Advanced Business & Financial Reporting with Excel Mastery

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Los Angeles (USA)

UK Traininig
PARTNER



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Why This Course

Excel remains one of the most powerful tools for finance professionals, especially when it comes to financial analysis, reporting, forecasting, budgeting, and decision support. When used effectively, Excel can transform raw financial data into clear insights, dynamic dashboards, automated reports, and reliable financial models.

Many finance teams use Excel daily, but often only at a basic level. Advanced Excel skills allow professionals to work faster, reduce errors, analyze larger datasets, automate repetitive tasks, and present financial information in a more professional and decision-ready format.

This comprehensive 1-week course equips finance professionals with advanced Excel skills for creating sophisticated business and financial reports. Through hands-on practice, real-world financial scenarios, model-building exercises, dashboard development, and automation techniques, participants will learn how to build dynamic, accurate, and visually effective financial reports that support better business decisions.

What You'll Learn and Practice

By joining this program, you will:

- Develop advanced Excel skills for financial modeling and analysis.
- Use complex financial functions such as NPV, IRR, XNPV, and XIRR.
- Apply advanced lookup functions including INDEX-MATCH and XLOOKUP.
- Work with array formulas and dynamic arrays.
- Use Power Query to clean, transform, and prepare financial data.
- Build integrated three-statement financial models.
- Apply sensitivity analysis and scenario planning.
- Develop valuation models using DCF and comparable company analysis.
- Use PivotTables, PivotCharts, Power Pivot, and DAX for financial reporting.
- Create KPI dashboards and executive-level reports.
- Apply advanced data visualization techniques.
- Build interactive dashboards using form controls.
- Use conditional formatting, sparklines, and data bars to highlight trends.
- Automate reporting processes using VBA macros.
- Build dynamic report templates with validation and error-checking controls.



The Program Flow

Day 1: Advanced Excel Functions for Financial Analysis

- Advanced Excel principles for finance professionals.
- Complex financial functions: NPV, IRR, XNPV, and XIRR.
- Advanced lookup functions: INDEX-MATCH and XLOOKUP.
- Array formulas and dynamic arrays.
- Power Query for data cleaning, transformation, and preparation.
- Structuring workbooks for accuracy, flexibility, and ease of review.
- Practical exercise: Preparing financial data using advanced formulas and Power Query.

Day 2: Financial Modeling Techniques

- Building three-statement financial models.
- Linking income statement, balance sheet, and cash flow statement.
- Sensitivity analysis and scenario planning.
- Valuation models, including discounted cash flow and comparable company analysis.
- Monte Carlo simulation basics for risk analysis.
- Building flexible assumptions and model drivers.
- Workshop: Developing a flexible three-statement financial model.

Day 3: Data Analysis and Business Intelligence

- PivotTables and PivotCharts for financial reporting.
- Using PivotTables to summarize, analyze, and present large financial datasets.
- Power Pivot for data modeling.
- DAX for advanced calculations and financial measures.
- Creating KPI dashboards.
- Designing reports that support management decision-making.
- Practical exercise: Building a financial KPI dashboard using business intelligence tools in Excel.

Day 4: Advanced Data Visualization

- Custom chart types for financial data.
- Selecting the right visual format for financial reports.
- Interactive dashboards using form controls.
- Conditional formatting for data presentation.
- Sparklines and data bars for trend analysis.
- Designing executive-friendly visual summaries.
- Workshop: Creating an interactive budget variance analysis dashboard.



Day 5: Automation and Reporting Best Practices

- VBA macros for report automation.
- Automating repetitive reporting tasks.
- Building dynamic report templates.
- Data validation and error checking.
- Best practices for financial report design.
- Improving accuracy, readability, and professional presentation.
- Final activity: Designing a dynamic executive summary report and automated financial dashboard.

Individual Impact

- Strengthen your advanced Excel capability for finance and reporting tasks.
- Improve confidence in building financial models and dashboards.
- Reduce manual work through automation and better data handling.
- Enhance your ability to analyze complex financial data.
- Improve report accuracy, structure, and presentation quality.
- Gain practical skills that can be applied immediately in daily finance work.

Work Impact

- Improve the quality and speed of financial reporting.
- Support better decision-making through clearer dashboards and financial insights.
- Reduce errors in financial models and reports.
- Improve budgeting, forecasting, variance analysis, and performance reporting.
- Increase efficiency through automation and reusable reporting templates.
- Strengthen finance team capability in data analysis and business intelligence.

Training Methodology

This program uses a practical and hands-on approach focused on real financial reporting and modeling scenarios. Participants will work directly in Excel throughout the course and build tools they can adapt to their own workplace needs. Learning methods include:

- Guided Excel demonstrations and hands-on practice.
- Financial modeling workshops.
- Formula-building and data transformation exercises.
- PivotTable, Power Pivot, and DAX activities.
- Dashboard design and visualization practice.
- Budget variance and KPI reporting case studies.
- VBA automation exercises.
- Peer review, facilitator feedback, and practical reporting projects.



Beyond the Course

Upon completion, participants will be able to use Excel as a powerful financial reporting, modeling, and decision-support tool. They will return ready to:

- Create fully automated financial dashboards.
- Develop flexible three-statement financial models.
- Build interactive budget variance analysis tools.
- Design dynamic executive summary reports.
- Automate repetitive financial reporting tasks.
- Transform raw financial data into clear, actionable business insights.

