Applied Excel

Gain the skills for parsing, analyzing, and presenting information from large data sets. This one-day Applied Excel workshop is designed to improve the participant's ability to use Excel efficiently to interpret data by utilizing both basic and advanced Excel tools. Participants can dramatically improve their efficiency in data organization, allowing them to spend more time interpreting and sensitizing the data, creating more value to the project team and the client.

The course will start with Excel best practices and continue throughout the day to layer in more advanced Excel functionality focused on data manipulation and management.

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Applied Excel

WHO IS THIS COURSE FOR?

- Practitioners who would like to upskill to more intermediate and advanced Excel use
- Job functions which include importing, preparing, analyzing, and presenting data in Excel for business insights or internal/external reporting purposes
- Consultants who work with client data and utilize information for making recommendations
- Professionals in Financial Planning & Analysis (FP&A) groups that are responsible for aggregating and presenting information

PREREQUISITES

There are no prerequisites for this course. Participants only need to have the desire to learn.

SCHEDULE

9:00 am - 4:30 pm

1 hour lunch plus shorter breaks during the day

LEARNING OPTIONS

Our courses are available in both in-person and virtual classroom formats.

COURSE PRICING

Early Registration: **$1,150* per day**

Standard Registration: **$1,250 per day**

* register at least 30 days in advance
Additional discounts offered to existing clients
Group rates available

COURSE CALENDAR

DETAILED SYLLABUS

Excel Best Practices, Data Manipulation, and Scenario Analysis

Excel Best Practices:
- Basic Excel setup including iterations & calculations settings
- Excel Best Practices, including common "shortcut" keys and other efficiency tips
- Best practices for building formulas (auto sum, filling, anchoring)
- Customizing toolbars in Excel (including adding icons to your toolbar)

Working with Client Data:
- Text to columns
- Text functions within Excel: LEFT, RIGHT, UPPER, LOWER, CONCATENATE

Analyzing Data:
- Lookup functions (XLOOKUP, VLOOKUP, HLOOKUP)
- INDEX and MATCH Functions
- Pivot Tables
- Analyzing data using SUMIF, COUNTIF, SUMPRODUCT and Nested IF functions

Scenario Analysis:
- Sensitivity analysis including data tables
- Scenario analysis using CHOOSE & OFFSET functions
- Conditional formatting
- Utilizing "named" cells

Introduction to Graphing and Visualizations:
- Introduction to Excel Charts
- Basic functionality of charts

All participants receive a certificate of completion

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