



## Get more out of Excel!

Best-practice training in data analysis,  
planning and business modelling



# Excel is everywhere, but is often not used efficiently

## Excel...

- is used in many company departments, not just in accounting and finance
- provides great functionality to complete tasks more efficiently and flexibly
- data is readily available as an output from many IT systems

## But Excel can often be...

- used inefficiently
- too complex to be self-explanatory
- error-prone when used incorrectly

## Our best-practice training can help you...

- + carry out work more effectively and efficiently
- + save work by speeding up tasks
- + focus on providing valuable support for your business
- + avoid costly mistakes



# We offer a variety of workshops to meet your needs

Our workshops are for users at various levels, and each one has a different business focus

1. Excel Basics	2. and 3. Data preparation and analysis	4. Planning and calculations	5. Business modelling intermediate	6. Business modelling advanced
Learn Excel basics incl. basic data entry and formulas, formatting and navigation	Bring together data from various sources, and analyse it to produce useful outputs - for intermediate or power-users	Calculate planned sales based upon provided data and assumptions, produce useful outputs incl. pivot tables	Produce a flexible cash flow using more complicated functions and produce useful outputs	Plan, develop and use a financial model with value drivers and integrated financial statements (P&L, balance sheet and cashflow)

- All workshops are based on **realistic tasks and case studies** and combine improved Excel skills and business understanding
- Participants learn **best-practice methods** and functions to help them in their daily work
- Participants also learn **valuable tips and tricks** along the way
- All participants receive **useful handouts** such as the best Excel shortcuts for ready reference
- Workshops can be delivered **on-site or virtual**
- **Customised and individual** training courses are also available e.g., M&A modelling, profi-workshops, macros (VBA)

+ We discuss your business needs and the training needs of participants with you in advance to ensure you receive the best training



# 1. Excel basics

Level: Beginner	
Target audience	Users with no or minimal prior Excel knowledge who want to learn how to perform basic data entry and calculations efficiently
Prerequisites	None
Learning objectives: Having completed the workshop participants will be able to...	<ul style="list-style-type: none"><li>• Set up a basic spreadsheet</li><li>• Efficiently enter data and formulas</li><li>• Use basic functions (basic arithmetic operations, SUM, IF, simple VLOOKUP)</li><li>• Format cells (fonts, colours, backgrounds, borders etc.)</li><li>• Efficiently navigate within workbooks</li></ul>
Format	<ul style="list-style-type: none"><li>• 3 hours + break</li><li>• Virtual or on-site</li><li>• Individual exercises and mini analysis, completed step-by-step with instructors</li></ul>
Handouts	The best Excel shortcuts organised by topic helps participants work more efficiently

## 2. Data preparation and analysis – intermediate

Level: Intermediate	
Target audience	Users who wish to improve their skills in data preparation and analysis e.g., to perform regular or ad-hoc analysis more efficiently and effectively
Prerequisites	Basic Excel knowledge e.g., formatting, arithmetic operations, basic lookups
Learning objectives: Having completed the workshop participants will be able to...	<ul style="list-style-type: none"><li>• Specify analysis goal and define data needs</li><li>• Import data from different sources and with different formats in Excel</li><li>• Cleanse and prepare data for analysis (e.g., text functions, flash fill)</li><li>• Use various techniques to combine and structure data (e.g., filters, lookups VLOOKUP, INDEX/MATCH, SUMIFS)</li><li>• Create useful outputs: graphs, tables and pivot tables</li></ul>
Format	<ul style="list-style-type: none"><li>• 4 hours + break</li><li>• Virtual or on-site</li><li>• Case study: revenue analysis, completed step-by-step with instructors</li></ul>
Handouts	<ul style="list-style-type: none"><li>• Modelling golden rules</li><li>• The best Excel shortcuts organised by topic helps participants work more efficiently</li></ul>

