

Excel Best Practice

Learn the skills needed to build robust, transparent, and structured models in Microsoft Excel by using industry recognised best-practice principles.



1 Day



Live Online or
Classroom



Flexible Sessions



After Course Care

PPS prides itself in interactive courses which result in tangible skills, driven by practical exercises in all key areas based on real-world problems and solutions.

Our objective is for attendees to complete the course having gained the required skillset, using guided exercises and joint problem solving.

Course content

Benefits of modelling best practice

- Saving time
- Keeping costs low
- Understanding and minimising model risk



Exercises to practice applying financial modelling best practice principles in any spreadsheet

- Consistency
- Integrity
- Simplicity
- Linearity
- Separation
- Flexibility

Learning outcomes

- Learn the industry recognised best practice financial modelling principles and techniques
- Ensure data integrity and calculation transparency by applying best practice principles
- Use Excel functionality efficiently, know which functionalities to use and which to avoid
- Minimise the risk of error by building consistent and reliable error check network
- Manage the size of the model by reducing excessive formulae nesting and repetition



Who should attend

This course is applicable to any spreadsheet user who wishes to gain industry-recognised best practice skills required for building new or restructuring old models. While there is a financial focus to the course, it is useful for anyone who uses Excel regularly. Investors, analysts, accountants, and any other finance professionals would find it beneficial, especially if they are self-taught Excel users.



Pre-requisites & equipment required



Attendees should have basic knowledge of Excel. All relevant functions will be included in handouts to be provided in advance of course start and will be refreshed briefly on the first day. A windows PC with web camera, microphone and speakers (internal or external) is required with Microsoft Excel and Zoom/Teams application installed.



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Course reference:
FMC04

Contact us for more information



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