

Excel & VBA: Course Outline

Description: The Excel & VBA course shows students and professionals how to use Excel shortcuts, formatting, formulas, graphs, data analysis, and task automation to build financial models and analyze data for common tasks in finance roles, such as customer due diligence. A custom Quick Access Toolbar (QAT) and Excel macro package are also included to accelerate the most common tasks.

Objectives: By the end of the course, students will be able to use Excel without the mouse and will feel comfortable formatting spreadsheets and using the most common financial and lookup functions. They will also have a good understanding of graphs and charts, pivot tables and Power Pivot, and some knowledge of VBA and macros for automation.

Target Audience: Undergraduates, MBA students, interns, and new hires. This is a beginner-to-intermediate-level course intended for anyone new to Excel or anyone who wants to review the fundamentals.

Duration: 10 – 20 hours (various study plans are available for different time commitments).

Outline:

- **Module 1: Intro, Setup, and Navigation (Separate PC and Mac Versions) (2.0 Hours)** – Students learn how to set up and optimize their system and Excel settings and how to navigate, use the ribbon menu, access the format dialog box, and use the key shortcuts for cells, rows, and columns. They'll also learn to enter formulas, text, and numbers, use absolute and relative references, name and jump to cells, and manipulate worksheets.
- **Module 2: Formatting and Printing (Separate PC and Mac Versions) (2.5 Hours)** – This module teaches the key shortcuts for formatting, how to use built-in number formats, and how to use date, time, and text manipulation functions. Students also learn how to clean up data, set up custom number formats, format financial models, and use conditional formatting that changes entire rows based on the contents of individual cells.
- **Module 3: Financial Formulas and Lookup Functions (Combined PC/Mac) (6.0 Hours)** – These lessons teach students about the key functions and formulas required for financial modeling in Excel, including logical, arithmetic, and financial functions, as well as INDEX, MATCH, INDIRECT, and XLOOKUP. They will practice these functions across several exercises and learn to use dynamic array functions, CHOOSE and OFFSET, sensitivity tables, and Goal Seek and Solver.
- **Module 4: Data Manipulation and Analysis (Combined PC/Mac) (3.0 Hours)** – This module teaches students how to manipulate and analyze data in Excel, including data tables, sorting and filtering, Power Query, SUMIFS, SUMPRODUCT, and database functions. It also features lessons on pivot tables and Power Pivot and practice exercises for tables, visualizations, and Calculated Columns and Measures to build KPIs.

- **Module 5: Charts and Graphs (Combined PC/Mac) (2.5 Hours)** – Students learn to set up charts and graphs in Excel, ranging from the basic line and column charts up through dynamic charts with checkboxes and scroll bars. They learn how to create valuation multiple graphs, “football field” valuation charts, price-volume graphs, and waterfall bridge charts to analyze companies’ financial results. The last few lessons cover dynamic pie charts and combo charts using INDEX/MATCH and form controls in the Developer Toolbar.
- **Module 6: VBA and Macros (Combined PC/Mac) (6.0 Hours)** – This module teaches VBA and macros, including concepts such as loops, range and cell manipulation, variables and constants, arrays and dictionaries, and string manipulation. Students will create macros for “Input Box” cell creation and the color-coding and printing of financial models, and they’ll expand on these by writing macros to cycle number formats, change the decimal places for numbers in different formats, flip the signs, and flash fill right and down. They’ll also write macros to toggle the error-wrapping, toggle absolute vs. relative vs. mixed references, go to the min and max of a range, create Tables of Contents, and create Price-Volume Graphs.

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