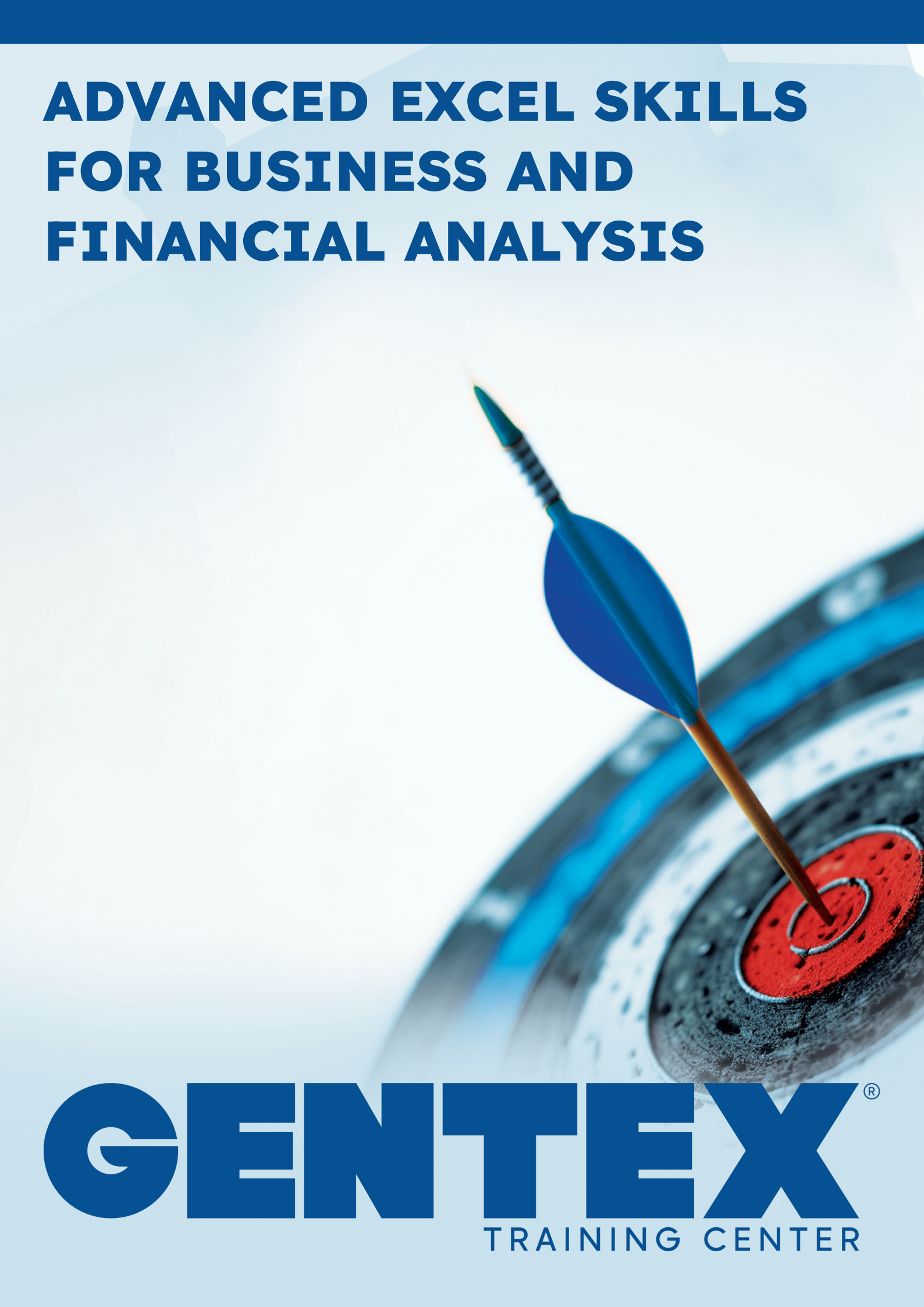
ADVANCED EXCEL SKILLS FOR BUSINESS AND FINANCIAL ANALYSIS



GENTEX®
TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com

Introduction

Advanced Excel Skills for Business and Financial Analysis Training Course builds the spreadsheet capability that modern analytical work demands. Excel remains the working language of finance, planning, and operations, yet most professionals use only a fraction of what the tool can do. That gap shows up in slow reporting, error-prone workbooks, and analysis that cannot answer a question quickly. This course closes it. It covers advanced formulas, functions, and data handling. Furthermore, it applies pivot tables, Power Query, dashboards, and financial modelling techniques. In addition, it covers automation, error prevention, and reporting design. As a result, participants turn raw data into reliable analysis and clear business insight.

Advanced Excel Skills for Business and Financial Analysis Course Objectives

- Apply advanced lookup, reference, and logical functions confidently.
- Use dynamic array functions including FILTER, SORT, UNIQUE, and XLOOKUP.
- Clean, transform, and combine data using Power Query.
- Build and manipulate pivot tables, slicers, and calculated fields.
- Design interactive dashboards with charts and form controls.
- Structure financial models with clear inputs, calculations, and outputs.
- Apply sensitivity analysis using data tables and scenario tools.
- Automate repetitive tasks using macros and VBA fundamentals.
- Prevent and detect spreadsheet errors through auditing techniques.
- Present financial analysis clearly using conditional formatting and reporting layouts.

Course Methodology

- Interactive lectures with practical business and finance datasets.

