



CORPORATE TRAINING

for all

1. Basic to Advance Excel

General Formulas, tricks, Shortcuts

2. Data Management

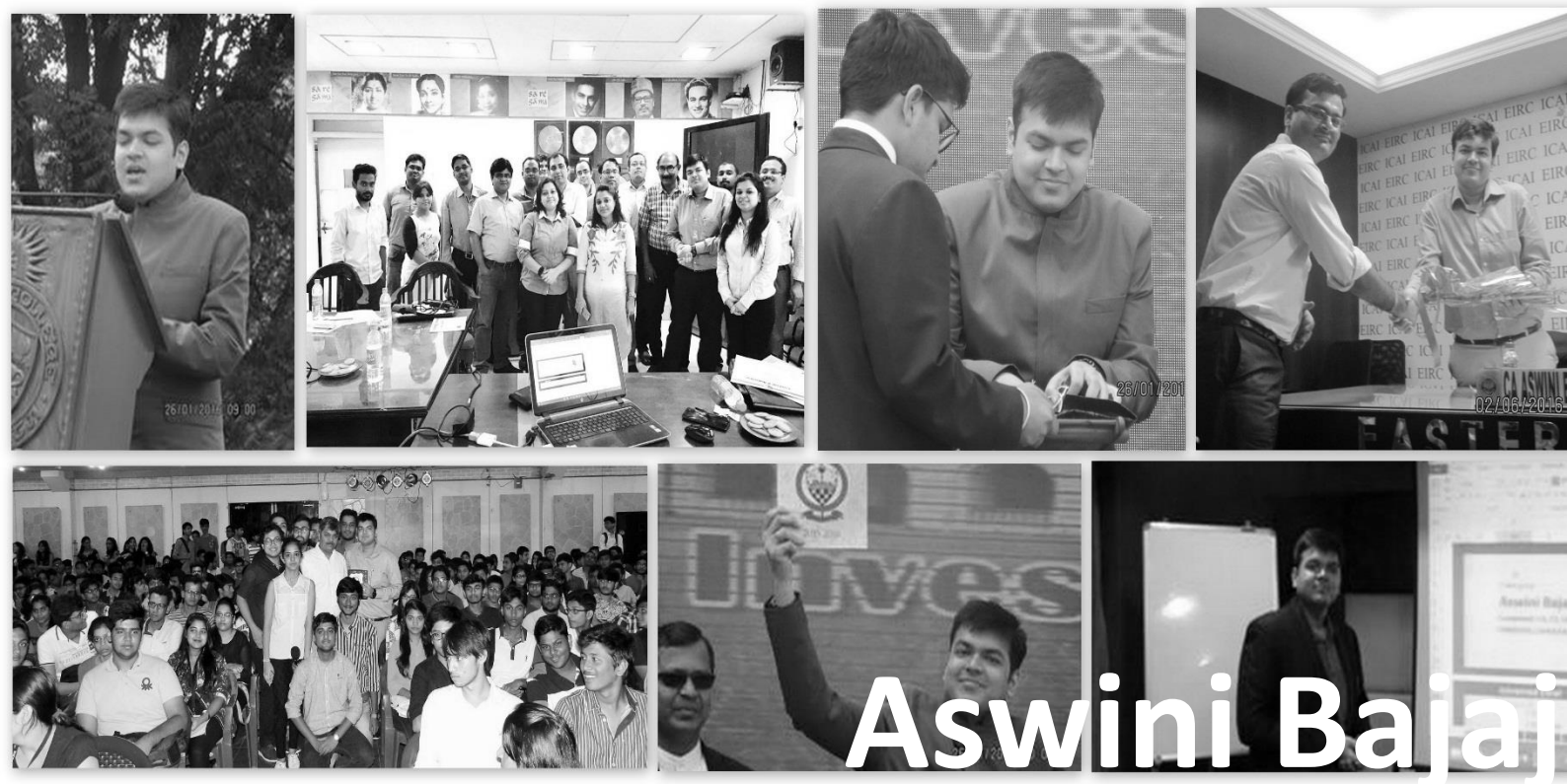
Automation, Reports, MIS, Dashboards, Analysis and Data Crunching

3. Corporate Presentation and Documentation

MS Word & MS PowerPoint

4. The Finance Module

B-Plans, Valuations, Projections, Financial Modeling



Aswini Bajaj

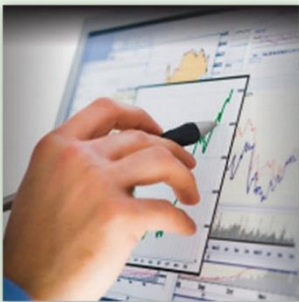
Know Your Trainer !!

