

ExcelShir

You'll see.



SPOTLIGHT

EXCEL PIVOT TABLES



Taught by Shir Aviv



Who am I?



Who I've Worked With

Publicis
LifeBrands
Medicus

SAATCHI
&
SAATCHI

diadeis 
creating brand efficiency

HUGE

Bloomberg

J.P.Morgan

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About.com

NYIT
NEW YORK INSTITUTE OF TECHNOLOGY

RENT THE RUNWAY

A V O N
the company for women

 **Prudential**

ADP

vimeo

**AMERICAN
EXPRESS**

REBAG

 **ExcelShir**
You'll see.

Finish this sentence...

I want to learn about
Pivot Tables because _____

Class Overview

1. What is a Pivot Table and why should I care?
2. Example: LEGOs
3. Learning the lingo
4. Example: Salsa log
5. Case Study: How I made \$70,000 using Pivot Tables
6. Workshop: How to create a Pivot Table (I Demo)
7. Workshop: Build your own Pivot Tables (You Do)
8. Workshop: Review answers (We Review)
9. Recap Discussion
10. Class Evaluation
11. Q & A

What is a Pivot Table?

Wikipedia:

“A **pivot table** is a table of grouped values that aggregates the individual items of a more extensive table (such as from a database, spreadsheet, or business intelligence program) within one or more discrete categories. This summary might include sums, averages, or other statistics, which the pivot table groups together using a chosen aggregation function applied to the grouped values.”

Huh?



Example: LEGOs

Not Just Fun & Games



Starts with a Question...

1. How many batches of Red LEGO bricks were manufactured? (***Conditional Formatting***)
2. How many batches of LEGOs were manufactured in Kansas in 2018? (***Sorting***)
3. What is the total number of green rectangular LEGOS that were manufactured after 12 pm? (***Filtering***)
4. What is the average # of defective units that were produced in Florida in batches of over 5,000 units? (***Advanced Formulas***)

What's Wrong With This?

1. Manual → Errors
2. Time Consuming
3. Information Overload
4. Difficult to Change
5. Tunnel Vision

You want
me to do
what???



Learning the Lingo

What **should** have been taught in school...

The Data Table

Columns					
Rows	Batch Number	Brick Color	Length (mm)	Location Manufactured	Date Manufactured
	10138	White	15.80	Vermont	03/23/20
	10272	Blue	16.00	Texas	11/04/18
	10303	White	16.00	Florida	04/18/19

- **Column** = Type of data / attribute / field / category
- **Row** = Individual record / particular instance of a specific member of the table

The Pivot Table Builder

1. **Fields** = Choose a category of data (same as columns from the data table)

5. **Filters** = Show/hide data in your Pivot Table

2. **Rows** = Group your data (displayed in rows)

4. **Columns** = Group your data (displayed in columns)

3. **Values** = Summarize your data (e.g. SUM, AVERAGE, COUNT, etc.)

Example: Salsa Log

They used to call me “*Gringo Salsero*”

Pop Quiz

The key takeaway from the last example is:

- A. Pivot Tables are not intimidating
- B. Tracking side income is as easy as 1, 2, 3...5, 6, 7
- C. People love nerdy white guys who can dance
- D. All of the above

How I Made \$70,000 Using Pivot Tables

Case Study: Legal Funding Inc.

Let's Compare...

Before

1. Hundreds of errors
2. Slow & repetitive data entry
3. Inaccessible data
4. Tedious & limited reporting
5. Uninformed decisions

After

1. Zero errors
2. Fast & efficient data entry
3. Search data in seconds
4. Instant & unlimited reporting
5. Informed decisions

How to Create a Pivot Table

1. **S**elect Data & Insert Pivot Table
2. **A**sk Questions
3. **G**roup Data
4. **E**xperiment
5. **S**how Pivot Table

Memory Trick:

SAGES

Workshop:

Build your own Pivot Tables

Recap: *When* Should I Use a Pivot Table?

1. Find a Quick Answer to a Question
2. Discover Trends
3. Create Reports
4. Create Dashboards
5. Impress the Pants Off Your Boss!

Recap: *Why* Should I Use a Pivot Table?

1. Quick Setup Time
2. Powerful Analysis
3. Relevant Data
4. Customizable
5. No Manual Work...Ever Again!

Class Evaluation



Questions?



Thank You!

