



Introduction to Microsoft Financial Modelling + Excel And Analysis

Who Should Attend

This course is for business professionals with intermediate Excel skills or equivalent who want to advance their financial analysis abilities, particularly those in financial planning, business partnering, or related fields.

Format:

- Full-day instructor-led virtual classroom session

Tools Provided:

- Comprehensive Learning Guide
- Enrolment in our monthly LearningLink e-newsletter

Related Training:

- Excel Level 2 – Intermediate
- Data Visualisation with Excel and PowerPoint

Master Financial Modelling - Build models from scratch and generate key insights

Learn how to use relevant Excel tools (such as Lookups, macros, and range names) to create financial models and then use of this model to produce summary reports, and Key Performance Indicators (KPIs).

This course will help you:

- Build financial models from scratch in Excel
- Create integrated Excel models connecting the P&L, balance sheet, and cash flow
- Generate key reports and KPIs from your models
- Run scenario analysis using Excel's Scenario Manager and Pivot Tables
- Advance your Excel skills to get more value in financial analysis and planning roles.



Priority Management Training
 Email: Info@PriorityManagementTraining.ie
 Tel: +353 (0)1 584 6376
 Web: www.prioritymanagementtraining.ie

Synopsis:

Introduction to Financial Modelling and Analysis with Excel

Upon completing this course, you will have the skills to build robust and integrated financial models in Excel from scratch, using best practices in structure, formulas, and layout to create error-free models.

Model Fundamentals

- Model Design and Pitfalls
- Key variables and rules
- End result of the model
- The layout in designing an error-free financial models

Building the Model

- Sales
- Cost of Sales
- Payroll
- Overheads
- Fixed Assets
- Working Capital

Model Outputs

- Full master model available for download
- Key report generation (P & L, balance sheet, cash flow) from linked sheets.
- Compilation of operational KPIs including graphical representation where appropriate.
- Key reporting dashboard.

Scenario Testing

- The use of Scenario Manager
- Scenario reporting from model built per above.
- Adding, editing and deleting scenarios;
- Scenario reporting via Pivot Tables and worksheets.



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