

**FINANCIAL ACUMEN:**
FINANCIAL ANALYSIS SERIES

Financial Analysis II: Insights through Data Analytics

COURSE LENGTH

Two 2-Hour Virtual Sessions or
One Half-Day In Person

DESCRIPTION

The application of financial analytics is the process by which data is converted into key insights that can inform decision makers, improve performance, and guide business strategy. Financial analytics allow individuals to derive value by answering four key questions: (1) What happened? (2) Why did it happen? (3) What's happening now? and (4) What might happen in the future? As a natural follow-up to the Financial Analysis: Critical Thinking and Decision-Making course, this seminar provides hands-on training using Microsoft Excel to evaluate financial data for value-added decision-making. Participants will gain insight in when and where to use key financial analytics. Participants will also be introduced to elements of data mining by using pivot tables in Excel.

LEARNING OBJECTIVES

- Apply analytics to understand profitability in the context of top-line and bottom-line growth
- Use analytics to perform a bridge analysis of actual and forecasted results
- Evaluate revenue and expense information using descriptive analytics and time series analysis
- Perform sensitivity analysis to assess possible future outcomes of different strategic choices

SAMPLE AGENDA

- What is Business Analytics?
 - Overview of available analytics tools
 - Perspectives for using analytics
- Profitability Analysis
 - Using graphs and charts to present data in Excel
 - Building an analytics score card
- Bridge analysis
 - When should you use bridge analysis?
 - Performing a bridge analysis in Excel
- Data Mining & Pivot Tables
 - Importance of data mining
 - Conducting a pivot table analysis in Excel
- Detailed Revenue & Expense Analysis in Excel
 - Descriptive statistics and moving averages
 - Relationship mapping, correlation and scatterplots
 - Rate of change, conditional, and net margin analysis
- Sensitivity analysis
 - Goal seek in Excel
 - One- and two-way tables in Excel