



# AREEF ALI & ASSOCIATES BUSINESS SOLUTIONS



*presents an intensive, instructor led program.*

**Tue 23<sup>rd</sup>, Wed 24<sup>th</sup> & Fri 26<sup>th</sup> June 2024**

## Excel Secrets & Techniques in Management Reporting

**Get the newest tips &  
tricks to stay ahead!**

Attend virtually or check us  
for a private session for your  
team!

### Facilitators

Joseph Alexander BSc, MBA, MCT

Shakeel Hosein BSc, MSc, MCT

Areef Ali BSc, FCCA, CA, MBA, MCT

### Contact for inquiries or private group training sessions:

Mr. Areef Ali

(868)-788-7538

[excelsem@aaa-bsol.com](mailto:excelsem@aaa-bsol.com)



[Click here to register](#)



## What participants say after attending our MS Excel training sessions...

"Areef was an excellent facilitator. Made everything simple, was willing to repeat steps and processes. Gave a lot of practical examples and encouraged us to speak about or bring to him our own practical examples and advised what can be done to improve same" VS

"Excellent all round...." DH

"Astonishing and Empowering..." WW

"Once again Areef has delivered a wonderful course that meets the demands of today's business world. Concise, relevant & powerful..." AB

"Great seminar. Excellent facilitator. Generally, a very informative course" AA

"Excellent seminar. Facilitator is extremely knowledgeable great teaching application etc" KH

"Both seminar + facilitator were excellent!" SR

"Great facilitator Great seminar I strongly recommend" RV

"This course is the best course I have attended." MT-G

"Exceeded my expectations re the level of time savings and smart short cut tools shown. Extremely value adding..." DL

"The sessions were well taught and delivered to expose us to the range of possibilities of Excel. A job well done! Thanks" DC

"Exceptional & Dynamic course everyone should do." KL

"Mr. Ali is very knowledgeable in this field.... This session will certainly assist me with my daily work. I highly recommend people to take the time and money and invest in this course. It is worth it." AAA

"The seminar was intensive but well planned. The facilitator was very knowledgeable and aimed to give realistic applications to the techniques taught." JH

"I was impressed within the first 10 minutes of the programme.... Overall, I thoroughly enjoyed this course, didn't know Excel was so powerful." NA

"Course was excellent, well planned and properly delivered, esp. for myself having some fairly good experience with excel and its functionalities..." VR

"I must say I was very impressed with Mr. Ali's presentation style. It was an apt mix of professionalism and a unique spin on Excel techniques. The case study was very interesting; pulling on a myriad of knowledge acquired throughout the sessions" J-MG

"Facilitator is very knowledgeable and explains content brilliantly so that I could understand" KP-G

"Seminar - an excellent opportunity to improve one's knowledge for personal and professional effectiveness and creativity. Facilitator makes the learning process very easy despite the complexity of the topic units" CP

"Excellent all round..." DH

\*Attendee feedback form comments were used with approval. Participant initials are shown at the end of comment

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# Excel Secrets & Techniques in Management Reporting

## Overview

Are you time pressured to prepare frequent & increasingly complicated management reports? If so, then here is the training program for you!

You will learn hands-on, the best secrets, tips and techniques to quickly analyze, summarize and present data as meaningful information for senior management. You will learn at least 30-40 tips, tricks, and techniques to help you efficiently review, analyze and present management reporting information.

## Session Format / Facilitation approach

This is a practical and highly interactive seminar with a mix of tutoring using real life examples, hands on exercises for each technique learnt, combination exercises and Q&As.

## Who will benefit?

All executive & board reporting personnel who want to learn effective reporting tips, tricks & techniques.

## Participant Prerequisites

You should have at least two years' experience using MS Excel to facilitate management reporting and familiar with formatting, editing and basic formula setting in spreadsheets.



*Virtual participants MUST have a Windows based laptop equipped with any MS Excel 2016, 2019 or Office 365 edition along with a reliable internet connection for these sessions. Face-to-face (F2F) classroom participants have the option to rent a laptop for use at the Centre during the class sessions.*



## What are your Key learning points & benefits?

- **Develop core technical skills** in management reporting. Learn 30-40 new techniques.
- **Increase work productivity and save time.** The techniques you learn can reduce the duration of analysis tasks from hours to minutes, freeing up time for higher payoff activities.
- **Receive download links** to practice exercise, videos, other training materials & solutions.
- **Claim 18 CPD hrs.** and a certificate for your attendance at this seminar.
- **Leverage the flexibility** of learning either from the comfort & safety of your home or office or at our Centre if you need to focus away from work & get hands-on attention.

