to stakeholders.

Targeted Audience:

- Mid-level management.
- Supervisors.
- Team leaders.
- Project managers.
- Data analysts and professionals in various industries.
- Individuals aiming to refine data visualization expertise.

- Those eager to harness Tableau and Power BI capabilities effectively.
- Professionals are seeking to elevate their data-driven decision-making.

Program Outlines:

Unit 1:

Creating an Attitude to Change How We Plan and Organize Work:

- New systems & strategic thinking.
- Overview and context of organizational change and the impact on planning and organization.
- Identifying a standard of excellence in the organization, team, and personal work.
- Review of management processes and skill areas.
- Using a planning process to set goals and get projects started.

Unit 2:

Importance of Planning Management:

- Integrating goals, scope, work structure, and management planning.
- Identifying initial resource requirements.
- Identifying risk techniques that affect work assignments, priorities, and deadlines.
- Communication that responds to who, what where, when, how, why.
- Understanding the importance of quality planning in work assignments.

Unit 3:

Delegation, Personal Organization, and Setting Priorities:

- Understanding how people approach their work.
- Planning for time management, scheduling and meeting deadlines.
- Using proper delegation skills to empower staff.
- Improving prioritizing of work and work tasks.
- Planning for delegation responsibility and authority.

Unit 4:

Planning Effectively with Your Team:

- Identifying the skills required to obtain the help of others.
- The importance of group skills to achieve team success.
- The importance of interpersonal skills in making personal and team decisions.
- Empowering the team through the development of interpersonal skills.
- The importance of versatility in team relations.

Unit 5:

Developing Personal and Team Change Plans

- Innovation and improvement for personal and team change.
- Identification of change processes and human change.
- Techniques to set personal and team change goals.
- Dealing with people who do not want to change.
- Developing an action plan for personal and team change.

Unit 6.

Data Analysis & Visualization with Power BI and Tableau:

- Understanding the Fundamentals of Data Analysis and Visualization.
- Overview of Power BI and Tableau.
- Installing and Setting Up Power BI and Tableau.
- Connecting to Data Sources.
- Creating and Formatting Tables and Charts.

Unit 7.

Data Cleaning, Transforming, and Combining:

- Data Cleaning and Transformation.
- Combining Data from Multiple Sources.

- Advanced Data Transformations.
- Data Modeling and Relationships.
- DAX Formulas and Functions.

Unit 8.

Creating Visualizations and Dashboards:

- Basic Chart Types and Visualizations.
- Advanced Chart Types and Visualizations.
- Designing Effective Dashboards.
- Creating Interactive Filters and Parameters.
- Creating and Using Bookmarks.

Unit 9.

Advanced Data Analysis Techniques:

- Advanced Data Analysis Techniques.
- Creating Calculated Fields and Measures.
- Using Pivot Tables and Pivot Charts.
- Time-Series Analysis and Forecasting.
- Statistical Analysis and Modeling.

Unit 10.

Communicating Data Insights Effectively:

- Using Storytelling Techniques to Communicate Data Insights.
- Creating Effective Presentations and Reports.
- Collaborating and Sharing Reports.
- Best Practices for Data Visualization and Analysis.
- Recap and Review of Course Material.