

Advanced Business & Financial Reporting with Excel Mastery

2027 8 – 4
Washington DC (USA)

UK Traininig

PARTNER



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The Program Flow

Day 1: Advanced Excel Functions for Financial Analysis

- Advanced Excel principles for finance professionals.
- Complex financial functions: NPV, IRR, XNPV, and XIRR.
- Advanced lookup functions: INDEX-MATCH and XLOOKUP.
- Array formulas and dynamic arrays.
- Power Query for data cleaning, transformation, and preparation.
- Structuring workbooks for accuracy, flexibility, and ease of review.
- Practical exercise: Preparing financial data using advanced formulas and Power Query.

Day 2: Financial Modeling Techniques

- Building three-statement financial models.
- Linking income statement, balance sheet, and cash flow statement.
- Sensitivity analysis and scenario planning.
- Valuation models, including discounted cash flow and comparable company analysis.
- Monte Carlo simulation basics for risk analysis.
- Building flexible assumptions and model drivers.
- Workshop: Developing a flexible three-statement financial model.

Day 3: Data Analysis and Business Intelligence

- PivotTables and PivotCharts for financial reporting.
- Using PivotTables to summarize, analyze, and present large financial datasets.
- Power Pivot for data modeling.
- DAX for advanced calculations and financial measures.
- Creating KPI dashboards.
- Designing reports that support management decision-making.
- Practical exercise: Building a financial KPI dashboard using business intelligence tools in Excel.

Day 4: Advanced Data Visualization

- Custom chart types for financial data.
- Selecting the right visual format for financial reports.
- Interactive dashboards using form controls.
- Conditional formatting for data presentation.
- Sparklines and data bars for trend analysis.
- Designing executive-friendly visual summaries.
- Workshop: Creating an interactive budget variance analysis dashboard.

Day 5: Automation and Reporting Best Practices

- VBA macros for report automation.
- Automating repetitive reporting tasks.
- Building dynamic report templates.
- Data validation and error checking.
- Best practices for financial report design.
- Improving accuracy, readability, and professional presentation.
- Final activity: Designing a dynamic executive summary report and automated financial dashboard.

Individual Impact

- Strengthen your advanced Excel capability for finance and reporting tasks.
- Improve confidence in building financial models and dashboards.
- Reduce manual work through automation and better data handling.
- Enhance your ability to analyze complex financial data.
- Improve report accuracy, structure, and presentation quality.
- Gain practical skills that can be applied immediately in daily finance work.

Work Impact

- Improve the quality and speed of financial reporting.
- Support better decision-making through clearer dashboards and financial insights.
- Reduce errors in financial models and reports.
- Improve budgeting, forecasting, variance analysis, and performance reporting.
- Increase efficiency through automation and reusable reporting templates.
- Strengthen finance team capability in data analysis and business intelligence.

Training Methodology

This program uses a practical and hands-on approach focused on real financial reporting and modeling scenarios. Participants will work directly in Excel throughout the course and build tools they can adapt to their own workplace needs. Learning methods include:

- Guided Excel demonstrations and hands-on practice.
- Financial modeling workshops.
- Formula-building and data transformation exercises.
- PivotTable, Power Pivot, and DAX activities.
- Dashboard design and visualization practice.
- Budget variance and KPI reporting case studies.
- VBA automation exercises.
- Peer review, facilitator feedback, and practical reporting projects.

A graphic of a chessboard with several chess pieces. A gold king piece is prominent in the foreground, with a silver pawn and a gold pawn nearby. The board is checkered, and there are concentric circles in the background.

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Beyond the Course

Upon completion, participants will be able to use Excel as a powerful financial reporting, modeling, and decision-support tool. They will return ready to:

- Create fully automated financial dashboards.
- Develop flexible three-statement financial models.
- Build interactive budget variance analysis tools.
- Design dynamic executive summary reports.
- Automate repetitive financial reporting tasks.
- Transform raw financial data into clear, actionable business insights.

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

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