Category

Data & AI

Data Fundamentals for Business Users Playbook (From Zero to Data-Curious)

A beginner curriculum that takes non-technical employees from data anxiety to confidently reading a dashboard and asking one good clarifying question.

- Beginner
- Beginner
- Template Included
- Workshop Ready

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- 7 minute(s)

Overview

Take employees who avoid the dashboard entirely to reading it with confidence, in five short modules covering vocabulary, sources, basic stats, tools, and judgment.

Do employees need to learn Excel or SQL for this?

No. This playbook is scoped to reading and questioning a dashboard someone else built, not building reports from scratch. Excel or query skills belong in a separate, more advanced track for employees whose role actually requires them.

How is this different from a standard BI tool onboarding session?

A tool onboarding session teaches which buttons do what in a specific product. This playbook teaches the underlying vocabulary, source awareness, and judgment that transfer even when the tool changes — the tool-specific clicks are only one of five modules.

What if someone still feels lost after all five modules?

That's common and expected for a first pass — pair them with their peer buddy for one more real-world question before escalating, and revisit only the module tied to their specific gap rather than repeating the whole course.

Can this run self-paced instead of live?

Vocabulary and Sources work reasonably well self-paced with recorded walkthroughs. Basic Stats, Tools, and Judgment lose most of their value without a live facilitator who can watch someone struggle with their own dashboard in real time and intervene.

What do we do with employees who turn out to already be advanced?

Fast-track them past Modules 1-3 straight to the Module 5 judgment scenarios, and consider inviting them to be a peer buddy for the next cohort — that's often a better use of their time than sitting through content they've outgrown.

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This playbook — including every framework, template, and step-by-step section — is available free to Think Insights subscribers. Enter your email to unlock it instantly and get our weekly insights newsletter. No account needed, and access is remembered on this device.

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