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## Excel Secrets & Techniques in Management Reporting Seminar Pricing (\$ TTD)

 <b>Attending Online</b> Virtual options and pricing 		
Seminar Options	Price	Price + VAT
Day 1 only	\$1,000	\$1,125
Day 2 only	\$1,000	\$1,125
Days 1 & 2	\$2,000	\$2,250
3-Day Discounted Package	\$2,800	\$3,150

 <b>Attending Classroom</b> Classroom options and pricing 		
Seminar Options	Price	Price + VAT
Day 1 only	\$1,400	\$1,525.00
Day 2 only	\$1,400	\$1,525.00
Days 1 & 2	\$2,800	\$3,150.00
3-Day Discounted Package	\$3,500	\$3,937.50

Limited classroom seating available – book early if you want a space.

Check us for a private inhouse session pricing!

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Questions or feedback?  
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# Excel Secrets & Techniques in Management Reporting

Day 1	8:30am – 4pm	Tuesday 23 Apr, 2024
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## Outline

Course introduction & Overview of Excel versions for Management Reporting

### **Best Tips, tricks, techniques to increase your work productivity.**

- Creating an automated table of contents in a workbook to go to a sheet automatically
- Use keyboard short cuts without having to remember any
- Speed up moving in spreadsheets - without having to press a key
- Fastest way to Move to a specific cell in a spreadsheet
- Moving back to your last cell position from one worksheet to another worksheet
- Enter the same info in many non-contiguous cells in a spreadsheet at the same time
- Add and / or average ranges of cells with your mouse only
- Add, Subtract, Multiply & Divide cells - without using formulas
- Formatting multiple cell ranges without using Ctrl & the format paste icon
- Copying a worksheet - faster method than right clicking
- Data tables – Benefits / techniques & how to use to facilitate reporting automation

### **Using & understanding formulas to summarise information.**

- Technique to create formulas without having to write them out
- Sumif formulas & combining with absolute / relative references
- Techniques to independently check formula accuracy
- If then else formulas - single and nested ifs
- Copying formulas all the way down a column Pt 2: Resolve Multiple gaps issue
- Using If with or conditions & also with and conditions - practical uses
- What is a Vlookup function - exact matching examples & problems & how to fix
- VLookups - how the not exact matching feature is useful for ranges / band calculations

### **Graphing & charting techniques for Management reporting**

- Graphs & charts - Basic tips, tricks & techniques & issues
- Charting engine design & menu path differences in the various Excel versions
- 6 key effective graphing & charting tips & design ideas from the experts

15 min Breaks at 10:00am & 2:30pm and 1-hour lunch break each day

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# Excel Secrets & Techniques in Management Reporting

Day 2

8:30am – 4pm

Wednesday 24 Apr, 2024

## Outline

### Graphing & charting techniques for Management reporting

- Creating graphs for correlation analysis - 2 Y axes on a single X axis
- Further charts for Correlation & performance analysis - XY charts
- User defined graphs - avoid recreating your custom designed graphs
- Charting for ranking - Waterfall/ Reconciliation chart vs cell sized Ranking charts
- Charting for performance management - Pareto charts

### Variance analysis in management reports

- Conditional formatting techniques for exceptions reporting
- Highlighting exceptions across rows & dynamic auto banding in reports

### How you can detect and correct errors in management reports

- Using the evaluate formula step by step feature
- Using the Trace Error function in Excel
- Using Excel watch windows for cells monitoring multiple sheets multiple workbooks
- Formula viewing spreadsheets automatic toggle switch
- Using the Trace precedents / dependents buttons
- Edit / Goto / Special function - isolate errors in formulas, numbers, constants etc

### Enhanced Your Data analysis & reporting using Pivots

- Creating & Using pivot tables for automatic data summarisations - practical exercises
- Tips, tricks and benefits of using pivot table reports
- Linking pivot tables to data tables to automate reports
- Using pivot tables to analyse non-financial data - e.g., obtaining unique lists
- Using pivot tables to create filtered / ranked and time series data - graphs / charts
- Group transactional dates data for reports by months, quarters, years etc automatically
- Using pivot tables to automate variance & variance % formulas required for reports
- Creating automated segmental reports by any criteria using pivots

