

Advanced Excel Skills for Business and Financial Analysis

Boston, Massachusetts (USA)

10 - 14 November 2025

UK Training

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Advanced Excel Skills for Business and Financial Analysis

Code: FA28 From: 10 - 14 November 2025 City: Boston, Massachusetts (USA) Fees: 5700 Pound

Introduction

The "Advanced Excel Skills for Business and Financial Analysis" course is crafted to empower participants with essential Excel skills for data manipulation, complex financial calculations, dynamic modeling, and insightful reporting, tailored to drive strategic decision-making in business. Through practical exercises and real-world applications, participants will learn advanced techniques for data analysis, visualization, and creating dynamic models that add substantial value to their organizations.

Course Objectives

- Master advanced Excel functions and formulas for business analysis.
- Develop proficiency in financial modeling and forecasting techniques.
- Gain hands-on experience in building dynamic dashboards and reports.
- Learn data analysis and visualization techniques to uncover insights.
- Understand best practices for structuring and organizing Excel workbooks efficiently.

Course Outlines

Day 1: Advanced Excel Functions and Formulas

- Advanced nested functions and array formulas
- Lookup and reference functions VLOOKUP, HLOOKUP, INDEX, MATCH
- Logical functions IF, AND, OR
- Text functions for data manipulation
- Date and time functions
- Statistical functions for analysis

Day 2: Financial Modeling and Analysis

- Building financial models for forecasting and budgeting
- Sensitivity analysis and scenario modeling
- Discounted cash flow DCF analysis
- Valuation techniques NPV, IRR
- Ratio analysis for evaluating financial performance

Day 3: Data Analysis and Visualization

- PivotTables and PivotCharts for data summarization and analysis
- Data validation and conditional formatting
- Advanced charting techniques combo charts, sparklines

A graphic of a chessboard with several chess pieces (a king, a queen, a rook, and a knight) positioned on it. The board is white and black, and the pieces are gold and silver. The text 'UK Training PARTNER' is overlaid on the right side of the board.

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- Principles of interactive dashboard design
- Visualizing trends and patterns in data

Day 4: Automation and Efficiency

- Automating tasks with Macros and VBA programming
- Creating custom functions and user-defined formulas
- Techniques for data importing and exporting
- Optimizing workbooks for performance
- Collaboration and sharing features in Excel

Day 5: Real-World Case Studies and Projects

- Analyzing financial statements and business performance
- Forecasting sales and revenue based on historical data
- Building dynamic financial models for scenario analysis
- Creating interactive dashboards for executive reporting
- Presenting findings and recommendations effectively

Conclusion

Upon completing this course, participants will achieve mastery in advanced Excel skills for business and financial analysis, enabling them to analyze financial data, design dynamic dashboards, and build financial models to meet modern organizational demands. They will also learn to streamline workflows through automation and enhance Excel workbook efficiency for impactful, strategic reporting that supports decision-making at all levels.

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