

Webinar Business Analytics and Reporting (Excel)

i3BAR: Building sustainable Excel models for rapid reporting, interactivity and sensitivity analysis/ budget modelling

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

Covering data structure, separation of logic and presentation sections and other key elements, the data reporting and update process, first steps in building interactive reports.

Session 2: Completing the Stage 1 foundation. Interactive data tables and charts

Interactive data selection for reporting tables. Dealing with master data and calculation/ logic blocks for easy maintenance and flexibility.

Session 3: Stage 2: Bridging – updating reports in seconds with your updated data

Extending interactivity to creating dynamic charts and visuals. Structure and techniques to enable automatic updating of all reports in seconds with new data. Building error checks and controls into the model.

Session 4: More advanced techniques, and the power of creative combinations

Examples of some of the more advanced techniques and approaches that can be built. These can be used directly or as inspiration for how participants can analyse and solve their own business problems with creative combination of the techniques taught.

Session 5: Budgeting and sensitivity analysis

Cost categories and modelling treatment, interactivity applied to cash flows, approvals, Capex, Revenue, HR and other simulation techniques. Creating models and process for interactive working through sensitivities and allowing users to select/ choose and model their own sensitivities with pre-built flexible models.

Session 6: Pulling it all together and building your own models

Core concepts revision, learning points for designing and building your own models – including how to complete the optional post course project as a supported first model. Showcase of models and problems solved by past participants (shown with their permission).

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.