

BUSINESS ANALYTICS AND DASHBOARDS

Key Benefits

- Produce robust, reliable and interactive models in a fraction of the time
- Reduce the regular reporting cycle from days to minutes
- Create insightful visual reports and dashboards that power user decision making

ANALYTICS AND THE FUTURE OF FINANCE

There is an increasing focus on business analytics across the entire world of business and commerce. It is becoming a critical part of the overall management strategy and a key driver of business performance.

The ability to effectively analyse and create actionable information from the growing volume of data is a critical skill for accountants and finance professionals. It is a necessity for the future role of finance in business partnering, performance management and decision support.

Today's finance professionals face three major challenges in achieving this:

- Too much time lost carrying out routine reporting
- Information produced not matching users' needs for decision making
- Perceived need for expensive, specialist software.

WHAT YOU WILL LEARN FROM THESE TWO COURSES

i3BAR teaches you to create Excel models that automate reporting and reduce routine reporting time from days to minutes.

i2VSA teaches you to create and present information visually and in dashboards to provide greater clarity and insights for more informed decision making.

You will learn how to build and tailor solutions using only standard MS Excel spreadsheets, with no additional software or licences required.

WHO SHOULD ATTEND

Suitable for all accounting and finance professionals.

Applicable to those who need to produce financial and non-financial information for board level/senior stakeholders.

Anyone who wants to better position themselves to support or lead future analytics and reporting projects in their organisation (Excel or systems based).

It is recommended that i3BAR participants should have at least two years prior experience working with MS Excel.

Top 7 reasons why people recommend these courses

SIGNIFICANT REDUCTION IN REPORTING TIME

"With the new model, the time spent on preparing the report is reduced from 2 days to under half a day. My superior is also impressed with the improved accuracy and presentation, my team are more motivated now."

HZ Zheng, VP Finance of a global bank

ACTIONABLE INFORMATION

"My model has created a lot of buzz in the board meetings as they have never seen something like this before."

Claire Richardson, CFO

SIMPLICITY!

"A fully interactive model by using simple excel functions. The sustainability is amazing as the model can be used in future years with very simple updates required."

Kate Davis, Management Accountant

100% DATA INTEGRITY

"We are now regarded as the authority when it comes to numbers."

Johnny Teo, Finance Manager

BIG SYSTEMS PERFORMANCE WITHOUT THE COST

"We had big plans that required a big system, until we attended this course, all these are now made possible. It is no longer just a dream! And it does not cost millions of dollars to invest in sophisticated systems. The knowledge gained is invaluable"

Victor Evans, FD, Healthcare

INTERACTIVE REPORTING WITH DRILL DOWN

"Instead of giving management tonnes of numbers and tables to read previously, the interactive charts and visuals make report reading a joy rather than a chore. Management is able to obtain prior months/quarters figures with a click of a button."

Phyllis Chin, FP&A

90% FILE SIZE REDUCTION

"I was already using Excel extensively before the course and my biggest file was 30MB. I was skeptical as everything seemed so simple, but the thinking behind this course is amazing! I was convinced that I can achieve equal if not more powerful results with simple functions. Now that same file is only 3MB, faster, nicer and the management loves it."

David Miller, Head of Business IT

TWO COURSES: ONE END-TO-END SOLUTION



i3BAR The Certificate in Business Analytics and Reporting course includes 3 days face-to-face training with a hands-on case study starting from multiple data sources to completing an interactive MS Excel model for reporting and simulation.

i2VSA The Certificate in Visual Analytics and Dashboards course includes 2 days face-to-face training with practical case studies and reporting techniques. From learning how to solve single requirements and problems, participants will progress to designing powerful single page dashboards.

TYPICAL PROBLEMS IN PREPARING REPORTS	i3BAR SOLVES THIS THROUGH
Self-taught or through MS Excel courses focused on functions and programming	Worldwide best practice methodology for MS Excel. A corporate model-building standard for leading organisations.
Unnecessarily complex models, too hard to maintain, too large, too slow and prone to crashes and data loss	i3BAR uses simple formula and 3-block structure of data, logic and reporting. Produces reliable, robust and maintainable models.
Too much time spent in routine reporting	Automation can reduce the regular reporting cycle from hours and days to a few minutes.
Reports not easily understood and don't answer what-if questions	Reports you can present interactively from MS Excel, answering questions in real time. Users can use buttons, sliders, drop downs and other interactivity to carry out their own analysis directly.

TYPICAL PROBLEMS IN PRESENTING REPORTS	i2VSA SOLVES THIS THROUGH
Multi-page reporting packs - but can't see the 'big picture'	Building dashboards that reveal big picture performance in one page.
No new insights and no focus for action	Advanced presentation techniques and combinations to give better insight and prioritise actions.
Lack of a structure and "story" to the information will increase the risk of poor decision making	Structuring dashboards and reports to tell a story, to highlight key messages and to support better decision making.
Poor choice of display techniques, colours and badly presented reports/dashboards	Understanding key workings of human memory and visual processing drive best practice in techniques, use of colour, layout of reports and dashboards.
Finance not seen as the key business partners for critical decision making	Improve users ability to make better and informed decisions with relevant information and analytics.

*No additional software or licences required for either course, only MS Excel. Includes an optional post course project to earn a Certificate of competency in Business Analytics.

