

Spreadsheet Projects – A Complete Guide

0. Overview

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| 1. TYPES OF PROJECT | 3. FIRST CLIENT MEETING |
| 2. TECHNIQUES REQUIRED | 4. DELIVERY |

1. Types of Project

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| <ul style="list-style-type: none"> • Data Organisation – an input form, an Excel database, a dashboard • Data Cleansing – usually via VBA • Data Manipulation – moving data around (VBA) | <ul style="list-style-type: none"> • Data Analysis – pivot tables, database formulae • Modelling – input, process, output, typically formula-driven • Many others – and combinations of the above! |
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2. Techniques Required

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| <ul style="list-style-type: none"> • Spreadsheet Layout and Formatting • Formulae (to create models) • Data Analysis techniques (pivot table, database formulae) | <ul style="list-style-type: none"> • Dashboard Creation (sophisticated presentation) • VBA • Userforms |
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3. First Client Meeting

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| <ul style="list-style-type: none"> • Manage client expectations - crucial • “Underpromise / overdeliver” - Estimate what is possible and promise 50% • Resist tendency to ‘help’ (but kindness is important!) | <ul style="list-style-type: none"> • Clients expect push back from you • Translate requirements to techniques (live!) • How will you get feedback? (And who can you safely ignore?) • Timescales |
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4. Delivery

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| <ul style="list-style-type: none"> • Iterative approach is best • Not all iterations are equal – first is most important! • Get feedback – but limit it! | <ul style="list-style-type: none"> • Acknowledge additional requirements • Testing at both ends • Guarantee of accuracy? • Ongoing maintenance |
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