

Advanced Excel for Planning, Forecasting & Budgeting Skills

Finance, Accounting, Budgeting
Orlando, Florida (USA)
17 - 21 Nov 2025

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Advanced Excel for Planning, Forecasting & Budgeting Skills

Ref: 3318_135138 **Date:** 17 - 21 Nov 2025 **Location:** Orlando, Florida (USA) **Fees:** 5700 Euro

Course Description

This comprehensive 5-day course equips finance professionals with advanced Excel skills for planning, forecasting, and budgeting. Participants will learn to create sophisticated financial models, perform sensitivity analysis, and optimize decision-making processes using Excel's powerful features.

Learning Objectives

- Develop advanced Excel skills for financial modeling and analysis
- Create dynamic budgets and forecasts using advanced Excel functions
- Implement sensitivity analysis and scenario planning techniques
- Optimize financial decision-making through data-driven insights
- Enhance reporting capabilities with advanced Excel visualization tools

Course Modules

Day 1: Advanced Excel Functions for Financial Modeling

- Advanced lookup functions INDEX, MATCH, OFFSET
- Array formulas and dynamic ranges
- Data validation and error checking
- Financial functions NPV, IRR, XNPV, XIRR

Day 2: Building Dynamic Budgets and Forecasts

- Creating flexible budget templates
- Rolling forecasts and driver-based models
- Scenario analysis using Data Tables
- Variance analysis and reporting

Day 3: Sensitivity Analysis and Risk Assessment

- One-way and two-way sensitivity analysis
- Monte Carlo simulation basics
- Goal Seek and Solver for optimization
- Building tornado charts for risk visualization

Day 4: Advanced Forecasting Techniques

A graphic of a chessboard with several chess pieces, including a king, queen, and pawns, arranged on the board. The text 'UK Training PARTNER' is overlaid on the image.

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- Time series analysis and trend forecasting
- Regression analysis for predictive modeling
- Moving averages and exponential smoothing
- Combining forecasts for improved accuracy

Day 5: Data Visualization and Reporting

- Advanced charting techniques
- Creating dynamic dashboards
- PivotTables and PivotCharts for analysis
- Automating reports with macros

Practical Wins for Participants

- Create flexible, error-free financial models
- Implement data-driven forecasting techniques
- Perform advanced sensitivity analysis for risk assessment
- Develop visually appealing and insightful financial reports

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

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