A2 High-Powered Excel for Finance

Learn from industry experts with insights from years of practical experience!

ACCESS ANALYTIC

Who Should Attend?

- Management Accountants
- Financial Accountants
- Cost Accountants
- Business Analysts
- Finance and Cost Analysts

Pre Requisites

This is a high-powered, advanced Excel course so participants should be suitably experienced.

Course Facilitator

Wyn Hopkins

Bachelor of Science (completed with Honours) in Accounting & Financial Management, Chartered Accountant (UK), Microsoft Certified Excel Expert

Wyn is a Senior Business Analyst with Access Analytic, an Australian consulting company that specialises in providing business analyst tools and services to companies that value financial expertise and need to make decisions with confidence.

Wyn has extensive experience in across a wide range of industries, ERP software and database systems, and has highly advanced skills in Excel and VBA macro programming to improve data analysis, management reporting, and the budgeting/forecasting processes.
He is an internationally qualified Chartered Accountant and is also an experienced and friendly communicator who specialises in training and presentations.

Wyn is highly experienced, having completed many successful projects for corporates of all sizes in areas such as:

- Budgeting and forecasting
- Financial modelling
- Board and Management reporting information packs
- Revenue/Cost data analysis and reporting
- Business process improvement and systems
- Project analysis and reporting
- Spreadsheet/database systems integration

Full-Day Course Outline

This hands-on course goes far beyond simply explaining Excel's features and functions - you'll learn how to apply these to get more done and **produce reliable, consistent, maintainable, user-friendly results**.

You'll literally gain the knowledge and skills you can use in your work every day to **transform your Excel work and make decisions with confidence**.

Included:

- Valuable, **time-saving techniques** to reduce re-keying of data and increase automation.

- **Key features every budget needs** to make it easy to maintain and easy to use.

- The **essential functions used by experts** to increase consistency and reduce data entry.

- **Clever range name techniques** that improve reliability and readability.

- **Best practices** for producing flexible and reliable lookups.

… and more

- Learn **Excel's hidden shortcuts** to many common tasks that can save you hours of time every day.

- Techniques to make maintenance easier and **make your models accurate, reliable and robust**.

- **Powerful data analysis and visualisation** techniques to identify trends and anomalies.

- **How and when to apply macros** that will speed up the creation of your models.

and ...

Question and answer time so you can get answers to all those questions that have been bugging you! ... plus many many more ways to improve your productivity and reduce your frustration!

Key Details

Class sizes are strictly limited to 7 or less to ensure maximum contact with the presenter.

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Course Outline Detail

Useful Techniques & Keyboard Shortcuts
- Control key
- Right click
- The Ribbon & the Quick Access Toolbar
- Options
- Referring to Cells & Ranges

Range Names
- Creating Range Names
- Range Name Box
- Creating Names Automatically
- Defining Names

Useful Functions in Finance
- COUNTIF
- INDIRECT
- AND, OR
- ROUND
- IF
- VLOOKUP
- AVERAGEIF
- SUMIF/ SUMIFS
- COUNTA
- MAX & MIN
- OTHER FUNCTIONS

Tables
- Creating a Table
- Table Functionality
- Flexible (Dynamic) Ranges
- Using INDIRECT with Tables

Pivot Tables and Pivot Charts
- Creating a Pivot Table
- Analysis with Pivot Tables
- Pivot Charts

Conditional Formats
- Preset Conditions
- Formula Driven Formatting
- Modifying Conditional Formats

Wrapping up with Ribbons

Appendices
1. Excel 2007 Standard Ribbons
2. Non-Standard Ribbons

Recent Feedback
- "It moved at a good pace and covered a lot of useful information", SM, Wesfarmers
- "Overall fantastic, well presented", SV, BDO
- "The course was excellent with very practical examples", MW, BQK Chartered Accountants
- "I genuinely found the course to be excellent!", LB, Webb & Brown-Neaves
- "Good notes; questions and answers very well handled", KL, Precise Business Solutions
- "Trainer - excellent, vibrant & knowledgeable", AR, Maunsell
- "Very relevant to my current role", JS, Scotch College

Continuing Education

This course has 7.5 contact hours towards continuing education requirements.