### 3. Data preparation and analysis – Power-user

Level: Expert	
Target audience	Users who wish to learn Power Query and Power Pivot (Excel) or Power BI (separate tool) to prepare and analyse large or complex data sources efficiently and produce informative dashboards
Prerequisites	Solid Excel knowledge e.g., lookup formulas, formatting, basic charts, normal pivot tables
Learning objectives: Having completed the workshop participants will be able to...	<ul style="list-style-type: none"><li>• Specify analysis goal and define data needs</li><li>• Import data from different sources and with different formats using Power Query/Power BI</li><li>• Clean and prepare data for analysis using Power Query/Power BI</li><li>• Understand and construct effective data models (star and snowflake designs, unique keys)</li><li>• Create and use calculated columns and measures</li><li>• Create flexible, user-friendly dashboards using Power Pivot tables, charts or Power BI visuals</li></ul>
Format	<ul style="list-style-type: none"><li>• 6 hours + breaks</li><li>• Virtual or on-site</li><li>• Case study: revenue analysis, completed step-by-step with instructors</li></ul>
Handouts	<ul style="list-style-type: none"><li>• Modelling golden rules</li><li>• Power-user tips and tricks</li></ul>

# 4. Planning and calculations

Level: Intermediate	
Target audience	Users who wish to expand their skills in Excel calculations to perform intermediate-level planning and calculations effectively and efficiently
Prerequisites	Solid Excel knowledge e.g., formatting, arithmetic operations, basic lookups
Learning objectives: Having completed the workshop participants will be able to...	<ul style="list-style-type: none"><li>• Specify planning goal and define the inputs and outputs for a basic planning model</li><li>• Follow financial modeling best practice (e.g., clearly marked inputs, data validation, checks)</li><li>• Develop intermediate-level, flexible Excel formulas incl. \$-fixing, complex IFs, date functions</li><li>• Create useful outputs: complex graphs, sparklines, pivot tables with slicers</li><li>• Use tips and tricks (e.g., shortcuts, print set-up)</li></ul>
Format	<ul style="list-style-type: none"><li>• 3 hours + break</li><li>• Virtual or on-site</li><li>• Case study: rent income analysis and planning, completed step-by-step with instructors</li></ul>
Handouts	<ul style="list-style-type: none"><li>• Modelling golden rules</li><li>• The best Excel shortcuts organised by topic helps participants work more efficiently</li></ul>

## 5. Business modelling – intermediate (1-way model)

Level: Intermediate	
Target audience	Users with solid Excel knowledge looking to expand their skills in Excel calculations e.g., to create a flexible planning tool combining various inputs
Prerequisites	Solid Excel knowledge e.g., \$-anchoring, lookup formulas, formatting, charts
Learning objectives: Having completed the workshop participants will be able to...	<ul style="list-style-type: none"><li>• Explain types of cash flow</li><li>• Define the inputs and expected outputs for a liquidity cash flow planning model</li><li>• Build flexible Excel formulas that can be reused across a model</li><li>• Create visualisations for cash flows</li><li>• Use advanced date formulas</li></ul>
Format	<ul style="list-style-type: none"><li>• 4 hours + break</li><li>• Virtual or on-site</li><li>• Case study: cash flow planning tool, completed step-by-step with instructors</li></ul>
Handouts	<ul style="list-style-type: none"><li>• Modelling golden rules</li><li>• The best Excel shortcuts organised by topic helps participants work more efficiently</li></ul>



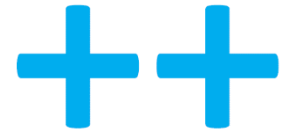
## 6. Business modelling – advanced (3-way model)

