



Clarity  
Bespoke Excel Training



## Gain clarity, gain mastery of Microsoft Excel

*Bespoke Excel Training from Clarity Consultancy Services*

**Bespoke Excel Training** - The most effective way to make the most of Microsoft Excel. Spreadsheet training tailored to your needs, delivered by experts.

Our trainers are qualified accountants who are experts in developing Excel models to recognised best practice standards. Importantly, they are also business consultants and therefore understand how best to apply Excel in the business environment.

### Our clients



Hamilton Hotel Partners



**Bristol Old Vic**



**Marcussen**  
Consulting

[www.BespokeExcelTraining.co.uk](http://www.BespokeExcelTraining.co.uk)

## Client feedback

### Hamilton Hotel Partners

"We have spent a long time looking for the right training company to deliver our excel training.

In Clarity we found just what we were looking for - tailor made excel training for each and every one of our employees. Not only did we get excellent excel training at all levels, but they also understood how we were using excel in our work, making the sessions much more relevant.

We would highly recommend Clarity and will certainly continue using them in the future."

*Bettina McLean, Senior Associate, Hamilton Hotel Partners Ltd*



"Great to meet you today and thanks for the course. We all really valued it and are looking forward to being more efficient with Excel!

I'm sure we will be seeing more of you and your team in the future."

*David Marcussen, Owner, Marcussen Consulting.*

## KOHLER.

"My team and I found our bespoke Excel training course covered everything we had requested and more. It was perfectly pitched for the various abilities in the group and the materials are very useful.

Our trainer was very knowledgeable and able to work with our real life scenarios as well as the course content examples."

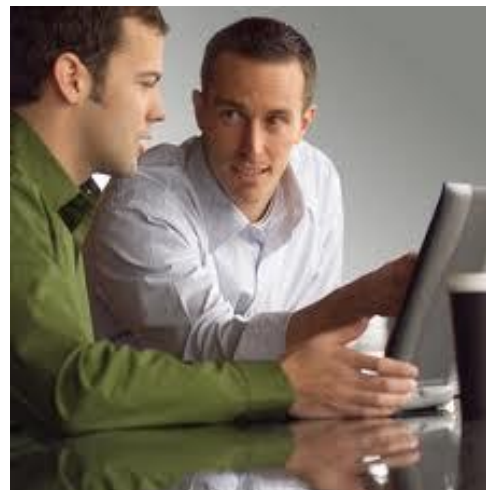
*Sally Lawrance, Senior Marketing Manager, Kohler Mira Ltd*

## Our approach

We understand that every company and every individual has different training needs. For this reason we do not offer standard or public Excel courses. We offer bespoke Excel courses tailored to the needs of your business and your employees.

Our bespoke Excel courses allow your team:

- to focus on their own problem areas
- to better understand the range of solutions Excel offers
- to become more efficient and productive using Excel
- to gain real and quantifiable value



Following a training needs assessment, we will propose a selection of modules that we feel will deliver maximum benefit to your team.

For a large team we can develop a timetable spread over a number of days that delivers both flexibility and great value for money.

Where possible we work with examples of your data as this helps to bring the training into the context of your business.

Each individual will be provided with a training manual for the modules undertaken. We also provide your team with a USB stick so that they can save their own versions of the examples and exercises for future reference.

## Contact details

For further information, or to book a bespoke course, call us on **01225 350730**. Alternatively you can email us at [enquiries@bespokeexceltraining.co.uk](mailto:enquiries@bespokeexceltraining.co.uk).

**[www.BespokeExcelTraining.co.uk](http://www.BespokeExcelTraining.co.uk)**

## Bespoke Excel Training – Modules overview



We have developed an extensive range of beginner, intermediate and advanced modules.

By selecting the modules that meet your team's needs we can focus the training to deliver maximum benefit and long term results.

A full list of our modules can be found below:

### Beginner modules

#### An introduction to Excel

Duration:	Half day
Pre-requisites:	Competent with basic computer functionality
Learning Objectives:	This module will give you an overview of what Excel is, what you can use it for and introduce you to the basic functions.
Content:	<ul style="list-style-type: none"><li>• An overview of the Excel workspace (Ribbon, Quick Access Toolbar, Formula bar and workbook window)</li><li>• Navigating your way around Excel</li><li>• File management (open, create a new file, save, close and print)</li><li>• Simple functionality (entering data, basic formulae, selecting cells, rows and columns)</li></ul>

