ADVANCED EXCEL COURSE

This course is tailored for those who perform intensive data analysis which incorporates data from other systems, for example external sources like SAP, Sage among others. This may include consolidating corporate budgets and forecasts from various departments, cash flow management, tracking invoices, management reporting among others which require flexible knowledge and use of various Advanced Excel Functions and Features.

WHY THIS ADVANCED EXCEL COURSE?

Advanced Excel plays a very important role in structuring & presenting data so that it looks impressive. Once one has a good understanding of Excel features like tables, cell styles, formatting options, then it is necessary to make awesome Excel workbooks.

The role of this course is to teach participants the various formulas used in Excel, how to debug them, audit them and how to use which formula for which occasion (and also know few alternatives for any given formula problem).

ABOUT THE COURSE:

GOOLEE is offering this high impact capacity building workshop to individuals and organizations in different sectors to enable them embrace the importance of analyzing data, forecasting and making decisions using Advanced Excel.

COURSE GOAL:

This course is aimed at exposing participants to the use of Advanced Excel formulas and features in intensive data analyses.

OBJECTIVES OF THE COURSE:

1. To teach participants the advanced formulas as well as how to use which formula for which occasion.
2. To equip participants with the knowledge on how to debug and audit the advanced formulas.
3. To explore the magic of analyzing data using Advanced Excel

COURSE CONTENT:

The course is organized in modules and each module covers a reasonable content to enable participants connect and progress successively in the next modules.
Module 1: Introduction to Advanced Excel

- Get a head start with templates and set up an Excel template
- Create new default workbook and worksheet templates
- Learn how modular templates can make your spreadsheets more consistent and much quicker to set up
- Customizing the Excel interface to put the tools that you need at your fingertips.
- How to build in checks and controls from the outset
- Key techniques that reduce risk and increase automation and efficiency
- Documentation and review tools

Module 2: Data Validation

- Extended uses of Data Validation
- Working with validation formulae
- Other methods of tracking down invalid entries

Module 3: Preparing your data for analysis

- Mastering lookup functions (INDEX, MATCH)
- Creating helper columns using DATE and TEXT functions
- Applying NESTED-IF, AND, OR to organize data

Module 4: Methods of Summarizing Data

- Using SUMIFS and COUNTIFS
- Advanced uses of PIVOT-TABLE features like Value Field Settings, Grouping Data and Slicers among others
- Identify Major Customers, Top Products, Top/Bottom Sales reps…LARGE, SMALL, MAX, MIN
- Advanced Range Names and Formula in Names
- Calculations and reporting in Power Pivot – an introduction to Data Analysis Expressions (DAX)

Module 5: Report Visualization Techniques in Excel

- Dynamic charts (using CHOOSE & OFFSET functions) & Sparklines for trends
- Report Interactivity - Using Pick-Lists, Form Controls like combo box & Excel Camera
- Effectively using Conditional Formatting (formula-driven) for reporting
- Exchanging information with VB code
- Calculations in Power Pivot – an introduction to Data Analysis Expressions (DAX)
Module 6: Decision Making with Excel

- Applications of Financial functions (Amortization table, FV, NPV, IRR, etc.);
- Sensitivity (“What-if”) analysis on models using Data Tables, Goal Seek, Scenarios;
- Laying out a model in Excel (Budget Model case study);
- Using Excel to help you make decisions
- Create and manage alternative scenarios
- Make more profit or incur less expense by using Excel Solver to identify the best solution
- Use of External Data tools

COURSE OUTCOMES:

At the end of the course, participants should be able to:

1. Apply advanced formulas to lay data in readiness for analysis
2. Use advanced techniques for report visualizations
3. Leverage on various methodologies of summarizing data
4. Understand and apply basic principles of laying out Excel models for decision making

WHAT YOU REQUIRE:

Interested organizations/institutions/individuals are expected to have laptop(s) while attending the workshop and should at least have some background in using Excel.

DURATION:

This is 3 days training program.

VENUE:

The course will take place in Nairobi at our GOOLEE training suite. However, organizations which prefer to host this event at their preferred location are encouraged to apply for the tailored arrangement.

COST:

The course fee is $360 per person (break tea and lunch are provided). For client hosted trainings with participants more than 10, a discount of 15% applies.

HOW TO REGISTER:

Interested participants should apply by email to capacitydevt@goolecinstitute.com

For further inquiries you can also call on: +254 721445293

Note:

A max of 10 participants is required for this program; and please you are advised to register two weeks in advance before the training start date for adequate preparation.