

# Next Generation Excel Advanced Business Financial Reporting

25 – 29 January 2027  
London (UK)

UK Training

# PARTNER

A photograph of chess pieces on a checkered board. In the foreground, a large gold king piece stands prominently on a dark square. To its left, a silver pawn piece sits on a light square. Further back, another silver pawn piece is visible on a light square. The background features a series of concentric, light gray circles that create a sense of depth and focus on the king piece.

## Next Generation Excel Advanced Business Financial Reporting

**Ref:** 322041\_182269 **Date:** 25 – 29 January 2027 **Location:** London (UK) **Fees:** 5400 GBP

### Why This Course

Excel remains one of the most powerful tools for business analysis and financial reporting. However, many professionals only use a small portion of its capabilities, missing opportunities to automate processes, analyze large datasets, and present insights more effectively. Mastering advanced Excel techniques enables professionals to transform raw data into meaningful insights that support faster and more informed business decisions.

This intensive 5-day program is designed to help participants elevate their Excel skills for advanced business and financial analysis. The course focuses on data modeling, automation, forecasting, and dynamic reporting techniques that improve efficiency and analytical accuracy. Through practical exercises and real-world applications, participants will gain the confidence to build powerful models, automate repetitive tasks, and create interactive dashboards for decision-makers.

### What You'll Learn and Practice

By participating in this program, you will:

- Build advanced Excel models for business and financial analysis.
- Apply data cleansing and transformation techniques for reliable reporting.
- Design interactive dashboards and visualizations for financial insights.
- Automate reporting workflows using Excel tools and macros.
- Apply advanced formulas and analytical functions for complex calculations.
- Improve the accuracy and efficiency of financial reporting processes.

### The Program Flow

#### Day 1: Advanced Data Analysis and Modeling

- Structuring and normalizing complex datasets.
- Using advanced lookup functions such as INDEX-MATCH and XLOOKUP.
- Implementing data validation and error-checking techniques.
- Building flexible and scalable financial models.

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A graphic of a chessboard with several chess pieces (a king, a queen, a rook, and a pawn) 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 board.

## **Day 2: Financial Reporting and Forecasting**

- Creating dynamic financial statements in Excel.
- Developing advanced budgeting and forecasting models.
- Performing scenario and sensitivity analysis.
- Applying Monte Carlo simulation techniques for risk analysis.

## **Day 3: Data Visualization and Dashboard Creation**

- Creating advanced charts for financial analysis.
- Designing interactive dashboards for business reporting.
- Using Power Query for efficient data transformation.
- Building KPI scorecards for performance monitoring.

## **Day 4: Automation and Efficiency**

- Automating reporting tasks using VBA macros.
- Analyzing large datasets with Power Pivot.
- Automating data import and refresh processes.
- Creating custom Excel functions to enhance model functionality.

## **Day 5: Advanced Financial Analysis**

- Applying valuation modeling techniques.
- Developing models for mergers and acquisitions M&A analysis.
- Understanding leveraged buyout LBO modeling basics.
- Calculating advanced financial ratios and performance metrics.

## **Individual Impact**

- Strengthen advanced Excel and data analysis skills.
- Improve efficiency in financial modeling and reporting tasks.
- Gain confidence in building complex analytical models.
- Develop the ability to present financial insights clearly through dashboards.

## **Work Impact**

- Improve the quality and accuracy of financial reports and analysis.
- Enhance organizational decision-making through better data insights.
- Reduce manual work through automation and efficient workflows.
- Support strategic planning with advanced financial modeling tools.

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

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## Training Methodology

This program emphasizes hands-on learning to ensure participants gain practical Excel expertise. Training methods include:

- Interactive demonstrations and guided Excel exercises.
- Real-world case studies in business and financial analysis.
- Step-by-step model-building workshops.
- Dashboard creation and visualization activities.
- Practical templates and tools for advanced Excel reporting.

## Beyond the Course

By the end of the program, participants will be able to:

- Build advanced Excel models for financial analysis and forecasting.
- Automate reporting processes and improve operational efficiency.
- Create interactive dashboards and KPI reports.
- Apply advanced financial analysis techniques to support strategic decision-making.

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

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