Level: Expert	
Target audience	Users with proficient Excel knowledge looking to further expand their modelling skills to create a dynamic, 3-way planning model
Prerequisites	Expert Excel knowledge: proficient use of all standard functions and functionality
Learning objectives: Having completed the workshop participants will be able to...	<ul style="list-style-type: none"><li>• Understand financial modelling fundamentals – best practice, model structure, efficient set up</li><li>• Structure necessary data (inputs)</li><li>• Understand and develop P&amp;L and balance sheet value drivers (calculations)</li><li>• Optional: Model detailed cash and debt – interest, cash sweep, avoid circular references (calculations)</li><li>• Develop integrated 3-way financial statements – P&amp;L, balance sheet and cash flow (outputs)</li><li>• Perform integrity and error checking – individual and master checks, error correction (usage)</li></ul>
Format	<ul style="list-style-type: none"><li>• 8 to 12 hours + breaks)</li><li>• Virtual or on-site</li><li>• Case study: Integrated financial model with value drivers, completed step-by-step with instructors</li></ul>
Handouts	<ul style="list-style-type: none"><li>• Modelling golden rules</li><li>• Recommended value drivers for key financial statement positions</li><li>• The best Excel shortcuts organised by topic helps participants work more efficiently</li></ul>

# 7. Customised and individual training

Level: Any level chosen	
Target audience	As per your requirements
Prerequisites	Depends upon your requirements
Learning objectives: Having completed the workshop participants will be able to... (examples)	<ul style="list-style-type: none"><li>• <b>M&amp;A or LBO modelling with valuation:</b> understand concepts and methods, develop models including financing, perform sensitivity analysis and present results clearly</li><li>• <b>Wizard workshop:</b> effectively use advanced functions and tools such as dynamic arrays and data tables, create scenarios and perform sensitivity analysis</li><li>• <b>Macros (VBA):</b> develop and test simple macros to automate repetitive tasks</li><li>• <b>Old tools made new:</b> optimise tools and models already in use (we familiarise ourselves with them beforehand)</li></ul>
Format	<ul style="list-style-type: none"><li>• To be decided, based upon scope and requirements</li><li>• Virtual or on-site</li><li>• Case study or other customised learning content</li></ul>
Handouts (examples)	<ul style="list-style-type: none"><li>• M&amp;A or LBO training material</li><li>• The best Excel shortcuts organised by topic helps participants work more efficiently</li><li>• VBA snippets – ready to use code for commonly performed tasks</li></ul>

# Training from Knott Consulting has many benefits



- + **Relevant:** we discuss your requirements and agree on a suitable training plan to meet both your business needs and the training needs of your participants
- + **Effective:** participants learn hands-on using realistic, practical case studies
- + **Best practice:** we cover essential theory and give practical tricks and tips for effective, reliable working
- + **Lasting:** participants learn independently on the basis of our targeted tasks and case studies with our guidance and support to help ensure a lasting learn effect
- + **Enjoyable:** our experienced trainers really enjoy using Excel and are highly motivated to make the training not only effective but also enjoyable 😊😊😊

## Feedback from previous trainings

*“ Gary Knott's training courses have completely convinced us. He tailored the topics to be covered individually to our needs in advance, and the training content, models and tasks were both theoretically sound and extremely practical. The hand-outs contained numerous best practice tips that made everyday modelling much easier. The seminar was rounded off by Gary's patient, competent and friendly way of conveying the material to the participants, so that my colleagues and I not only learned valuable things, but also had a lot of fun during the training.”*

Rolf Martin Blume, CFA, Director Corporate Finance / M&A, DZ Bank

*“ Thank you very much for the great Excel training. I was able to take away many new tips and tricks that will facilitate my daily work.”*

Jeannine Hartmann, Manager Accountant, JLL Property Group

# We look forward to helping you...

**kno++**  
CONSULTING

[www.knott-consulting.de](http://www.knott-consulting.de)

[www.how2excel.com](http://www.how2excel.com)



## **Gary Knott**

Chartered Accountant (FCA)

Over 30 years of experience - at Deloitte in England and Germany, and since 2015 as freelancer

Experienced business modeller and data analyst

+49 (0) 177 678 6281

[gknott@knott-consulting.de](mailto:gknott@knott-consulting.de)

## **Romina Badecke**

Chartered Financial Analyst (CFA) and qualified CFI modeller (FMVA)

13 years' experience in business and banking

Experienced business modeller and data analyst

+49 (0) 173 842 2302

[rbadecke@knott-consulting.de](mailto:rbadecke@knott-consulting.de)