

# SPREADSHEET SKILLS FOR PLANNING, FORECASTING AND BUDGETING TRAINING

*"Master Excel and Spreadsheet Tools to Enhance Financial Planning, Accurate Forecasting, and Effective Budgeting."*

## Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

## Introduction

Effective financial planning, forecasting, and budgeting require strong spreadsheet skills to analyze data, model scenarios, and present actionable insights. This course equips participants with practical Excel and spreadsheet techniques to streamline planning processes, improve forecasting accuracy, and optimize budgeting decisions.

Through hands-on exercises, real-world case studies, and applied templates, participants will learn to develop dynamic models, automate calculations, and interpret data to support informed decision-making.

## Objectives

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

- Build and manage dynamic spreadsheets for financial planning and budgeting.
- Apply formulas, functions, and advanced Excel features for forecasting.
- Develop financial models for scenario analysis and decision support.
- Automate repetitive spreadsheet tasks using templates and macros.
- Analyze, visualize, and present financial data effectively.
- Improve accuracy and efficiency in planning, forecasting, and budgeting processes.

## Why Attend

Spreadsheet skills are essential for finance and accounting professionals, managers, and analysts. This course enhances productivity, ensures accuracy, and enables participants to create reliable financial models that guide strategic business decisions.

## Target Audience

This course is suitable for:

- Finance and accounting professionals
- Budget and planning officers
- Business analysts and management accountants
- Project managers and operational managers
- Professionals involved in financial reporting, forecasting, and budgeting

## Individual Benefits

- Develop advanced spreadsheet and Excel modeling skills.
- Enhance analytical and problem-solving capabilities.
- Improve accuracy and efficiency in planning, forecasting, and budgeting tasks.
- Gain practical, hands-on experience with real-world financial data.
- Increase professional value and decision-making competence.

## Organizational Benefits

- Streamline financial planning and forecasting processes.
- Reduce errors and improve accuracy in budgeting and reporting.
- Enable better decision-making with reliable data models.
- Increase productivity through automation and efficient spreadsheet practices.
- Build internal capacity for data-driven financial management.

## Instructional Methodology

- Instructor-led interactive sessions
- Practical exercises and hands-on Excel modeling
- Real-world case studies and scenario analysis
- Group workshops and collaborative exercises
- Continuous feedback, Q&A sessions, and applied learning exercises

## Course Outline

Module 1: Introduction to Spreadsheets and Excel for Financial Planning

Module 2: Essential Formulas and Functions for Budgeting and Forecasting

Module 3: Creating Dynamic Financial Models

Module 4: Scenario Analysis and Sensitivity Modeling

Module 5: Advanced Excel Tools – Pivot Tables, Power Query, and Power Pivot

Module 6: Automating Tasks with Templates and Macros

Module 7: Data Visualization and Dashboard Reporting

Module 8: Linking Financial Models to Planning and Forecasting Processes

Module 9: Case Studies – Real-World Financial Modeling Challenges

Module 10: Capstone Exercise – Building a Complete Planning and Budgeting Spreadsheet Model

## Certification

Upon successful completion, participants will receive a Certificate in Spreadsheet Skills for Planning, Forecasting, and Budgeting, validating their ability to design, implement, and analyze spreadsheets that support effective financial planning and decision-making.

## 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:

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