



COLLEGE AFRICA GROUP

AI | TRAINING | CONSULTING | SKILLS DEVELOPMENT

Better Processes. Stronger Skills. Smarter AI.

Advanced Excel — What-If Analysis, XLOOKUP & Business Modelling

Part 2 of the Advanced Excel Pathway

Move from Reporting What Happened to Exploring What Could Happen

Advanced Excel Part 2 is a practical course for experienced Excel users who need to move beyond reporting historical information and start using Excel to test assumptions, compare alternatives, investigate exceptions and support better business decisions.

Delegates learn how to work backwards from targets, model different scenarios, test the effect of changing assumptions and retrieve and analyse supporting business information.

The emphasis is practical: understand the business question, choose the appropriate Excel technique, model the alternatives and interpret what the result means.

Who Should Attend?

For experienced Excel users involved in finance, accounting, budgeting, forecasting, sales, operations, planning, reporting, projects and management decision support.

Delegates should already be comfortable with formulas, cell references, business datasets and common Excel analysis techniques.

Advanced Excel Part 1 or equivalent practical experience is recommended.

Course Content

1. Goal Seek — Work Backwards from a Target

When you know the result you need but not the input required to achieve it, Goal Seek allows Excel to work backwards.

- Required sales, price, profit or margin
- Break-even and target calculations
- Testing different business targets

The job: Answer questions such as “What would have to change for us to achieve this result?”

2. Scenario Manager — Compare Alternative Outcomes

Business decisions are rarely based on one fixed set of assumptions. Use Scenario Manager to build and compare different combinations without repeatedly changing the original model.

- Conservative, Expected and Growth scenarios
- Changing multiple assumptions
- Scenario Summary reports

The job: Compare possible outcomes before deciding which assumptions or plans deserve further attention.

3. Data Tables — Test How Sensitive the Result Is

A model may look attractive until an important assumption changes. Data Tables show how a calculated result responds to a range of possible inputs.

- One- and two-variable Data Tables
- Price, volume, cost and margin sensitivity
- Interpreting how changing assumptions affect the result

The job: Understand which assumptions matter most and how vulnerable the result is when they change.

4. XLOOKUP — Retrieve Business Information More Flexibly

Part 1 develops lookup skills using VLOOKUP, which remains common in existing corporate workbooks. Part 2 progresses to XLOOKUP for more flexible modern lookup requirements.

- Exact and approximate matching
- Looking left or right
- Handling missing results
- Retrieving information for analysis and business models

The job: Bring the correct supporting information into a calculation or model without repeatedly searching, matching and copying data manually.

5. Multi-Criteria Analysis

Real business questions frequently involve several conditions rather than one. Delegates extend the conditional calculations introduced in Part 1 using SUMIFS and COUNTIFS.

- SUMIFS and COUNTIFS
- Analysing combinations such as department, region, product and reporting period
- Practical multi-criteria business questions

The job: Answer more specific questions such as “What happened in this region, for this product, during this period?”

6. Find the Records and Exceptions That Matter

Large datasets can contain the answer while making it difficult to see which records deserve attention. Delegates use Advanced Filter and advanced Conditional Formatting to focus the analysis.

- Complex criteria and targeted record extraction
- Formula-based Conditional Formatting
- Highlighting targets, variances and exceptions
- Sparklines for compact trend indicators where appropriate

The job: Spend less time searching through rows of information and more time investigating the records, variances and trends that matter.

7. Integrated Business Modelling Project

The course culminates in a realistic business model involving budgets, actuals, costs, prices, sales volumes, margins and management targets.

Delegates combine the techniques covered during the course to retrieve supporting information, calculate results, work towards targets, compare scenarios, test sensitivity and identify important exceptions.

The objective: understand the business question, select the appropriate Excel techniques, test the important assumptions and explain what the analysis means for the decision.

After the Course

- Work backwards from a business target
- Build and compare alternative scenarios
- Test how sensitive results are to changing assumptions
- Retrieve supporting information using XLOOKUP
- Analyse information using multiple business criteria
- Identify important targets, variances, exceptions and trends
- Combine several Excel techniques within a business model
- Interpret results and use Excel more effectively for planning and decision support

Training Format

Duration: One day — normally 09h00 to approximately 15h30

Delivery: Onsite instructor-led training or live virtual instructor-led training using Microsoft Teams

Practical methodology: See it → Understand it → Practise it → Apply it → Check it

Delegates receive a course manual and electronic Certificate of Attendance. Corporate group training can place additional emphasis on applications relevant to finance, budgeting, sales, operations or other business functions.

Advanced Excel Pathway

Part 1 — Formulas, Data & Reporting

Calculate, analyse and report. Build reliable formulas, work more effectively with business data and turn larger datasets into useful information.

Part 2 — What-If Analysis, XLOOKUP & Business Modelling

Model and decide. Test assumptions, compare alternatives and use Excel to explore possible business outcomes.

Part 3 — Modern Excel 365, Dynamic Formulas & Automation

Modernise and automate. Use modern Microsoft 365 Excel capabilities, dynamic formulas and introductory automation to reduce repetitive spreadsheet work.

Continue Your Excel & Data Journey

Power Query — Data Preparation & Reporting Automation

Prepare, transform and automate. For users who repeatedly import, clean, restructure or combine data and need a more repeatable approach to preparing information for reporting.

Not every repetitive Excel problem needs another formula. When the recurring problem is preparing and combining the same data every reporting cycle, Power Query may be the more appropriate next tool.

What our clients say about us

Regards

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