

Advanced Excel Skills for Finance Managers and Planning Experts

Course Overview:

Proficiency in Excel is essential for professionals in the financial services sector. This course offers advanced training in Excel, focusing on industry-specific applications and techniques. Participants will learn how to effectively analyze financial data, create complex financial models, and generate insightful reports. The course equips learners with the necessary skills to enhance their productivity and decision-making capabilities in the finance industry.

Delivery Mode:

Face-to-face hands-on training using real-world financial datasets and scenarios.

Assessment Mode:

Practical exercises, case studies, and a final project to evaluate participants' mastery of advanced Excel skills in financial contexts.

Course Objectives:

Upon completion of the course, participants will be able to:

- 1) Utilize advanced Excel functions and formulas for financial analysis and modeling.
- 2) Develop sophisticated financial models for forecasting, budgeting, and investment analysis.
- 3) Apply data visualization techniques to effectively communicate financial insights.
- 4) Automate repetitive tasks and improve efficiency through Excel macros and VBA (Visual Basic for Applications).
- 5) Enhance data analysis and reporting capabilities for financial decision-making.
- 6) Understand and apply advanced Excel techniques specific to financial services, such as pivot tables, goal seeking, and scenario analysis.
- 7) Improve data accuracy and integrity through data validation and auditing features in Excel.

Target Audience:

This course is designed for professionals working in the financial services sector, including investment bankers, financial analysts, portfolio managers, risk managers, tax consultants, HRM, accountants, and finance executives. It is suitable for individuals who have a foundational understanding of Excel and are seeking to expand their skills for financial analysis and reporting.

Learning Outcomes:

Upon completion of the training, participants will gain the following skills:

- 1) Advanced proficiency in using Excel for financial analysis, modeling, and reporting.
- 2) Ability to create complex financial models for forecasting, budgeting, and investment analysis.
- 3) Expertise in utilizing Excel functions and formulas specific to financial services.
- 4) Proficient in data visualization techniques to effectively communicate financial insights.
- 5) Competence in automating tasks and improving productivity using Excel macros and VBA.
- 6) Mastery of advanced Excel features for financial services, such as pivot tables, goal seeking, and scenario analysis.
- 7) Skill in ensuring data accuracy and integrity through data validation and auditing in Excel.

Training Software:

Microsoft Excel (latest version)

Fee:

• 700,000/= for the entire course.

Modules:

- 1) Advanced Functions and Formulas for Financial Analysis
- 2) Financial Modeling for Forecasting and Budgeting
- 3) Data Visualization for Financial Insights
- 4) Automation and Efficiency with Excel Macros and VBA
- 5) Advanced Excel Techniques for Financial Services
- 6) Data Validation and Auditing for Data Accuracy
- 7) Managing and Analyzing Large Datasets in Excel
- 8) Advanced Lookup and Reference Functions for Financial Analysis
- 9) Optimization and Solver Tools for Financial Decision Making
- 10) Monte Carlo Simulation for Risk Assessment in Excel
- 11) Excel Add-ins for Financial Analysis and Reporting
- 12) Using Power Query and Power Pivot for Data Analysis in Finance
- 13) Cash Flow Analysis and Management in Excel
- 14) Advanced Financial Functions in Excel (IRR, NPV, XIRR, etc.)
- 15) Consolidating Financial Statements with Excel
- 16) Excel Tips and Tricks for Finance Managers

Note: The course outline provided above is a sample structure and can be customized to align with the specific requirements and needs of the target audience.