- **Qualification:** B. Com (SXC), CA (Rank holder), CFA (US), FRM (US), CAIA (US) CCRA and CS.
- **Visiting faculty** at NSE, BSE; St. Xavier's College, BGES, JDBI; B-Schools like iLead, BIBS, IITrade; Full time trainer for CFA, FRM and SFM – CA Final.
- **Corporate Training**, in Advanced Excel and Finance for TATA Interactive Systems, AIITA, Volvo-Eicher Motor (VECV), Genpact, Saregama, Century Ply, AUM Capital, Quaker Chem, etc.
- **Consulting** for clients in India and Overseas
- Worked at Cairn India in the **MIS, Budgeting and Forecasting** profile.



Why us?

Modules have been designed based on Trainings at B-Schools & Colleges, Corporate Training, Consulting Experience and Corporate Experience



**Interactive
Training
Sessions**



**Certification
shall be
provided**



**Modules are
very user
friendly**



**Sessions with Abundant
Practice and Doubt Solving
Sessions.**



**Applicable for every Job or
business profile**



Why Invest your Time?

- **Resume** - No matter which profile you belong to, Excel will be used for a majority of working hours.
- **Learn Excel** – The amount of data available has increased to an extent and in order to comprehend it, you need it summarised and analysed
- **Speed and Efficiency** – Excel in excel to increase speed and efficiency
- Get more **job ready**
- Summarization of Data to take important decisions in Business.
- **Actually learn something useful and most importantly its application**

Requirements:

- **Bring your device:** You need a laptop (with MS Office installed) and charger.
- **Prior Knowledge required:**
 - No knowledge of Excel required for the 1st Module
 - Knowledge of the basic Excel is mandatory for understanding the other modules.
 - For the Finance-Risk Management Module, understanding of the basic terms in Finance like NPV, IRR, Time Value of Money, Capital Budgeting, etc. is required.
- **Registration:** Please contact your centre for registration process and details.
- **Please note:** **Certificates will be issued by the Kolkata Office, only after all the sessions have been attended and the attendance list is submitted by the Franchise.**



Training Fee:

MODULE	Duration (Hours)	FEES (Rs.)
1. Basic to Advance Excel	10	1500
2. Data Management	15	3500
3. Corporate Presentations and Reporting	5	1000
4. The Finance Module	15	3500
		9500
		7000

Please Contact Your Centre for Date, Time and Venue.



Training Outline

1. Basic to Advance Excel

Data
Management

Corporate
Presentation
and
Reporting

The Finance
Module

- **Mathematical**- Sum, Sumproduct, Average, Averagea, Min, Mina, Max, Maxa, Small, Large, Abs, Count, countblank, counta, Rank Absolute And Relative Referencing
- **Paste Special**- Value, Format, Transpose, Link, And Many Useful Features
- **Rounding Functions**- Round, Roundup, Rounddown, (Also To Nearest Tens, Hundreds)
- **Date**- Day, Date, Month, Year, Now, Today, Cleaning And Formatting
- **Text Functions**- Trim, Concatenate, '&', Lower, Proper, Upper, Value
- **Advance Text**- Left, Right, Mid, Replace, Substitute, Find, Len, Working With '*' For Data Cleaning, Text To Column, Other Advance Data Cleaning Techniques
- **Shortcuts**- Smart Editing Techniques, Learning Useful Shortcuts The Easy Way, Formatting
- **Lookup Functions**- Vlookup, Hlookup, Automation Of The Same
- **Logical Operators**- If, Nested If, And, Or, Isna, Iserror
- **Basic**- Data Filtering, Creating Pivot Tables, Charts And Formatting (Advance Level Covered In The Next Module)



