

Business and Financial Modelling: Excel Skills for Analysts

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Los Angeles (USA)

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Business and Financial Modelling: Excel Skills for Analysts

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Why This Course

Financial modeling has become a critical capability for finance professionals involved in forecasting, investment evaluation, and strategic decision-making. Well-designed financial models allow organizations to analyze complex financial scenarios, evaluate business opportunities, and support data-driven decisions. However, building reliable and flexible models requires a strong understanding of Excel tools, financial logic, and best practices in model design.

This intensive 5-day program is designed to help professionals strengthen their expertise in Excel-based financial modeling. Participants will learn how to construct integrated financial models, perform scenario and sensitivity analysis, and develop valuation models used in corporate finance and investment analysis. Through hands-on exercises and real-world examples, the course equips participants with practical skills to create robust financial models that support effective decision-making.

What You'll Learn and Practice

By participating in this program, you will:

- Apply advanced Excel functions and tools used in professional financial modeling.
- Build structured and flexible financial models that minimize errors.
- Create integrated three-statement financial models linking income statement, balance sheet, and cash flow.
- Conduct sensitivity analysis and scenario planning for financial projections.
- Develop valuation models including Discounted Cash Flow DCF and comparable company analysis.
- Present financial model outputs using clear data visualization and dashboards.

The Program Flow

Day 1: Excel Foundations for Financial Modeling

- Setting up Excel for efficient financial analysis.
- Applying key Excel functions commonly used in financial modeling.
- Using data tables and scenario tools for model testing.
- Implementing best practices in spreadsheet structure and model design.

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A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver, set against a background of concentric circles.

Day 2: Building Integrated Financial Statement Models

- Forecasting revenues and operating expenses.
- Modeling balance sheet components and working capital assumptions.
- Constructing a cash flow statement within the financial model.
- Balancing and troubleshooting integrated financial models.

Day 3: Advanced Financial Modeling Techniques

- Performing sensitivity analysis using Excel data tables.
- Developing scenario planning models and dynamic assumptions.
- Understanding the basics of Monte Carlo simulation for risk analysis.
- Creating dashboards to display key model outputs.

Day 4: Valuation Modeling

- Building Discounted Cash Flow DCF valuation models.
- Performing comparable company analysis for valuation benchmarking.
- Understanding the structure of merger models for transaction analysis.
- Introduction to leveraged buyout LBO modeling concepts.

Day 5: Model Application and Visualization

- Applying financial models for investment and project evaluation.
- Using advanced visualization techniques to present financial data.
- Communicating model results clearly to decision-makers.
- Implementing best practices for model documentation and maintenance.

Individual Impact

- Strengthen expertise in financial modeling and Excel analysis.
- Improve the ability to evaluate investments and financial performance.
- Gain practical experience in building professional financial models.
- Enhance confidence in presenting financial insights to stakeholders.

Work Impact

- Improve financial forecasting accuracy and analytical capabilities.
- Support better investment and strategic decision-making.
- Increase efficiency in financial analysis and reporting processes.
- Enhance the quality and clarity of financial presentations.

A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver. The pieces are arranged on a checkered board with concentric circles in the background.

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Training Methodology

This program focuses on practical learning to ensure participants gain hands-on modeling experience. Training methods include:

- Interactive demonstrations and guided Excel exercises.
- Real-world financial modeling case studies.
- Step-by-step model-building workshops.
- Scenario analysis and valuation simulations.
- Practical templates and tools for professional financial modeling.

Beyond the Course

By the end of the program, participants will be able to:

- Build integrated three-statement financial models for business analysis.
- Conduct sensitivity and scenario analysis to evaluate financial outcomes.
- Develop valuation models for investment and corporate finance decisions.
- Present financial model results clearly using dashboards and visual reports.

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