Webinar Business Analytics and Reporting (Excel)

i3BAR: Building sustainable Excel models

Details

Cursusduur

6 dagen

Datum en locatie

4, 6, 8, 11, 13, 15 oktober 2021 - Online

Tijd

08:30 - 12:00, 08:30 - 12:00, 08:30 - 12:00, 08:30 - 12:00, 08:30 - 12:00, 08:30 - 12:00

Prijs ex. btw

€ 1.350,00 (leden) / € 1.550,00 (niet-leden)

Kennisgebied

Performance Management, Finance Operations & Reporting, Online learning

Bestemd voor

Accountants in business, Overige financieel professionals, Controllers

Niveau

Advanced

Finance in business

Datum en locatie

4, 6, 8, 11, 13, 15 oktober 2021 - Online

The course is in English and the Excel parts are based on the English version of Excel.
As an RC, you will receive the membership fee.

Inhoud

The i3BAR course teaches a proven methodology used by finance professionals worldwide, to build Excel based solutions for their reporting, sensitivity analysis, modelling and analytics. What makes the i3BAR course so different from other Excel training is that it's designed by finance professionals to tackle the core problems finance staff face in analytics and reporting:

- Working with multiple sources of often messy raw data formats and turning them into reports quickly, regularly and consistently with minimal manual effort.
- Providing models that are interactive for users to work with directly through buttons, selection boxes, sliders etc to make them easy, robust and safe from accidental error to use to explore and analyse data - both in table format (summary and detail level) and in charts.
- Separating data, logic and reporting sections, with structure and linking to facilitate easy and safe maintenance and model development over time and which have a logic structure and method that enable them to be transferred to others to take over.
- Having user controllable buttons and selection to drive sensitivities and modelling and what if analysis - so that sensitivities, what if analysis and budget modelling can be carried out by the user directly or in workshops so that the process is faster, lower risk, more flexible. As this sensitivity/ modelling logic is built into the structure, it doesn't require the model builder to rework the model for these sensitivities or what ifs to be run - just for someone to modify the prebuilt parameters with the interactive controls. This saves time, reduces risk of modelling errors and avoids a lot of the typical pressures and stresses of this process!
- Reducing the size and improving the speed of Excel models by more use of more efficient formulae and structure so that larger and more sophisticated models can be safely built and used.

Because i3BAR teaches a method, it does not rely on participants using fixed format templates - they can use the method to create the models they need to solve their own needs. It does not use plugins or anything other than standard Microsoft Excel.

Doelstelling

Learning objectives
Participants will learn how to:

- Build models that automate the process from new data to report generation to reduce reporting time from days to minutes.
- Integrate data from disparate data sources into Excel for more sophisticated metrics and reports.
- Build reliable and sustainable excel-based reporting models to make new data sources/ reports/ new workings easier and safer to create.
- Construct interactive models removing the risks of users overwriting/ breaking models and enabling interactive real time sensitivity work or creating models for users to do their own sensitivity modelling.
- Reduce the size and increase the speed of models, reducing the risk of crashes and problems and making larger more sophisticated models possible.
- Apply techniques to design and build models to solve their own problems.

Inhoud

Course outline
The course is conducted in a highly participative workshop style, with participants working through a complete case study from raw data to finished automated reporting and building a budget sensitivity model. Each stage of the case study builds on the previous one and includes the completed solution to the previous stage Í enabling easy options to practice/ revise concepts. In addition, several revision exercises are built into the course where participants practice what they have learnt.

The course is structured as follows into six sessions, each session is three hours long:

Session 1: Introduction to i3BAR Structure and Stage 1 (model building) method
Session 2: Completing the Stage 1 foundation. Interactive data tables and charts
Session 3: Stage 2: Bridging - updating reports in seconds with your updated data
Session 4: More advanced techniques, and the power of creative combinations
Session 5: Budgeting and sensitivity analysis
Session 6: Pulling it all together and building your own models

More information on the content of each session

Pre-course learning
Practice files for participants to work on the key Excel functions needed for the course, this ensures that participants can focus during the sessions on key principles such as model structure and work on applying the techniques in the case study exercises straight away.

In between sessions
Participants will be able to practice the new techniques between sessions and ask for help if needed in extra time at the end of a session, or after the course if they need it.

Optional post course project
To apply the ideas learnt to build an Excel model for the participant's organization that demonstrates the core techniques taught in the course either to build an interactive reporting model with rapid data updating or a model with interactive data simulation and sensitivity analysis. Successful completion will earn a certificate of competency in Business Analytics and Reporting from the Institute of Business Analytics.

Bestemd voor

This course is for accounting, finance and other business professionals who want to build robust reliable and scalable Excel models for reporting, analytics and simulation.

Companion course
The companion course Webinar Visual Analytics & Dashboard Design (Excel i2VSA) is recommended for participants who want to learn how to cut through typical information overload, identify what critical information is needed and how to best create and present actionable information and insights.

Docenten

Simon Lindley

Simon Lindley is an international trainer, speaker and consultant in business transformation through analytics, working across Asia, Europe and North America. Simon is a Chartered Accountant, Chartered Engineer (IT) and MBA with a Masters diploma in corporate governance. He also has training and qualifications in statistics and data science.

Locatie

De cursus vindt plaats in E-learning in Online

Adres

E-learning

0

Online