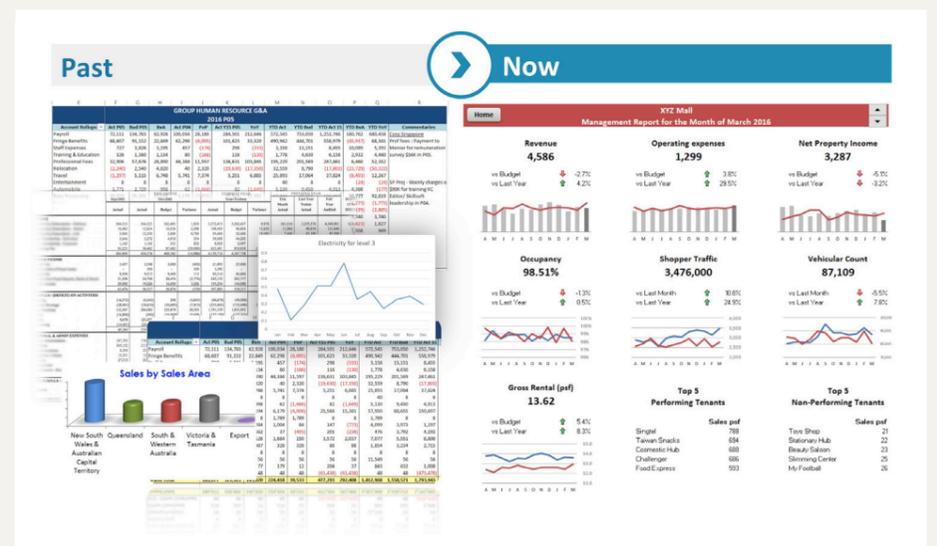
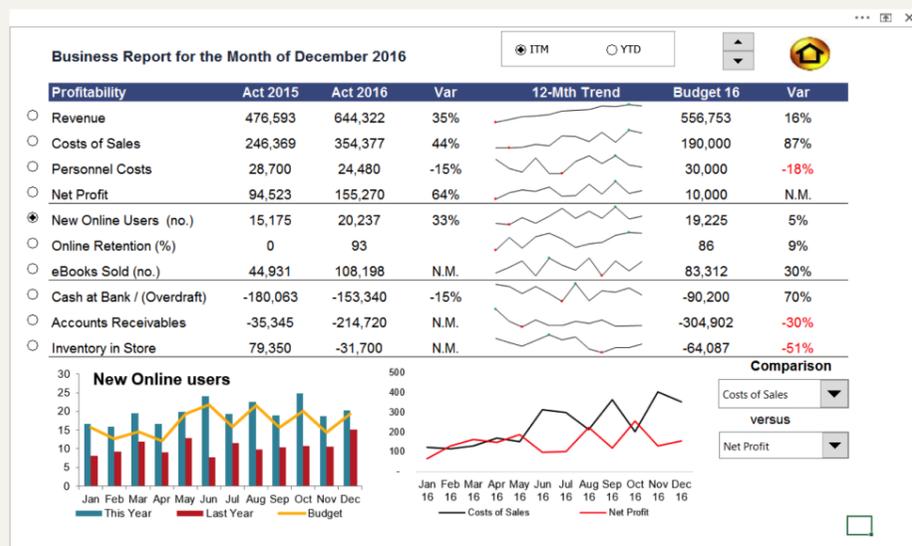
*No additional software or licences required for either course, only MS Excel. Includes an optional post course project to earn a Certificate of competency in Visual Analytics.

LEARNING OBJECTIVES

- Integrate data from disparate data sources into MS Excel
- Build reliable and sustainable MS excel-based reporting models
- Construct interactive models for decision making
- Create scenarios and what-if analysis for simulations, appraisals and planning models

LEARNING OBJECTIVES

- Create reports and dashboards that deliver the big picture view
- Better insights and clearer focus for action
- Selecting and combining the right visual techniques and structure for each situation
- Producing effective reports and dashboards for management to make better decisions



For workshop dates and to register, call **6671 6500** or visit cpaaustralia.com.au/analytics

These courses are delivered by Transformation Analytics at CPA Australia office. One Raffles Place, #31-01 One Raffles Place, Singapore 048616

ABOUT TRANSFORMATION ANALYTICS

Our Mission: **Transforming Finance Professionals into Analytics Leaders**

Extensive experience in industry, consulting and in building effective solutions is encapsulated into our training which is certified by the Institute of Business Analytics (IBA) and offered internationally across Asia, Europe and North America. Our public courses are delivered through local accounting institutes and training providers. Thousands of professionals have been empowered and inspired to transform their own organisations without dependencies on complex and expensive software solutions.



Elaine Chong is an international speaker, public and corporate trainer in business analytics and best practice reporting using Excel. Elaine has extensive experience and numerous awards and recognition from her work in industry. Her training and inspiration has led many of her students to make dramatic improvements in their performance and careers. Elaine is a Chartered Accountant, MBA and Certified Master Trainer.



Simon Lindley is an international speaker, trainer, and consultant in business transformation through analytics. He brings expertise in visual analytics and dashboard design to transform the role and performance of finance professionals and teams. Simon is a Chartered Accountant, Chartered Engineer (IT) and MBA with a Masters diploma in corporate governance. He also has training and qualifications in statistics and data science.

For more content and to view demos, visit transformationanalytics.com