Basic to
Advance
Excel

2. Data Management

Corporate
Presentation
and
Reporting

The Finance
Module

- **Advance Lookup-** Index and Match, Indirect, Offset with cell range naming, combining match with vlookup
- **Advance Date-** Workday, Networkday, Workday.Intl, Networkday.Intl, EOMonth...
- **Advance Logical-** Countif, Sumif, Averageif, Sumifs, Countifs, Averageifs, Its application in dashboards
- **Data Validation-** Data Validation, Lists, Rules, Input and Error Messages and Basic Form Controls, Designing Forms
- **Formula Auditing Techniques-** Check Formulas, Spot errors, Linking and cleaning Techniques
- **Scenario Manager-** Scenario analysis, Goal Seek, use of macros to make it user friendly
- **Remove Duplicates-** Various techniques to remove duplicates, extract unique values and to compare lists
- **Data Cleaning-** Goto Special, cleaning techniques for imported data to avoid error, Using Filters to Clean Data, Split and Freeze Panes
- **Array Functions-** Array formulas, Array constant, Create one dimensional and two dimensional constants.
- **Advance Filter-** Subtotals, subtotal formula, group ungroup, unique values, custom filters



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The Finance
Module

- **Dashboard Preparation-** Dashboard for MIS, Analysis, different dashboards for different business types and business segments, will include a self-assignment (formulas like offset, advance formatting, macros, hyperlink, etc.)
- **Advance Pivot-**Formatting, grouping, computing %, Summarizing Values, Auto report Generation – 100s with a click, Calculated Fields, Connecting Multiple Sources of data, Use of Slicer and Report Filter to create quick dashboard, Pivot charts, Power pivot and Power View – Introduction, and other Advance features, Consolidating data across multiple tables
- **Advance Charts-** Thermometer, Speedometer, Sparklines and easy formatting techniques
- **Customizing Ribbon-** Have your own ribbon like File, View with your designed Functions to perform repetitive tasks, automation and extremely useful time saving technique.
- **Macros-** Run, record, use, save and work with them
- **VBA Code Snippets-** To be able to use free VBA code snippets available online and use them to perform certain tasks like convert a number in word form



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3. Corporate Presentation and Reporting

The Finance
Module

- **Shapes, Slides, Alignment, and Distribution-** Tricks to Insert, format, align, group, and distribute shapes in PowerPoint within seconds, Format Dipper, Default Shapes, Merge Shape, etc.
- **Slide Master and Sections for Organization-** How to manipulate PowerPoint presentations with the Slide Master, Sections, and viewing modes.
- **Using Excel and Word Data, Pictures, and Tables-** PowerPoint shortcuts and automation techniques, Linking of Excel Data with PPT
- **Creating Impact-** Emerging trends on visual effects such as magnifiers, highlighters, de-highlighters, cut-outs, layers, topic trackers
- **Speed Tricks-** Lightning fast shortcuts and custom tricks to perform recurring activities such as alignment, editing text, cloning shapes, working with SmartArt etc.
- **Corporate Presentation-** Dos and Don'ts of a Corporate Presentation
- **MS Word-** Automation of Billing processes using Excel Database and Mail Merge Function
- **MS Word Tricks-** Auto generation Of Table of Contents, Cool Shortcuts, And Quick Formatting Techniques, Spike Test, Page Layouts, Track Changes
- **Gmail-** Customizing Your Inbox, Organizing Your Emails, Increasing Your Productivity



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4. The Finance Module

- **Financial Modelling-** Automation of financial statements
- **Financial Functions-** Loan Amortization Schedule and functions like PV, FV, PMT, Rate, Nper, IPMT, CUMPMT, etc
- **Projections-** Depreciation and Working Capital schedule, Ratio Analysis
- **Valuations-** proper equity research templates and proforma valuation sheets.
- **B-plan-** Creating and analysing a basic Business plan
- **Corporate Finance-** NPV, IRR, Capital Budgeting and structuring, Valuations, cash flow projections, DCF, FCFF, FCFE valuation
- **Regression Analysis-** Trend Lines, Anova Analysis, Deriving equations, forecasting, statistical functions, Use in Projections, Linear Least Squares, Multiple Regression, Residual.
- **Statistical Analysis-** Conduct sensitivity and 'What if Analysis', Scenario Analysis, Dashboards, Interactive Financial Models, Monte Carlo Simulation
- **Options-** Payoffs, Bull/Bear Put/Call Strategies, Butterfly, Straddle Strangle, Strip Strap, Implied Volatility, Charts



Contact Details:

Sudarshan Agrawal Classes

Training Venue:

Your Centre

Office Address:

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Saturday -10.00 am - 3.30 pm

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Please Contact Your Centre First, In case of any issues