

## Advance Excel

### Description

#### **ABOUT THE CLIENT**

Our Client is a global leader in renewable energy and sustainable urban development. Over the last decade, they have pioneered commercially viable solutions in clean energy, sustainable real estate and clean technology in the UAE and around the world. Headquartered in Abu Dhabi, they develop renewable energy projects, realise low-carbon urban development, while advancing clean-tech innovation. They also deliver world-class knowledge and industry platforms.

Client is supporting the UAE's transition towards a knowledge-based economy. Their aim is to be a model for the commercial adoption of clean technologies, and a showcase of the UAE's wider commitment to sustainability.

#### **WHAT BUSINESS CHALLENGE WAS THE CLIENT EXPERIENCING?**

The financial analysts at our client work across diverse verticals to conduct financial reviews and prepare MIS reports using large volumes of data which were to be presented to their key stakeholders regularly. However, it was observed that although these analysts were technically experts but were not able to deliver standardised reports.

Additionally, these analysts had to repeat the same tasks at the end of every month as their existing models lacked automation which added to their time taken in conducting the analysis, therefore creating bottlenecks and reducing efficiency.

The client wanted a learning solution that would:

- Help automate the regular reporting and dashboarding tasks for the analysts
- Provide them with skills and tools they need to create a standardised reporting structure – starting from creation to the presentation of every financial report they create
- Develop agile models which incorporate industry best practices and are flexible to accommodate ad-hoc changes

#### **WHAT SOLUTION DID KAPLAN PROVIDE?**

Advance Excel – MS Power (Business Intelligence) Tool, Power Pivot and Power Query

#### **HOW DID KAPLAN WORK WITH THE CLIENT TO DEVELOP THE SOLUTION?**

- To develop the learning solution, Kaplan used the 'collaborative customization' approach
- The course outline, the content and the learning outcomes were developed by conducting multiple rounds of consultative interviews with key stakeholders of the organization and financial

analysis team

- It incorporated facilitating the participating analysts to create models and generate reports using MS Excel's Business Intelligence Tools thus making it user friendly, flexible and consistent with industry best practices

## **HOW WAS THE TRAINING DELIVERED?**

- The training was delivered face-to-face (F2F) over three days.
- It was interactive and included real-time business scenarios
- Advanced MS Excel training which automated the analysis, dashboarding and reporting tasks for the analysts at Masdar

## **WHAT ASPECTS WERE HIGHLY APPRECIATED BY THE CLIENT?**

- Collaborative customisation of program and content through consultative approach
- Industry experienced trainer, ex-financial modeler, MS Excel expert conducting the interactive delivery
- Incorporating the use of business intelligence tools from MS Excel into the programme in order to leverage the automation abilities
- Comprehensive support material for effective embedding of learning
- Time taken to generate the reports went down from 2 days (prior to training) to 6 hours (after the training was completed)

## **WHAT DID THE CANDIDATES THINK OF THE PROGRAMME?**

- *"Great theory & descriptive hand-outs to support the different exercises & calculations done throughout excel sheets (e.g. what are the different financial ratios calculated together, then also what is its interpretation to the business or our renewable energy business & industry). Amazing Instructor- only wished we had more time & more content to cover!"*
- *"The instructor was so interactive and kept all audience engaged all the time"*

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### **Author**

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