



Bespoke Excel Training from Clarity Consultancy Services

Training that delivers

Clarity Consultancy Services

Clarity Consultancy Services is a firm of Financial Management Consultants based in Bristol. With a wealth of experience gained across many sectors we specialise in:

Bespoke Excel Training

Providing on site courses tailored to the client's needs.

Our trainers are qualified accountants who are experts in developing Excel models to recognised best practice standards. Importantly, they are also business consultants and therefore understand how best to apply Excel in the business environment.

Spreadsheet Risk Management

Ensuring that our clients remain in control of their spreadsheets.

92% of financial models contain tax errors. On average 5% of all formulae cells contain errors. We work with our clients to identify, evaluate, remediate and control their spreadsheets.

Change Management

Helping our clients to deliver change within their Finance function.

As well as being qualified accountants, our consultants are qualified and experienced project managers. We help our clients throughout the project life cycle.

Feedback

"The consultant's sincere commitment to providing an excellent service was clearly evident and exceeded all my expectations. In simple terms, the Project would not have succeeded without the high quality service provided. What positioned the consultant as top of his field was his ability to fully understand the needs of the business.

I would recommend the services of Clarity Consultancy Services without reservation."

Our approach

We understand that every company and every individual has different training needs. For this reason we do not offer standard or public Excel courses. We offer bespoke Excel courses tailored to the needs of your business and your employees.



Our bespoke Excel courses allow your team:

- to focus on their own problem areas
- to better understand the range of solutions Excel offers
- to become more efficient and productive using Excel
- to gain real and quantifiable value

Following a training needs assessment, we will propose a selection of modules that we feel will deliver maximum benefit to your team.

For a large team we can develop a timetable spread over a number of days that delivers both flexibility and great value for money.

Where possible we work with examples of your data as this helps to bring the formulae and functions into the context of your business.

Each individual will be provided with a training manual for the modules undertaken. We also provide your team with a USB stick so that they can save their own versions of the examples and exercises for future reference.

Contact details

For further information, or to book a bespoke course, call us on **0117 2301494**. Alternatively you can email us at enquiries@bespokeexceltraining.co.uk.

www.bespokeexceltraining.co.uk

Bespoke Excel Training – Modules overview



We have developed an extensive range of beginner, intermediate and advanced modules.

By selecting the modules that meet your team's needs we can focus the training to deliver maximum benefit and long term results.

A full list of our modules can be found below:

Beginner Modules

B07001 - An Introduction to Excel 2007

Duration:	4 hours
Pre-requisites:	Competent with basic computer functionality
Learning Objectives:	This module will give you an overview of what Excel is, what you can use it for and introduce you to the basic functions.
Content:	<ul style="list-style-type: none">• An overview of the Excel workspace (Ribbon, Quick Access Toolbar, Formula bar and workbook window)• Navigating your way around Excel• File management (open, create a new file, save, close and print)• Simple functionality (entering data, basic formulae, selecting cells, rows and columns)

B07002 - Modifying a worksheet

Duration:	4 hours
Pre-requisites:	An understanding of Excel's basic functionality (covered in B07001)
Learning Objectives:	You will learn how to make basic changes to a worksheet. By the end of this module you will be able to create and modify a simple worksheet.
Content:	<ul style="list-style-type: none">• Add and edit data• Basic formulae• Formatting (Font, borders, alignment)• Copy, Cut and Paste• Tables• Sort and filter

B07003 - Developing a workbook

Duration:	2 hours
Pre-requisites:	A basic knowledge of Excel (B07002 or equivalent)
Learning Objectives:	You will learn how to build a workbook and link between the sheets in your workbook. This will provide you with the building blocks to start building your own simple models.
Content:	<ul style="list-style-type: none">• Overview of workbooks and worksheets• Modifying a workbook• Linking worksheets within a workbook

B07004 - An Introduction to Charts

Duration:	3 hours
Pre-requisites:	A basic knowledge of Excel (B07002 or equivalent)
Learning Objectives:	You will learn how to create simple charts in Excel
Content:	<ul style="list-style-type: none">• Setting up and selecting data• Creating a simple chart• Different chart types• Modifying charts

Intermediate Modules

For all of these modules you should have a good working knowledge of Excel.