15 min Breaks at 10:00am & 2:30pm and 1-hour lunch break each day

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# Excel Secrets & Techniques in Management Reporting

Day 3

8:30am – 4pm

Friday 26 Apr, 2024

## Outline

### **Text splitting & concatenation techniques in management reporting**

- Working with lists of names – splitting names in 1 column to a 1st, mid & last name column when everyone does not have a middle name. Joining names in 1 column from separate columns
- Automate joining / splitting data using flash fill & also Power Query

### **Sensitivity & Scenario analysis techniques**

- Goal seek - How to use in analysis & evaluation of loans
- Using scenarios - data sensitivity tables - how to do 50 different What if Analyses

### **Excel 2016 & beyond reporting & data visualization techniques**

- How to analyse big data from any database using Power Pivot for Excel
- Using slicers to analyse multiple pivot tables / charts / create a dashboard
- Data visualization technique - using cell sized charts – line / column charts

### **Combination & case exercise**

You will apply what you learnt by combining the many ideas learnt on the course to solve realistic work-based reporting scenarios. From the case you will understand the approach you should take to develop any report and resolve any reporting challenges

### **Using Xlookup vs Vlookup**

Applying to the case combination exercise - why is xlookup the vlookup killer.

### **Using Macros & management reporting**

- Automating tasks: Creating a macro and modifying it - using practical examples
- Understanding absolute vs relative reference macros with examples
- Assigning macros to images / buttons for automatic running of tasks



## Areef Ali & Associates Trainer Profiles

### Facilitator Profile - Mr. Joseph Alexander BSc, MBA, MCT

Joseph Alexander is a certified Microsoft Office Specialist and Microsoft Certified Trainer with over ten years of teaching experience. He is a skilled training facilitator and has conducted training programs for hundreds of employees in various companies across Trinidad and Tobago. His expertise also includes course development, training management, and workforce assessment. He has successfully developed and delivered several training courses in Information Technology programs such as Windows 10/11, Microsoft Office, and Microsoft Teams.

Mr. Alexander possesses a genuine passion for training and development, which shines through in every session he conducts, making it a memorable and enjoyable experience for the participants. He is also known to have the ability to make complex topics simple and easy to understand, as well as being very patient with slower paced learners. He consistently receives overwhelmingly positive feedback from the participants at the end of every training program he delivers. Mr. Alexander's core emphasis is always upon improving workforce productivity to increase company efficiency and profitability. Your company's workers are guaranteed to be in safe hands and have a profitable learning experience with him

### Facilitator Profile - Shakeel Hosein B.Sc., M.Sc., MCT

Shakeel Hosein is an IT trainer with over 10 years' experience in education and IT training. Shakeel possesses a Bachelor of Science (B.Sc.) degree in **Computer Science** from the University of Hertfordshire in England and a Master of Science degree in **Geoinformatics** from the University of The West Indies. He is a Microsoft Certified Trainer and holds an Expert Excel Certification in MS Excel versions 2019 & Office 365.

Shakeel has been a facilitator/ trainer with Areef Ali and Associates for the past six years in the areas of Microsoft Excel and Microsoft Power BI. During that time has taught basic and intermediate Excel, and basic Power BI. Also, he has assisted in training in Advanced Excel.

He has facilitated inhouse and onsite training for a number of organisations.

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## **Facilitator Profile - Areef Ali B.Sc., MBA, FCCA, MCT**

Areef has over twenty-eight (28) years of work experience in the Finance, training & business consulting fields, including three and a half years at Price Waterhouse where he was a member of the Audit and Business Advisory Services Group.

Areef served as a finance professional at the Methanol complex. Subsequently, he was appointed the Chief Accountant and then the Corporate Finance Head at a leading financial institution. In June 2006 Areef, started AAABS to pursue his passion for training and people development.

### **In-house & Public MS Excel & Power BI work**

Since 2007, AABS has provided in-house training and completed consulting projects for diverse teams in MS Excel work productivity and work automation techniques, Financial modelling, Power BI, Management and Dashboard reporting automation. Our clients have included numerous organisations, both private and public sector, locally and internationally.

### **Other MS Office Training**

We also facilitate private training in Word, Power Point, SharePoint, Teams and Outlook based on your requirements.



Thank you for your consideration!

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