



Modern Excel for FP&A Workshops

Overview

As an FP&A professional, you understand the crucial role of data in financial planning and analysis. If you haven't leveraged the latest features in Microsoft Excel for data cleaning and reporting, you're not harnessing its full potential. This two-day workshop is designed to introduce FP&A professionals to Modern Excel and its suite of powerful analytics tools.

Workshop overview

1. **Power Query for Financial Data Management:** Learn to build efficient data cleaning workflows tailored for financial data, ensuring accuracy and timeliness in reporting.
2. **Advanced Financial Modeling with Power Pivot:** Dive into relational data models and financial dashboard creation directly in Excel, using Power Pivot to handle complex financial datasets.
3. **Next-Gen Features for FP&A:** Explore dynamic array functions, AI-powered insights for financial forecasting, and Python integration for advanced financial analysis.

At a glance:

- Two-day Excel for FP&A workshop
- Up to 20 in-person or 35 online participants

What you'll get:

- Approximately twelve hours of hands-on, demo-driven instruction
- Step-by-step demo notes and handouts
- Supplemental video content



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What makes this workshop different

I know there are lots of places to learn Excel these days. What distinguishes this workshop is that it's:

- **Participative.** The quicker you apply what you learn, the more likely you are to retain it. This is literally a hands-on workshop where attendees will have plenty of time on the keyboard to try the concepts out for themselves with demos, activities and more.
- **Authoritative.** The workshop is designed and led by me, George Mount. I run my own analytics consultancy and am both an author with O'Reilly Media and Microsoft MVP.
- **Topical.** No fake, boring data sources and examples here. Upon request, I will design the workshop to use data from your own organization or industry. In any case, I'll use a variety of real world and fun datasets.

Due to their hands-on and participative nature, sessions work best for groups of up to 20 in-person or 35 online participants.

What does Modern Excel for FP&A look like?

- Import, merge and analyze large datasets with minimal manual effort
- Use AI-powered techniques to manipulate, visualize and analyze data
- Build flexible, dynamic reports that are easy to use and hard to break



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Who should attend

This workshop is ideal for FP&A professionals, including financial analysts, budget controllers, and finance managers.

Ideally, attendees will have some familiarity with intermediate Excel topics such as PivotTables or lookup functions such as VLOOKUP() or XLOOKUP(). **There is no coding experience required to attend this workshop.**

Workshop Highlights

- **Power Query in FP&A:** Understand the ETL process and its relevance in financial data management.
- **Power Pivot for Financial Reporting:** Learn to build efficient data models and reports for financial analysis.
- **Dynamic Array Functions for Financial Analysis:** Utilize advanced Excel functions for responsive financial calculations.
- **Augmented Analytics in Excel:** Explore predictive analytics and AI applications in financial planning.
- **Python Integration for Financial Processes:** Automate and enhance financial analyses using Python.

About your instructor

- George Mount, founder of Stringfest Analytics
- Author of *Advancing into Analytics* (O'Reilly Media, 2021)
- Awarded Microsoft's Most Valuable Professional (MVP) award for technical excellence & community contributions



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Get started

To elevate your FP&A capabilities with modern Excel, contact us to begin your journey into advanced data analytics and reporting in Excel.

Drop me a line at <https://stringfestanalytics.com/contact/> and I'll be in touch shortly to get started. To help me get an accurate proposal to you quickly, please let me know the number of participants you expect, your preference for online vs onsite, whether you have custom datasets you'd like to feature or any special requests.

I look forward on build your team's productivity and value with Excel together.



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