

Excel for Finance Teams

Advanced Excel Skills for Modern Financial Professionals

4-Hour Professional Development Program

In today's data-driven business environment, finance professionals are expected to deliver accurate analysis, insightful reporting, and timely decision-making support. This intensive workshop equips finance teams with the advanced Excel techniques required to improve efficiency, strengthen data integrity, and enhance financial reporting capabilities.

Designed specifically for accounting and finance professionals, the course focuses on practical techniques that can be immediately applied to budgeting, forecasting, reconciliation, financial analysis, and management reporting.

Business Outcomes

- Improve the accuracy, consistency, and reliability of financial reporting
- Reduce time spent on repetitive calculations, reconciliation, and data preparation
- Strengthening spreadsheet governance, controls, and auditability
- Accelerate budgeting, forecasting, variance analysis, and month-end reporting
- Transform financial data into clear management insights and decision-ready reports
- Build team capability to use Excel automation and AI more effectively

Target Audience

This program is ideal for:

- Finance Managers
- Financial Controllers
- Accountants
- Assistant Accountants
- Management Accountants
- Payroll Professionals
- Accounts Payable and Accounts Receivable Teams
- Financial Analysts
- Business Analysts

Prerequisites

Participants should possess a working knowledge of Microsoft Excel, including basic formulas, workbook navigation, and data entry.

Program Objectives

Upon completion of this workshop, participants will be able to:

- Apply industry best practices for developing robust financial spreadsheets
 - Automate calculations and reduce manual processing using advanced formulas
 - Improve the accuracy and reliability of financial data
 - Reconcile and validate information efficiently
 - Analyse large volumes of financial data using PivotTables and reporting tools
 - Create professional management reports and dashboards
 - Leverage Microsoft Copilot to increase productivity and accelerate analysis
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Program Content

Financial Spreadsheet Design and Governance

Develop spreadsheets that are accurate, scalable, and easier to maintain.

Key Topics

- Financial spreadsheet design principles
- Workbook structure and organisation
- Spreadsheet governance and risk reduction
- Excel Tables and named ranges
- Common causes of spreadsheet errors
- Spreadsheet auditing best practices

Business Outcome

Reduce spreadsheet risk while improving consistency and maintainability.

Advanced Finance Formulas and Functions

Learn the functions that underpin effective financial analysis and reporting.

Key Topics

- SUM and SUBTOTAL
- SUMIFS and COUNTIFS

- AVERAGEIFS
- IF, IFS and IFERROR
- ROUND and ABS
- Financial date calculations
- Period-based reporting calculations
- Variance and exception analysis

Business Outcome

Automate repetitive calculations and improve reporting accuracy.

Reconciliation and Data Quality Management

Improve confidence in financial information through structured validation techniques.

Key Topics

- Data Validation
- Duplicate identification and removal
- Conditional Formatting for exception reporting
- Formula auditing techniques
- Trace Precedents and Dependents
- Error detection and correction

Business Outcome

Enhance data integrity and reduce manual reconciliation efforts.

Data Matching and Consolidation

Efficiently combine and reconcile information from multiple financial systems.

Key Topics

- XLOOKUP
- VLOOKUP
- INDEX and MATCH
- Matching supplier and customer records
- Cross-referencing ledger information
- Consolidating datasets from multiple sources

Business Outcome

Significantly reduce the time required for matching and reconciliation activities.

Financial Analysis and Reporting

Convert transactional data into meaningful business intelligence.

Key Topics

- Sorting and advanced filtering
- Excel Tables
- Grouping and Subtotals
- PivotTables
- PivotCharts
- Budget versus Actual analysis
- Trend analysis and performance monitoring

Business Outcome

Deliver more insightful analysis and support informed decision-making.

Executive Reporting and Dashboard Development

Present financial information in a concise, professional, and visually compelling format.

Key Topics

- Financial dashboard design
- Key Performance Indicators (KPIs)
- Management reporting techniques
- Conditional Formatting for executive reporting
- Financial visualisation principles
- Chart selection and design

Business Outcome

Communicate financial performance effectively to management and stakeholders.

Productivity and Automation Techniques

Increase efficiency through Excel features designed to streamline routine tasks.

Key Topics

- Flash Fill
- Quick Analysis Tools
- Paste Special
- Text to Columns
- Workbook linking

- Essential keyboard shortcuts
- Time-saving reporting techniques

Business Outcome

Reduce administrative effort and maximise productivity.

Microsoft Copilot for Finance

Explore how Artificial Intelligence is transforming financial analysis and reporting.

Topics Covered

- Natural language formula creation
- AI-assisted financial analysis
- Automated report summarisation
- Trend identification
- Forecasting and scenario analysis
- Productivity opportunities for finance teams

Business Outcome

Understand how AI can support faster, more informed financial decision-making.

Learning Approach

This workshop is highly interactive and combines:

- Instructor-led demonstrations
- Hands-on practical exercises
- Real-world finance scenarios
- Financial reporting case studies
- Guided discussion and best-practice recommendations

Participants work with financial datasets and report examples that mirror common workplace situations.

Included with the Program

- Comprehensive course workbook
- Exercise files and datasets
- Practical finance templates
- Quick reference guides
- Certificate of Completion

Delivery Options

Duration: 4 Hours

Cost: \$450+GST per person

Delivery Format: In-Person or Live Online

Level: Intermediate to Advanced

Class Size: Small group or private corporate delivery

Business Benefits

Organisations investing in this program can expect to:

- Improve reporting accuracy
- Reduce manual effort and spreadsheet rework
- Strengthen financial controls
- Enhance analytical capability within finance teams
- Increase productivity through automation and AI
- Improve decision support and management reporting

Software Solutions

Empowering Finance Teams with Advanced Microsoft Excel Skills

Professional training designed to help finance professionals work more efficiently, analyse data more effectively, and deliver greater business value through informed financial insight.