

## **Course Modules**

### **Essentials**

- The Ribbon what's in there, what's important, what's secondary.
- Working fast in Excel Quick navigation and top keyboard shortcuts.

### **Functions**

- > Overview of the Function Library.
- ➤ In depth most useful functions and their application: INDEX, MATCH, INDEX & MATCH vs VLOOKUP, XLOOKUP, SUMIFS, SUMPRODUCT, COUNTIFS, MAX & MIN, RANK, IF, AND, OR, TRUE & FALSE.

### **Formulae**

- > Formula construction building formula involving multiple functions.
- > Formula auditing tools navigating your calculations and finding errors.
- Range names how to create, use and edit.

### **Data & Analysis Tools**

- Pivot Tables how to create, use and customise.
- ➤ What-If tools Goal Seek to find inputs, Data Tables to sensitise inputs.
- > Techniques for creating scenarios and flexing inputs.

### **Formatting**

- > Importance of formatting your spreadsheets.
- > Cell styles their use and customising.
- Conditional formatting of outputs.

### **Views**

- Presenting the data you want through Sorting & Filtering.
- > Improving the look of work through Freeze Panes, Grouping & Hiding.
- > Data Validation to make your spreadsheet more robust & usable.

### What isn't covered

- > VBA and Macros.
- > Charts, graphs and graphical representations.

# Course objectives & format

### **Course objectives**

- > Gain broad, advanced, commercially-orientated knowledge of Excel suited to Accounting & Finance, Analyst, Consultant and Strategy positions, as well as other roles with a commercial focus.
- > Be able to apply in multiple ways the most useful and relevant Excel functions to your analysis and spreadsheets.
- > Learn how to construct formula containing multiple functions.
- > Utilise a range of inbuilt Excel tools in your data analysis and work.
- > Be able to format your work to look professional and presentable.
- > Extend your knowledge of Excel functionality relevant to analysis.
- Increase the speed with which you work in Excel and produce analysis.

### **Format**

- ➤ Theory elements are taught through short video lectures, followed by video demos of the theory applied within Excel.
- High quality exercises are provided throughout to download and put your new knowledge into practice. These are set within a commercial context, making learning relevant, challenging and realistic.
- > All exercises are accompanied by a downloadable solution file, along with a comprehenive video of the solution.
- > Regular quizzes are provided to help test your knowledge along the way.

### This is for...

- > Intermediate users of Excel with some experience of building formulae and creating calculations.
- > Those looking to produce analysis, reports and templates.
- Accounting & Finance professionals, Analysts, Consultants, Strategists and those in a commercial role, aiming to improve their knowledge of Excel, it's functionality, and it's useful application in commerciallyorientated positions.
- Those looking to take the first steps towards Excel modelling. Whilst this isn't specfically a modelling course, the content is prerequisite knowledge for the Excel Modeller course and modelling in general.

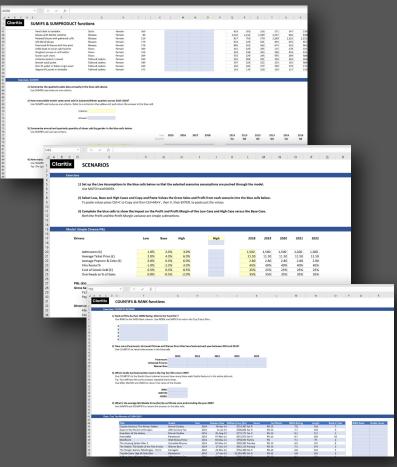
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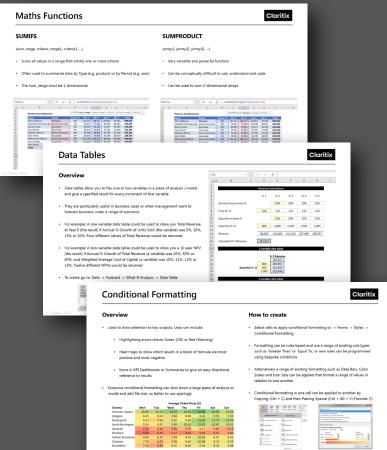
# **Content Examples**

### **Theory Based**

Theory is introduced by way of instructor-presented video lectures. These include thorough, descriptive explanation, and graphical examples.

Lectures are followed by comprehenisve and clear Excel demos that show how the theory is applied in a variety of ways.





### **Practical Based**

Thoughout the course, participants will put into practice the theory they have just learnt by downloading comprehensive and commercially-orientated exercises, supported by solution files and videos.

Additionally, regular quizzes are provided to further challenge and test your knowledge.

# FINANCIAL ANALYSIS EXPERTS

All Claritix courses are created by Dan Stockdale, a former PwC modeller and trainer who taught best practice modelling and Excel courses within the Firm. Dan also has a background in Finance teams across several industries, having worked in Commercial Analysis and Management Accounting. He qualified with the Chartered Institute of Management Accountants (CIMA) in 2010 and holds the ACMA and CGMA designations.

Our training courses are transformative. They have not been diluted down to go only halfway. They are broad and intensive, and expose participants to a wide range of Excel skills, as well as commercial knowledge, thinking and approach.

Practical experience in Finance, Analyst, Consulting and Strategy roles has been drawn upon to tailor content to include the most useful, powerful and relevant functionality that Excel provides, and omit the less so.

Participants can expect to leave the course with a step-change in applicable Excel knowledge. This aims to boost productivity, reduce risk in deliverables, and empower staff using the World's most prevalent and powerful business tool to add value in their work.