

# Advanced Financial Modeling and Visualization



Advanced Financial Modeling Program will help you understand the advanced techniques to quickly audit the robust models, advanced excel tools to build flexibility in the models, advanced application of functions in executing nitty-gritties of models, and advanced sensitivity, optimization, & charting techniques.

## Coverage

**Advanced Excel Level I:**  
Database Structuring & Design  
**Advanced Excel Level II: Advanced**  
Financial Modeling and Visualization

## Objective

To empower professionals and executives with advanced skills and techniques to produce first-class financial models, compelling financial dashboards and automate your reporting process.

## Course Prerequisites

There is no prior knowledge required to attend this workshop for we give our learners a ground up approach.



### How you will benefit

1. Financial models will enable you manipulate data to understand risks unique to your business and how they affect your overall strategy.
2. You will be able to build dynamic dashboards relating your model to different reports to give the bigger picture.
3. Professionals will build captivating visualizations of their models and other data points to unearth what is hidden in your data on basis of the 10-second rule.
4. Professionals will reduce errors of data entry in their worksheets by more than 90%.
5. Downtime for producing reports will reduce by 81%
6. Learn the best practices of building financial models and laying corporate dashboards.

### Who should attend?

1. Finance and Audit professionals with keen interest in budgeting, aging, portfolio analysis, risk assessment and producing reports.
2. Managers and Executives who monitor and are required to produce reports and dashboards to present to their teams and board members.
3. Risk Management Professionals looking to develop robust risk assessment models, looking for areas to mitigate risk and potential grounds to leverage.
4. Decision makers who look to drive their process by data-driven methods rather than hearsay.
5. Entrepreneurs looking to assess investment decisions, prepare financial proposals and project future returns based on historical data.
6. Human Resource Professionals looking to build dynamic models in generating payrolls, staff lists and performance assessments.
7. Operational Professionals looking to assess performance of key departments, branches and regions



## Training Program

### Day One

#### Introduction to Modeling, Validation and Security

- i. Improve worksheet security and reducing unnecessary leakages
- ii. Reduce Errors of Data Entry
- iii. Introduction to guiding systems and deployment
- iv. Introduction to dynamic lists
- v. Shortcuts and Hacks

#### Financial Normalization and Design

- vi. Building dynamic lists and trackers
- vii. Company style template handling
- viii. Invoicing and Guiding system Implementation
- ix. One dimensional financial analytics
- x. Model structuring and organization

### Day Two

#### i. Corporate Syntax and Dynamics

- ii. Understanding referential integrity
- iii. Model Audit tools to uncover anomalies, errors and mix-ups
- iv. Advanced business functions, formulas and logical syntax
- v. Developing dynamic payroll systems for your entity
- vi. Currency correction and manipulation syntax
- vii. Building automated dynamic billing solutions
- viii. Corporate Modeling and Financial Solutions
- ix. Determining loan capacity of your organization, when to borrow and how much to negotiate
- x. Dynamic risk solution development
- xi. Amortization, depreciation and investment stress testing
- xii. Building a dynamic three-statement financial model
- xiii. Variance and scenario analysis for budgets, and financials

- xiv. Investment appraisal and model application
- xv. Three-Dimensional Business Models
- xvi. Financial Model Analysis with Pivot Tables
- xvii. Building robust FMCG models Highlighting Key Business Threads in Your Model
- xviii. Analytics and Pivots

### Day Three

#### Reports and Dashboard Automation

- i. Integrating your reports with dynamic features for perspective.
- ii. Developing models for benchmarking actual results to KPIs
- iii. Building geospatial visuals for territorial business analytics
- iv. Building configurable models to enhance report presentation
- v. Introduction to macros and macro security
- vi. Developing an automated reporting solution

#### Resource Optimization and Scheduling

- vii. Understanding What-If Analysis
- viii. Stress testing risk and investment models
- ix. Scenario analysis of corporate reports
- x. Optimization of supply chain dynamics and capital budgeting
- xi. Developing models to minimize staff scheduling costs
- xii. The montecarlo simulation to assess investment value.

### Book your slot now

You can register for the training on: [www.summitcl.com/beyondexcel](http://www.summitcl.com/beyondexcel) or call us on **+256 784 270519** You can also e-mail us on **catherinek@summitcl.com** for further queries on the training.





## About Summit Consulting

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All this training was (is) conducted by experienced data analytics experts who provide real-life case studies on your data and provide on-going support to companies whenever need be.