I001 – Tables

Duration:	1 hour
Learning Objectives:	Tables were one of the most significant features introduced in Excel 2007. You will learn how to harness their power.
Content:	<ul style="list-style-type: none">• What is a Table?• Creating a Table• Modifying a Table• Working with Tables

I002 - Named Ranges

Duration:	1 hour
Learning Objectives:	The named range function allows you to assign a name to a cell or range. You will learn how to assign a name to a range and how to reference them.
Content:	<ul style="list-style-type: none">• The case for using named ranges• Creating a named range• Referencing a named range

I003 - Data Validation

Duration:	1 hour
Learning Objectives:	Data validation allows you to control the inputs made by the end user. You will learn how to create validations in your spreadsheets.
Content:	<ul style="list-style-type: none">• Types of validation• Create validations• Drop down lists• Linking to named ranges• Validation messages

I004 - Excel and the Web

Duration:	1 hour
Learning Objectives:	You will learn how to create Excel files that you can use on the web and also collect information from the web using Excel.
Content:	<ul style="list-style-type: none">• Creating an HTML file from your spreadsheet• Web queries

I005 - What if analysis

Duration:	2.5 hours
Learning Objectives:	Master Excel's scenario tools.
Content:	<ul style="list-style-type: none">• Manual what-if analysis• Using the camera tool and watch window• Data table• Scenario Manager• Goal Seek• Solver

I006 - Working with external data

Duration:	2 hours
Learning Objectives:	You will learn how to import data from text files and Access into Excel.
Content:	<ul style="list-style-type: none">• Import a text file• Microsoft query• Pivot Tables based on external data

I007 - Worksheet sharing and protection

Duration:	2 hours
Learning Objectives:	You will learn how to share and protect your workbooks.
Content:	<ul style="list-style-type: none">• Sharing workbooks• Protecting worksheets and workbooks• Protecting VBA code

I008 - Pivot Tables

Duration:	2 hours
Learning Objectives:	You will learn how to harness the power of Pivot Tables and turn your data into information that you can action.
Content:	<ul style="list-style-type: none">• Creating a data table• Creating a Pivot Table• Turn your data into information• Using external data• Grouping• Pivot Charts

I009 - Interacting with Word

Duration:	1 hour
Learning Objectives:	You will learn how to share data with Word.
Content:	<ul style="list-style-type: none">• Simple pasting• Embedding

I010 - Customising toolbars

Duration:	1 hour
Learning Objectives:	You will learn how to customise Excel's Quick Access Toolbar (QAT).
Content:	<ul style="list-style-type: none">• Customising the Quick Access Toolbar (QAT)• Adding a macro command to the QAT

I011 - Risk Management

Duration:	2 hours
Learning Objectives:	You will learn how to manage the risk of errors in your spreadsheets.
Content:	<ul style="list-style-type: none">• How to spot common errors• Excel's auditing tools• Tracing relationships

I012 - Conditional formatting

Duration:	2 hours
Learning Objectives:	You will learn how to highlight cells based on determined values and how to use the new features introduced in Excel 2007.
Content:	<ul style="list-style-type: none">• Conditionally formatting a cell or range based on its value• Conditionally formatting a cell or range based on a formula• Visualisation using conditional formatting (2007)

I013 - An Introduction to VBA

Duration:	3 hours
Learning Objectives:	You will learn the building blocks of VBA programming and then learn how to create some simple but very useful macros.
Content:	<ul style="list-style-type: none">• Developer Toolbar• Recording Macros• Visual Basic Editor• Variables• Useful examples

I014 – Userforms

Duration:	2 hours
Pre-requisites:	A basic knowledge of VBA.
Learning Objectives:	You will learn how to create simple userforms and turn them into add-ins so they can be distributed.
Content:	<ul style="list-style-type: none">• Creating Userforms• Linking Userform controls to your worksheets• Useful examples

I015 - User Defined Functions and Add-ins

Duration:	2 hours
Learning Objectives:	Excel's built in formulae may not always do quite what you need. You will learn how to create your own functions and turn them into add-ins.
Content:	<ul style="list-style-type: none">• Creating UDFs• Creating Add-ins• Useful examples