#### Modifying a worksheet

Duration:	Half day
Pre-requisites:	An understanding of Excel's basic functionality
Learning Objectives:	You will learn how to make basic changes to a worksheet. By the end of this module you will be able to create and modify a simple worksheet.
Content:	<ul style="list-style-type: none"><li>• Add and edit data</li><li>• Basic formulae</li><li>• Formatting (Font, borders, alignment)</li><li>• Copy, Cut and Paste</li><li>• Tables</li><li>• Sort and filter</li></ul>

#### Developing a workbook

Duration:	Half day
Pre-requisites:	A basic knowledge of Excel
Learning Objectives:	You will learn how to build a workbook and link between the sheets in your workbook. This will provide you with the building blocks to start building your own simple models.
Content:	<ul style="list-style-type: none"><li>• Overview of workbooks and worksheets</li><li>• Modifying a workbook</li><li>• Linking worksheets within a workbook</li></ul>

#### An Introduction to charts

Duration:	1.5 hours
Pre-requisites:	A basic knowledge of Excel
Learning Objectives:	You will learn how to create simple charts in Excel
Content:	<ul style="list-style-type: none"><li>• Setting up and selecting data</li><li>• Creating a simple chart</li><li>• Different chart types</li><li>• Modifying charts</li></ul>

## Intermediate modules – Excel functionality

### Tables

Duration:	1.5 hours
Learning Objectives:	Tables were one of the most significant features introduced in Excel 2007. You will learn how to harness their power.
Content:	<ul style="list-style-type: none"><li>• What is a Table?</li><li>• Creating a Table</li><li>• Modifying a Table</li><li>• Working with Tables</li></ul>

### Named ranges

Duration:	1.5 hours
Learning Objectives:	The named range function allows you to assign a name to a cell or range. You will learn how to assign a name to a range and how to reference them.
Content:	<ul style="list-style-type: none"><li>• The case for using named ranges</li><li>• Creating a named range</li><li>• Referencing a named range</li></ul>

### Data validation

Duration:	1.5 hours
Learning Objectives:	Data validation allows you to control the inputs made by the end user. You will learn how to create validations in your spreadsheets.
Content:	<ul style="list-style-type: none"><li>• Types of validation</li><li>• Create validations</li><li>• Drop down lists</li><li>• Linking to named ranges</li><li>• Validation messages</li></ul>

### What if analysis

Duration:	1.5 hours
Learning Objectives:	Master Excel's scenario tools.
Content:	<ul style="list-style-type: none"><li>• Manual what-if analysis</li><li>• Using the camera tool and watch window</li><li>• Data table</li><li>• Scenario Manager</li><li>• Goal Seek</li><li>• Solver</li></ul>

### Working with external data

Duration:	1.5 hours
Learning Objectives:	You will learn how to import data from text files and Access into Excel.
Content:	<ul style="list-style-type: none"><li>• Import a text file</li><li>• Microsoft query</li><li>• Pivot Tables based on external data</li></ul>

### Worksheet sharing and protection

Duration:	1.5 hours
Learning Objectives:	You will learn how to share and protect your workbooks.
Content:	<ul style="list-style-type: none"><li>• Sharing workbooks</li><li>• Protecting worksheets and workbooks</li><li>• Protecting VBA code</li></ul>

## Pivot Tables

Duration:	1.5 hours
Learning Objectives:	You will learn how to harness the power of Pivot Tables and turn your data into information that you can action.
Content:	<ul style="list-style-type: none"><li>• Creating a data table</li><li>• Creating a Pivot Table</li><li>• Turn your data into information</li><li>• Using external data</li><li>• Grouping</li><li>• Pivot Charts</li></ul>

## Conditional formatting

Duration:	1.5 hours
Learning Objectives:	You will learn how to highlight cells based on determined values and how to use the new features introduced in Excel 2007.
Content:	<ul style="list-style-type: none"><li>• Conditionally formatting a cell or range based on its value</li><li>• Conditionally formatting a cell or range based on a formula</li><li>• Visualisation using conditional formatting (2007)</li></ul>

## An introduction to VBA

Duration:	1.5 hours
Learning Objectives:	You will learn the building blocks of VBA programming and then learn how to create some simple but very useful macros.
Content:	<ul style="list-style-type: none"><li>• Developer Toolbar</li><li>• Recording Macros</li><li>• Visual Basic Editor</li><li>• Variables</li><li>• Useful examples</li></ul>

## Intermediate Modules – Excel Functions

### Logical functions

Duration:	1.5 hours
Learning Objectives:	You will learn how to use these core formulae.
Content:	<ul style="list-style-type: none"><li>• IF</li><li>• AND</li><li>• OR</li><li>• Nesting and combining IF AND &amp; OR</li></ul>

