MAWA EVENTS

Address: No. 857, Block A2. Leisure Commerce Square - No 9., 46150 Petaling Jaya, Selangor, Malaysia

Phone: +601116373203 | **Email:** info@mawaevents.net

EXCEL FOR FINANCIAL PLANNING AND ANALYSIS (FP&A)

""Leveraging Excel for Effective Financial Analysis, Forecasting, and Decision-Making""

Schedule

Date	Venue	Fees (Face-to-Face)
19 – 23 Apr 2026	Doha, Qatar	USD 3495 per delegate

► **Available delivery methods:** Face-to-Face & Online Training

Introduction

Excel is a powerful tool widely used in financial planning and analysis (FP&A) for budgeting, forecasting, and decision-making. This 5-day course is designed for finance professionals, analysts, and managers who want to master Excel to enhance their FP&A capabilities. The course focuses on advanced Excel techniques, tools, and templates that allow you to streamline financial analysis, create robust financial models, and optimize reporting. Participants will gain practical, hands-on experience with Excel functions and formulas, as well as learn how to efficiently manage and analyze financial data to support strategic business decisions.

Objectives

By the end of this course, participants will be able to:

- Apply advanced Excel functions and formulas for financial modeling and analysis
- Create detailed financial models for budgeting, forecasting, and valuation
- Automate data analysis and reporting to improve productivity and accuracy
- Utilize Excel for sensitivity analysis, scenario modeling, and financial forecasting
- Design dynamic dashboards and reports to present financial data effectively to stakeholders

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Why Attend

- Learn how to leverage Excel’s advanced features to streamline financial planning and analysis tasks
- Enhance your ability to build robust financial models for budgeting, forecasting, and analysis
- Discover time-saving techniques and automation tools in Excel to improve your workflow
- Improve your financial reporting and analysis through powerful visualization techniques
- Gain practical knowledge that can be immediately applied to your organization’s FP&A functions

Target Audience

This program is designed for:

- Financial analysts and planners
- Finance managers and directors
- Accounting professionals involved in budgeting, forecasting, and analysis
- Anyone responsible for financial reporting and analysis within an organization
- Professionals looking to enhance their Excel skills for FP&A functions

Individual Benefits

Key competencies that will be developed include:

- Mastery of advanced Excel functions and tools for financial analysis
- Ability to design and implement financial models for a wide range of FP&A tasks
- Skills in creating dynamic, interactive financial dashboards and reports
- Enhanced ability to forecast and analyze financial data with precision and efficiency
- Improved data visualization techniques for clear and concise financial presentations

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved financial analysis and reporting capabilities that enhance decision-making
- Increased efficiency in budgeting, forecasting, and financial modeling
- More accurate financial forecasting and scenario planning to support strategic goals
- Enhanced ability to present financial data in a user-friendly and insightful format
- A higher level of FP&A competency that adds value to the organization’s financial operations

Instructional Methodology

- Lectures on advanced Excel functions, formulas, and techniques for FP&A
- Case studies to explore real-world applications of Excel in financial modeling and analysis
- Group exercises to practice building financial models and reports using Excel
- Hands-on workshops to apply Excel functions and create dynamic financial models and reports
- Interactive discussions on best practices and strategies for using Excel in FP&A

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Course Outline

Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Learning Modules | Coffee Breaks: 09:30 & 11:15 | Lunch Break: 01:00 – 02:00

Day 1: Introduction to Advanced Excel for Financial Planning

- Module 1: Excel Basics and Key Financial Functions (07:30 – 09:30) • Overview of Excel features for financial planning and analysis • Using financial functions: NPV, IRR, PMT, and other key formulas • Advanced Excel functions: INDEX, MATCH, VLOOKUP, and OFFSET
- Module 2: Data Management and Financial Analysis (09:45 – 11:15) • Importing and organizing data for analysis • Cleaning and preparing financial data for analysis • Techniques for large data sets: PivotTables and data validation
- Module 3: Workshop – Creating a Financial Model (11:30 – 01:00) • Participants will create a basic financial model using Excel

Day 2: Building Financial Models and Forecasting Techniques

- Module 4: Creating Advanced Financial Models (07:30 – 09:30) • Building multi-year forecasting models • Forecasting with linear regression and trend analysis • Building assumptions-based models for budgeting and forecasting
- Module 5: Sensitivity Analysis and Scenario Modeling (09:45 – 11:15) • Using Excel's data tables for sensitivity analysis • Building scenario models to forecast different business outcomes • Introduction to Monte Carlo simulation for risk analysis
- Module 6: Workshop – Sensitivity and Scenario Analysis (11:30 – 01:00) • Participants will conduct sensitivity analysis and create scenario models for a financial scenario

Day 3: Automating Financial Reporting and Dashboard Design

- Module 7: Automating Excel Reports and Dashboards (07:30 – 09:30) • Creating dynamic reports with Excel's built-in tools • Using conditional formatting and data validation for interactive reports • Building automated financial dashboards
- Module 8: Advanced Charting and Visualization Techniques (09:45 – 11:15) • Creating visually appealing and insightful charts and graphs • Using Excel's PowerPivot and Power Query for large data sets and analysis • Designing dashboards that communicate key financial metrics effectively
- Module 9: Workshop – Building Financial Dashboards (11:30 – 01:00) • Participants will design a financial dashboard for decision-makers

Day 4: Advanced Excel Techniques for FP&A and Reporting

- Module 10: Advanced Excel Tools for Forecasting and Budgeting (07:30 – 09:30) • Using Solver and Goal Seek for optimization and what-if scenarios • Creating dynamic budgets with Excel's form controls and data validation • Integrating Excel with other financial systems (ERP, accounting software)
- Module 11: Best Practices in Excel for FP&A (09:45 – 11:15) • Structuring financial models for transparency and accuracy • Best practices for financial modeling and reporting • Error-checking and auditing techniques for complex Excel models
- Module 12: Workshop – Building a Complex Financial Forecasting Model (11:30 – 01:00) • Participants will build and refine a complex financial forecasting model with advanced Excel techniques

Day 5: Final Project and Review

- Module 13: Review and Refining Your Financial Model (07:30 – 09:30) • Review of key Excel functions and techniques covered in the course • Refining financial models and reports based on feedback • Best practices for presenting financial data to stakeholders
- Module 14: Final Project – Creating a Complete Financial Model and Presentation (09:45 – 11:15) • Participants will work on creating a complete financial model for a sample company
- Module 15: Wrap-Up and Certification (11:30 – 01:00) • Final Q&A session and feedback on models created during the course • Presentation of certificates upon successful completion of the course

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Certification

Upon successful completion of this course, participants will receive a Certificate of Completion in Excel for Financial Planning and Analysis (FP&A), demonstrating their ability to utilize advanced Excel techniques for financial modeling, analysis, and reporting in an FP&A context.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation’s unique goals.

In-House / Customized Training Interested in running this course for your team? Please contact us:	TEL: **+601116373203**	EMAIL: **info@mawaevents.net**

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