I016 - Working with text

Duration:	1 hour
Learning Objectives:	You will learn how to use the text formulae in Excel.
Content:	<ul style="list-style-type: none">• LEN()• LEFT()• RIGHT()• MID()• CONCATENATE()

I017 - IF, AND & OR

Duration:	1 hour
Learning Objectives:	You will learn how to use these core formulae.
Content:	<ul style="list-style-type: none">• AND()• OR()• IF• Nesting and combining IF AND & OR

I018 – Summing & counting

Duration:	2 hours
Learning Objectives:	You will learn how to master the full suite of summing and counting formulae, from the basic SUM to the powerful analytical tool that is SUMIFS.
Content:	<ul style="list-style-type: none">• SUM• COUNT• COUNTA• SUMPRODUCT• SUBTOTAL• SUMIF• COUNTIF• SUMIFS

I019 - Error Management Formulae

Duration:	1 hour
Learning Objectives:	You will learn how to manage the risk of errors in your spreadsheets.
Content:	<ul style="list-style-type: none">• The types of error (#DIV/0!, #N/A, #VALUE etc)• Error handling formulae (IFERROR, ISNA, ISERROR etc)

I020 - Lookup formulae

Duration:	2 hours
Learning Objectives:	You will learn how to use these key formulae for mapping, matching and comparing data.
Content:	<ul style="list-style-type: none">• LOOKUP• VLOOKUP• HLOOKUP• INDEX• MATCH• VLOOKUP MATCH

I021 – Database formulae

Duration:	1 hour
Learning Objectives:	Excel's database formulae are robust and powerful analytical tools used to interrogate data held in Excel. You will learn how to build robust models using these formulae.
Content:	<ul style="list-style-type: none">• DSUM• DCOUNT

I022 - Days, dates and times

Duration:	1 hour
Learning Objectives:	You will learn how to work with days, dates and times.
Content:	<ul style="list-style-type: none">• Date & time formats• NOW()• DATE()• NETWORKINGDAYS()• DAY(), MONTH() and YEAR()• DATEIF()

Advanced Modules

A001 - Building Better Dashboards in Excel

Duration:	Full Day
Pre-requisites:	A sound knowledge of Excel and experience in using the analytical formulae to create reports
Learning Objectives:	You will learn the theory behind dashboard design and the tools that you can use to create a dashboard in Excel.
Content:	<ul style="list-style-type: none">• Characteristics of bad dashboard design• Characteristics of good dashboard design• Excel tools for dashboarding

A002 - Spreadsheet Modelling Best Practice

Duration:	Full Day
Pre-requisites:	A sound knowledge of Excel
Learning Objectives:	You will learn how to design and build robust, flexible and efficient models in Excel.
Content:	<ul style="list-style-type: none">• The modelling life cycle• Spreadsheet risk• The rules of spreadsheet design

A003 - Risk Management and Auditing techniques

Duration:	Full Day
Pre-requisites:	A sound knowledge of Excel
Learning Objectives:	Undetected errors in Excel spreadsheets provide managers with unreliable information. This can lead to poor business decisions and lost profit. You will learn how to manage spreadsheet risk at a model level basis and for your organisation as a whole.
Content:	<ul style="list-style-type: none">• The risk management cycle• Managing spreadsheets within your organisation• Managing risk within your spreadsheets

A004 - Access for analysts

Duration:	Full Day
Pre-requisites:	A sound knowledge of analysis using Excel, no prior knowledge of Access required
Learning Objectives:	Excel is used to provide a huge range of solutions including being used as a database tool. Access is a much more powerful database tool (that is what it was designed to do) but very few people know how to use it. You will learn the basics of how to use Access and most importantly how to use it to more efficiently perform database storage and analysis.
Content:	<ul style="list-style-type: none">• Why use Access?• An introduction to Access (Tables, Queries and forms)• Analysis techniques• Integrating Excel and Access through Pivot Tables

A005 - Integrating Excel and Access

Duration:	Full Day
Pre-requisites:	A sound knowledge of Excel, intermediate knowledge of VBA and Access
Learning Objectives:	You will learn how to benefit from the joint functionality of Excel and Access to create an Excel based application that analyses data held in Access
Content:	<ul style="list-style-type: none">• An introduction to ADO• Making a connection• Running queries in access from Excel• Building an application

Contact details

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