The Association of Accountants and Financial Professionals in Business

IMA Excel: Data Analytics – Leveraging Excel

Understanding how to use data to create value within an organization is key to the achievement of competitive advantage. Management accountants are often called upon to assess and analyze data to predict key trends that assist in educated business decisions.

This course will define the various types of analytics that create value in an organization. Exploring descriptive, diagnostic, and predictive analytics, Bill Jelen, renowned Excel expert, will leverage various Excel® tools that will help guide you through the analysis of data in order to gain better insight and create added business value.

This self-study, video-based course includes downloadable practice spreadsheets that enable users to replicate functionality and test your new Excel skills in data analytics.

Note: This course is designed and instructed using features found in Excel 2013, Excel 2016, and Excel 365. Working in these platforms will be necessary to duplicate course contents.

Learning Objectives:

Upon completion of this course, you should be able to:

1. Describe how value is created through descriptive, diagnostic, and predictive analytics.
2. Construct descriptive analyses using pivot tables, graphing, and Excel artificial intelligence.
3. Develop diagnostic analyses using customer-segmentation, what-if analysis, and multivariable regression.
4. Formulate predictive analysis using exponential trend smoothing.

Delivery Method: QAS Self-Study

CPE Credit: 3.5 NASBA CPE credits

Field of Study: Computer Software & Applications

Knowledge Level: Intermediate

Prerequisites: A working understanding of Excel and database usage.

Advance Preparation: None

Release Date: 7/17/2018

NASBA CPE information and Complaint Resolution and Refund Policy:
https://www.imanet.org/career-resources/nasba-cpe-requirements?ssopc=1

The Association of Accountants and Financial Professionals in Business

IMA Excel: Prescriptive Analytics

Understanding how to use data to create value within an organization is key to the achievement of competitive advantage. Management accountants are often called upon to assess and analyze data to predict key trends that assist in educated business decisions.

This course will define the various types of analytics that create value in an organization. Bill Jelen, renowned Excel expert, will demonstrate practical ways to use predictive analytic tools to perform prescriptive analytics that provide valued foresight required in today's digital business environment.

This self-study, video-based course includes downloadable practice spreadsheets that enable users to replicate functionality and test your new Excel skills in data analytics.

Note: This course is designed and instructed using features found in Excel 2013, Excel 2016, and Excel 365. Working in these platforms will be necessary to duplicate course contents.

Learning Objectives:

Upon completion of this course, you should be able to:

1. Identify the value-added stages associated with data analytics.
2. Develop forecasting using Excel's "Moving Averages" technique.
3. Create prescriptive analytics leveraging Excel's "Problem Solver" intelligence tool.
4. Set up "Monte Carlo" simulations using Excel.

Delivery Method: QAS Self-Study

CPE Credit: 3 NASBA CPE credits

Field of Study: Computer Software & Applications

Knowledge Level: Intermediate

Prerequisites: A working understanding of Excel and database usage.

Advance Preparation: None

Release Date: 7/11/2018

NASBA CPE information and Complaint Resolution and Refund Policy:
https://www.imanet.org/career-resources/nasba-cpe-requirements?ssopc=1