Areef Ali & Associates
BUSINESS SOLUTIONS

presents an intensive, instructor led program.

Wed 13th, Thu 14th & Mon 18th January 2027

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

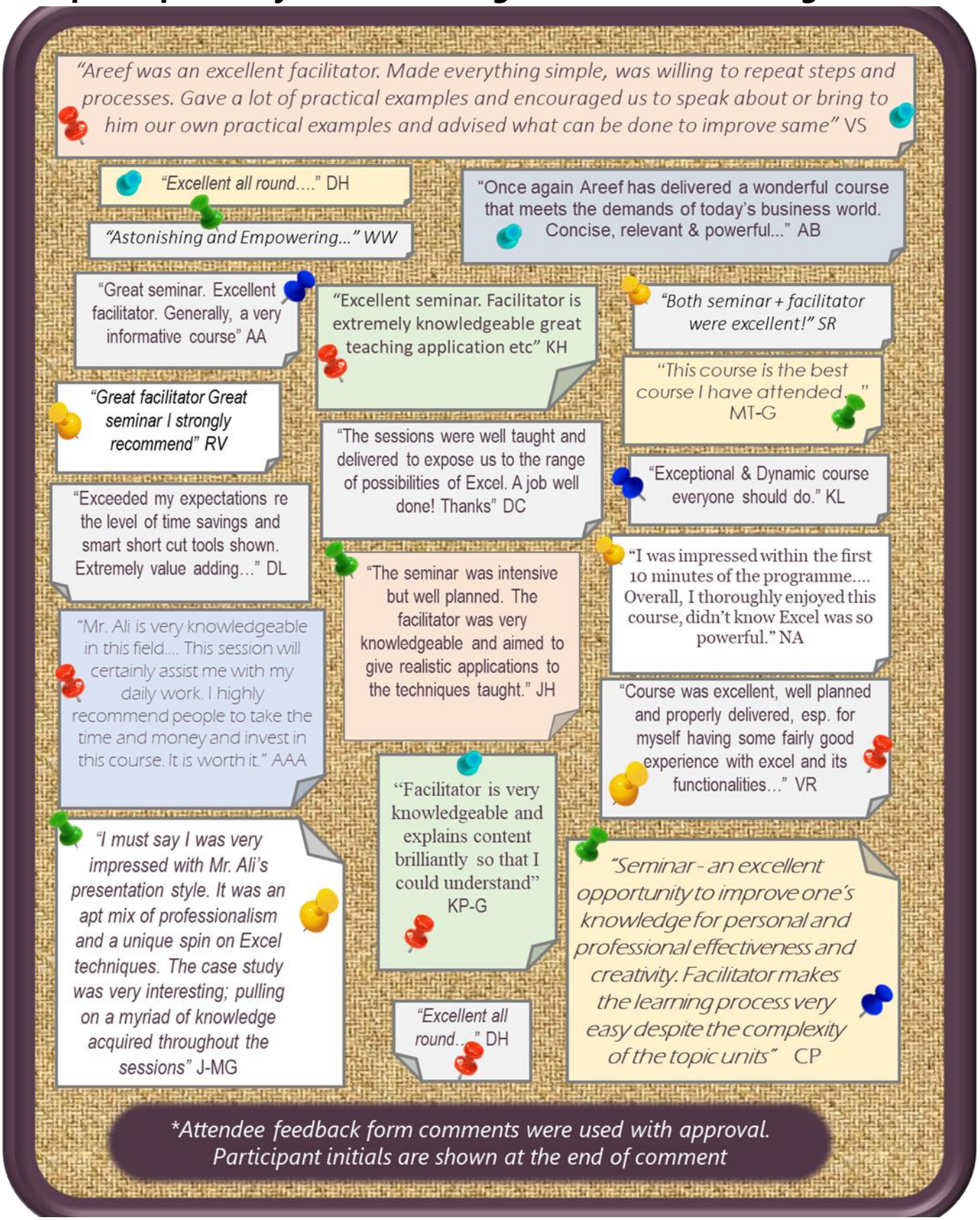
Joseph Alexander BSc, MBA, MOS
Shakeel Hosein BSc, MSc, MCT
Areef Ali BSc, FCCA, CA, MBA, MCT

Contact for inquiries or private group training sessions:

Mr. Areef Ali (868)-788-7538 excelsem@aaa-bsol.com

Click here to register

What participants say after attending our MS Excel training sessions…



Contact us at ***excelsem@aaa-bsol.com*** *or* ***868-788-7538***
to arrange a custom in-house session done in MS Excel work productivity techniques.

Excel Secrets & Techniques
in Management Reporting

Overview
Are you 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)

Attending Online
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

Attending Classroom
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?
areef@aaa-bsol.com
(868) 788-7538
Click here or scan QR code
to visit our website at
www.aaa-bsol.com

Excel Secrets & Techniques
in Management Reporting

Day 1	8:30am - 4pm	Wed 13th January 2027

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
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Day 2	8:30am – 4pm	Thu 14th January 2027

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
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Day 3	8:30am – 4pm	Mon 18th January 2027

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 2019 & 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 reporting challenges. The case incorporates error checking techniques, data structuring techniques, data tables, lookup formulas, pivot table reporting, charting techniques, trending, conditional formatting & many shortcuts, tips & tricks

Using Xlookup vs Vlookup
Applying to the case combination exercise - why is xlookup the vlookup killer. Combining Xlookup with data tables to automate lookups

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

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Areef Ali & Associates Trainer Profiles

Facilitator Profile - Mr. Joseph Alexander B.Sc., MBA, MOS

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 12 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 Power BI. Also, he has assisted in training in Advanced Excel.

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

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

Areef has over thirty (30), years of work experience in the Finance, training, project management & 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 / process 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, please forward to any colleagues who may benefit!

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