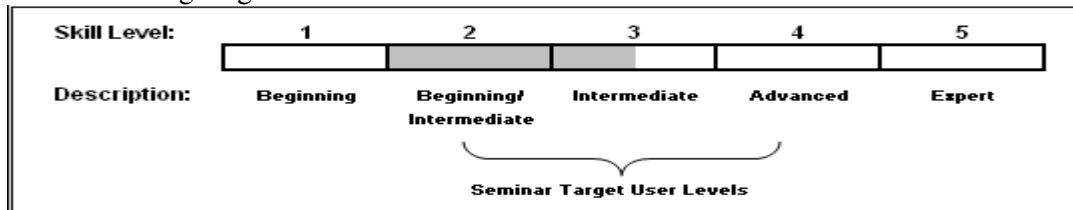


# **Excel Tips and Techniques for Increased Productivity and Improved Financial Modeling: INTERMEDIATE+**

## **COURSE DESCRIPTION:**

This 1-day ON-SITE SEMINAR features **Intermediate to slightly Advanced** selected coverage of Microsoft® Excel. The course is primarily designed to train finance and accounting team members in the best features, commands, and functions of Excel. A primary objective of the seminar is to teach **faster, more efficient methods** of accomplishing everyday Excel tasks. Participants will also be exposed to **more efficient financial modeling and application techniques**, using real world examples. Demo files are provided to each participant along with a binder containing copies of presentation slides and a copy of my Excel book “Navigating the Road to EXCEL-lence”. 6.0 Hours CPE



### **Major topics covered:**

- Summary of new features and capabilities in the latest Excel versions
- Setting up the Quick Access Toolbar (QAT) to maximize productivity
- The Camera feature; Grouping and Outlining; Important “F” keys
- Introduction to Macros; creating a global macro using the recorder, simple editing of VBA code
- Proven timesavers (lots of shortcut tips, many not found in manuals)
- Formatting tips for better looking spreadsheets
- AutoFill, TEXT manipulation functions, “smart text”, tips and tools, building “Mega” formulas
- Understanding powerful built-in functions (VLOOKUP, SUMIF(S), CONCATENATION, etc)
- Using FORMS (e.g. ListBoxes, Spinners, etc.) to enhance usability
- Data Validation and Conditional Formatting
- Goal Seeking (backsolving)
- Sorting, Filtering, Subtotaling; Creating dynamic charts
- Tips and techniques for combining features and functions; creating a CM/YTD Variable Summation model with Dynamic Headers, building a Labor Budget model, demo of a 3-year generic business financial planning model, architecture tips, etc.
- External links...pitfalls and solutions; Protection techniques; Check totals
- AND MUCH MORE, plus answering individual questions as time permits.

### **About the instructor:**

Eric Augusta has over 25 years of business finance experience, having held positions as CFO, VP Financial Planning, VP Strategic Planning, Controller, Accounting Manager, and Financial Analyst, at both large companies (Xerox, Ford) and smaller, entrepreneurial organizations (Century Computer Marketing, Cerplex, Aurora Electronics). He is a certified Excel Expert, an instructor at UCLA Extension and at CalCPA Education Foundation. His unique combination of technical Excel knowledge and business experience makes this seminar a must for any Excel user wanting to become more productive quickly and learn valuable new modeling and productivity techniques. Mr. Augusta holds an MBA in Finance (Wharton, University of Pennsylvania) and a BA in Economics (Cornell University).

**Cost\*** (held at your company location in the greater Los Angeles area): \$250 per person, minimum 4 persons includes all course materials. Attendees 5 and above are \$150 for each additional participant.

*\*Pricing subject to change without notice*

### **Contact information:**

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