

TOPIC	CONCEPT	DESCRIPTION
A 5 Basic Elements of Pivot Tables	1. Field List	• Category of data (columns from data table).
	2. Row Labels	• How to group your data (displayed vertically).
	3. Values	• Summarized data (SUM, AVG, COUNT, etc.) about a particular category.
	4. Column Labels	• How to group your data (displayed horizontally).
	5. Report Filter	• Selectively show/hide specific data in your Pivot Table.
B 5 Drawbacks of NOT Using Pivot Tables	1. Increase Chance of Errors	• Humans make mistakes; computers only do if we give them bad instructions.
	2. Wasted Time	• All other methods of data analysis require multiple time-consuming steps.
	3. Information Overload	• Too much information hides the key takeaways and creates confusion.
	4. Difficult to Modify	• Change is inevitable in today's world. Why not be ready for it?
	5. Tunnel Vision	• Wearing blinders may keep you on a track that you shouldn't be on in the 1st place.
C 5 Examples of When to Use Pivot Tables	1. Find Quick Answer to a Question	• Throw a Pivot Table together in less than 60 secs, delete when finished.
	2. Discover Hidden Trends	• Game-changing insights are buried inside your data. Dig them up with Pivot Tables.
	3. Create Reports	• Perfect for single-use or recurring summaries of important information.
	4. Create Dashboards	• Present all vital business metrics in one place & update them automatically.
	5. Impress the Pants off your Boss!	• Mastery of Pivot Tables will give you instant "genius status." Trust me.
D 5 Key Benefits of Pivot Tables	1. Quick Setup Time	• 5 Simple steps to create your Pivot Table in under 5 min (see below).
	2. Powerful Analysis	• Lookup, calculate, group, & summarize millions of rows of data . . . in seconds.
	3. Relevant Data	• Deliver a clear, concise, and intuitive message that requires no explanation.
	4. Customizable	• Formatting & functionality tailor-made to suit your ever-changing business needs.
	5. No manual work . . . ever again!	• "Set it and forget it!" – Ron Popeil.
E 5 Steps to Creating a Pivot Table (SAGES)	1. S elect Data	• Choose the data you want to summarize, then insert a Pivot Table.
	2. A sk Questions	• Ask specific questions about your data (Ex: Total sales in January in NYC?).
	3. G roup Data	• Drag field(s) into Row Labels to group your data in a logical manner.
	4. E xperiment	• Keep playing around until you find the answers to your questions.
	5. S how Pivot Table	• Format your Pivot Table so it's clean, polished, and professional.