GENTEX® TRAINING CENTER

- Hands-on workbook building exercises in every session.
- Power Query, pivot table, and dashboard construction workshops.
- Financial modelling and sensitivity analysis practice.
- Structured peer review with facilitator feedback on workbook design.

Who Should Take This Course

- Financial analysts and business analysts.
- Accountants and management accountants.
- Budgeting and planning professionals.
- Operations, sales, and marketing analysts.
- Data and reporting specialists.
- Professionals who build or review spreadsheets regularly.

Advanced Excel Skills for Business and Financial Analysis Course Outlines

Day 1: Advanced Formulas and Functions

- Function categories and when to apply each.
- VLOOKUP, INDEX-MATCH, and XLOOKUP explained and compared.
- Logical functions: IF, IFS, AND, OR, and nested logic.
- Text functions for cleaning and combining data.
- Date and time functions for period analysis.
- Dynamic array functions: FILTER, SORT, UNIQUE, SEQUENCE.
- Case study: rebuilding a slow report with better formulas.

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com

Day 2: Data Management with Power Query

- Importing data from files, folders, and databases.
- Cleaning, splitting, and transforming columns.
- Merging and appending queries for consolidation.
- Unpivoting wide data into analysis-ready tables.
- Refreshing and automating recurring data pulls.
- Handling errors and changing source structures.
- Workshop: consolidating monthly files into one query.

Day 3: Pivot Tables and Dashboard Design

- Pivot table structure and source data requirements.
- Calculated fields, grouping, and value field settings.
- Slicers, timelines, and connected pivots.
- Chart selection for business and financial data.
- Dashboard layout, hierarchy, and visual clarity.
- Using form controls and dynamic ranges.
- Workshop: building an interactive financial dashboard.

Day 4: Financial Modelling in Excel

- Model structure: assumptions, calculations, outputs.
- Building integrated income statement and cash flow.
- Scenario switches, flags, and case management.
- Sensitivity analysis with data tables and tornado charts.
- Break-even and what-if analysis techniques.

GENTEX® TRAINING CENTER

- Model documentation and assumption tracking.
- Workshop: constructing a forecast and sensitivity model.

Day 5: Automation, Auditing, and Reporting

- Recording macros and editing VBA code basics.
- Automating report generation and formatting.
- Formula auditing, trace precedents, and error checking.
- Protecting sheets and controlling workbook access.
- Designing clean management reporting layouts.
- Conditional formatting for exception highlighting.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Advanced Excel Skills for Business and Financial Analysis, participants will gain a thorough understanding of advanced formulas, data transformation with Power Query, pivot tables and dashboards, financial modelling structure, sensitivity analysis, automation, and spreadsheet auditing. They will also acquire practical skills in advanced formula and function use, data cleaning and transformation, dashboard and report building, and financial modelling, sensitivity analysis and workbook auditing. In addition, the course prepares them to produce analysis that is fast, accurate, and easy to present. Gentex Training Center delivers this programme with a strong focus on hands-on practice and analytical accuracy.

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com

FAQs for Advanced Excel Skills for Business and Financial Analysis course

Q1 What is the "Advanced Excel Skills for Business and Financial Analysis" course about?

It is a five-day programme on using Excel for serious analytical work. It covers advanced formulas and lookup functions, dynamic arrays, Power Query data transformation, pivot tables and dashboards, financial modelling structure, sensitivity and scenario analysis, macros and VBA basics, and spreadsheet auditing.

Q2 What are the key benefits of the "Advanced Excel Skills for Business and Financial Analysis" course?

Participants cut reporting time, reduce spreadsheet errors, and answer analytical questions faster. The course improves data cleaning without manual effort, raises dashboard clarity for decision-makers, strengthens forecast and scenario testing, reduces reliance on outdated manual routines, and produces workbooks that are easier to hand over and review.

Q3 What skills will I gain from the "Advanced Excel Skills for Business and Financial Analysis" course?

Participants gain advanced formula and function application, data cleaning and transformation with Power Query, pivot table, dashboard and report building, and financial modelling, sensitivity analysis and workbook auditing. These four skills cover the practical core of advanced Excel work in business and finance.

GENTEX® TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com

Q4 What tools, methods, or standards are covered in the "Advanced Excel Skills for Business and Financial Analysis" course?

The course covers VLOOKUP, INDEX-MATCH and XLOOKUP, the IF, IFS, AND and OR logical functions with nested logic, text cleaning functions, date and time functions, dynamic array functions including FILTER, SORT, UNIQUE and SEQUENCE, Power Query import from files, folders and databases, column splitting and transformation, merge and append queries, unpivoting, query refresh automation, error handling, pivot table structure and calculated fields, grouping and value field settings, slicers, timelines and connected pivots, chart selection, dashboard layout and hierarchy, form controls and dynamic ranges, model structure with assumptions and outputs, integrated income statement and cash flow construction, scenario switches and flags, data tables and tornado charts, break-even and what-if analysis, model documentation, macro recording, VBA code editing, formula auditing with trace precedents, sheet protection and access control, management reporting layout design, and conditional formatting for exception highlighting.

Q5 How is the "Advanced Excel Skills for Business and Financial Analysis" course applied in real-world practice?

Participants apply the skills to their own workbooks and datasets. They rebuild slow reports with better formulas, consolidate monthly files through Power Query, clean and reshape messy data, build pivot tables and interactive dashboards, construct forecast and sensitivity models, automate recurring report preparation, audit formulas for errors, and design cleaner management reporting. Many leave with a dashboard template, a Power Query consolidation file, and a financial model starter ready to use.

GENTEX® TRAINING CENTER