### Lookup functions

Duration:	1.5 hours
Learning Objectives:	You will learn how to use these key formulae for mapping, matching and comparing data.
Content:	<ul style="list-style-type: none"><li>• LOOKUP</li><li>• VLOOKUP</li><li>• HLOOKUP</li><li>• INDEX</li><li>• MATCH</li><li>• INDEX MATCH</li><li>• VLOOKUP MATCH</li></ul>

### Summing based on conditions

Duration:	1.5 hours
Learning Objectives:	You will learn how to master the powerful analytical tool that is SUMIFS.
Content:	<ul style="list-style-type: none"><li>• SUMIFS and COUNTIFS</li><li>• SUMIF and COUNTIF</li></ul>

### Error management functions

Duration:	0.5 hours
Learning Objectives:	You will learn how to manage the risk of errors in your spreadsheets.
Content:	<ul style="list-style-type: none"><li>• The types of error (#DIV/0!, #N/A, #VALUE etc)</li><li>• Error handling formulae (IFERROR, ISNA, ISERROR etc)</li></ul>

### Working with text


Duration:	1.5 hours
Learning Objectives:	You will learn how to use the text formulae in Excel.
Content:	<ul style="list-style-type: none"><li>• LEN</li><li>• LEFT</li><li>• RIGHT</li><li>• MID</li><li>• CONCATENATE</li></ul>

### Day, date and time functions


Duration:	1.5 hours
Learning Objectives:	You will learn how to work with days, dates and times.
Content:	<ul style="list-style-type: none"><li>• Date &amp; time formats</li><li>• NOW, TODAY</li><li>• DATE, DATEIF</li><li>• NETWORKINGDAYS</li><li>• DAY, MONTH and YEAR</li></ul>

## Advanced courses


### Spreadsheet modelling best practice

Duration:	Full Day
Pre-requisites:	A sound knowledge of Excel
Learning Objectives:	You will learn how to design and build robust, flexible, efficient and less risky models in Excel. This course has been accredited by the FAST Standard Organisation.
Content:	<ul style="list-style-type: none"> <li>• Spreadsheet risk management;</li> <li>• how to properly structure workbooks (flow input, working, output);</li> <li>• how to properly structure worksheets;</li> <li>• how to build simple, clear and consistent formulae; and</li> <li>• the core principles of the FAST Standard</li> </ul>
Accreditation:	

### The FAST Standard Level 1 Certificate

Duration:	Two days
Pre-requisites:	A sound knowledge of Excel
Learning Objectives:	<ul style="list-style-type: none"> <li>• Understand how to manage spreadsheet risk</li> <li>• Understand the key principles of The FAST Standard</li> <li>• To be able to apply The FAST Standard to your Excel models</li> <li>• To pass The FAST Standard Level 1 Certificate</li> </ul>
Content:	<ul style="list-style-type: none"> <li>• Spreadsheet risk management;</li> <li>• how to properly structure workbooks (flow input, working, output);</li> <li>• how to properly structure worksheets;</li> <li>• how to build simple, clear and consistent formulae; and</li> <li>• the core principles of the FAST Standard</li> <li>• Mock case studies</li> <li>• Example multiple choice questions</li> </ul> <p>This course includes sitting the FAST Standard Level 1 Certificate exam</p>
Accreditation:	

### The FAST Standard Level 1 Certificate – Fast track

Duration:	One day
Pre-requisites:	As this is a fast track course delegates must have a sound working knowledge of the FAST Standard before attending this course
Learning Objectives:	This is a revision course intended to enable existing users of the FAST Standard to pass the FAST Standard Level 1 Certificate
Content:	<ul style="list-style-type: none"> <li>• how to properly structure workbooks (flow input, working, output);</li> <li>• how to properly structure worksheets;</li> <li>• how to build simple, clear and consistent formulae; and</li> <li>• the core principles of the FAST Standard</li> <li>• Mock case studies</li> <li>• Example multiple choice questions</li> </ul> <p>This course includes sitting the FAST Standard Level 1 Certificate exam</p>
Accreditation:	



## Spreadsheet risk management

Duration:	Full day or half day
Learning Objectives:	You will learn how to manage the risk of using spreadsheets within your organisation.
Content:	<ul style="list-style-type: none"><li>• Understand and evaluate your risk profile</li><li>• Managing spreadsheet risk within your organisation</li></ul>

## Spreadsheet auditing techniques

Duration:	Half Day
Pre-requisites:	A sound knowledge of Excel
Learning Objectives:	Undetected errors in Excel spreadsheets provide managers with unreliable information. This can lead to poor business decisions and lost profit. You will learn how to detect errors within spreadsheets.
Content:	<ul style="list-style-type: none"><li>• Understanding and managing spreadsheet risk</li><li>• Auditing spreadsheets</li></ul>

## Contact details

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