Advanced Excel Course Syllabus for Finance and Business

This advanced Excel course is designed for finance and business professionals looking to enhance their data analysis, reporting, and automation skills. The course includes practical case studies and learning outcomes for each module to ensure job-ready skills.

Module 1: Advanced Formulas and Functions

- Logical Functions: IF, AND, OR, IFERROR, Nested IF

- Lookup Functions: VLOOKUP, HLOOKUP, INDEX, MATCH

- Math Functions: SUMIFS, COUNTIFS, AVERAGEIFS, SUMPRODUCT

- Financial Functions: NPV, IRR, PMT, XIRR, XNPV

- Text Functions: CONCATENATE, TEXT, LEFT, RIGHT, MID

- Date and Time Functions: DATE, EOMONTH, TODAY, NETWORKDAYS

Learning Outcomes:

- Master advanced Excel formulas for financial modeling and analysis.

- Build complex logic using nested IF and lookup functions.

- Analyze large datasets using conditional and logical operations.

Case Study: Automating Financial Reports with Advanced Formulas

In this case study, participants will automate a quarterly financial report using advanced Excel formulas such as SUMIFS, IFERROR, and VLOOKUP. They will create dynamic reports that automatically update as data changes.

Module 2: Financial Modeling and Analysis

- Building Financial Models: Cash Flow, Profit & Loss, Balance Sheets

- Scenario and What-If Analysis: Data Tables, Scenario Manager, Goal Seek

- Forecasting Techniques: Trend Analysis, Regression Models, Projections

- Sensitivity and Break-even Analysis: Advanced financial modeling for risk management

Learning Outcomes:

- Create comprehensive financial models including cash flow and P&L statements.

- Use scenario and what-if analysis to evaluate financial performance.

- Develop forecasting models for financial planning.

Case Study: Developing a Financial Model for Investment Analysis

In this case study, participants will build a financial model for evaluating a new investment. They will apply scenario analysis to assess market changes' impact on projected revenue and costs.

Module 3: Data Visualization and Reporting

- Creating Advanced Charts: Line, Bar, Pie, Combo Charts

- PivotTables and PivotCharts: Data summarization and interactive dashboards

- Conditional Formatting: Data Bars, Color Scales, Icon Sets

- Building Dynamic Dashboards: Using Form Controls, Slicers, and PivotTables

Learning Outcomes:

- Design dynamic and visually appealing dashboards for reporting.

- Use PivotTables and charts to summarize and present data.

- Master conditional formatting to highlight data trends and outliers.

Case Study: Building a Dynamic Business Dashboard

Participants will create a real-time business performance dashboard using Excel PivotTables, Slicers, and Charts. The dashboard will dynamically update as new data is added.

Module 4: Automation and Macros in Excel

- Introduction to Macros: Recording, editing, and running Macros

- VBA Basics: Writing VBA code for automation

- Automating Reports: Creating repeatable processes

- Error Handling in VBA: Debugging and managing errors

Learning Outcomes:

- Learn to automate Excel tasks with Macros and VBA.

- Create workflows for automating reports.

- Develop interactive Excel tools using forms and VBA.

Case Study: Automating Financial Forecasts with VBA

In this case study, participants will automate a financial forecasting process using VBA to reduce manual effort and increase reporting accuracy.

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