

Advanced Excel, AI Analytics and Strategic Sales Mastery

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Course Overview

The Advanced Excel, AI Analytics and Strategic Sales programme equips professionals with the analytical techniques required to turn commercial, customer, and financial spreadsheets into practical business decisions. Participants learn how to clean, structure, and model large datasets in Excel before connecting their calculations to artificial intelligence tools that uncover operational trends and support commercial planning. The curriculum addresses sales revenue, receivables ageing, client payment habits, and pipeline conversions to give commercial teams a complete perspective on operational performance. Instruction is delivered through practical data demonstrations and applied scenario modelling led by Agile Leaders Training Center.

Target Audience

- Sales managers, supervisors, and commercial directors seeking quantitative control over revenue figures.
- Key account managers and business development specialists managing complex client portfolios.
- Financial analysts and accounts receivable supervisors monitoring billing cycles and credit risks.
- Commercial operations analysts and business intelligence specialists building operational reports.
- Revenue managers and planning professionals responsible for sales forecasting and management reporting.

Targeted Departments and Industries

This programme delivers cross-functional value to teams handling quantitative commercial records, financial reconciliations, and strategic client management across diverse sectors.

- Commercial Operations and Sales Planning Divisions
- Finance, Credit Control, and Accounts Receivable Teams
- Business Intelligence and Revenue Operations Departments
- Key Account Management and Business Development Units
- Banking, Financial Services, and Insurance Institutions
- Wholesale Distribution, Logistics, and Manufacturing Enterprises
- Technology, Telecommunications, and Professional Services Providers

Course Objectives

By the end of this course, participants will be able to:

- Structure, cleanse, and validate commercial datasets using Excel data verification tools.
- Apply advanced logical tests, dynamic reference lookups, and multi-condition formulas.
- Conduct receivables and debt ageing analysis alongside invoice payment trend reviews.
- Assemble interactive PivotTables, dynamic charts, and executive sales and receivables dashboards.
- Formulate balanced key performance indicators covering sales volume, margins, and collection efficiency.
- Deploy artificial intelligence prompts to evaluate operational datasets and surface underlying patterns.
- Produce validated AI-assisted sales forecasting models while maintaining data confidentiality.
- Formulate structured account planning frameworks based on quantitative account segmentation.

Course Agenda

Day 1: Advanced Excel for Commercial Data Preparation

- Structuring business tables and enforcing structural consistency across worksheets
- Cleansing raw transactional exports and handling missing or anomalous values
- Applying dynamic array functions, nested logical expressions, and modern lookup formulas
- Managing large data tables with automated filters, sorting indices, and conditional formatting
- Auditing formula dependencies and eliminating data validation errors
- Preparing clean commercial datasets for downstream analysis and reporting

Day 2: Sales, Revenue and Receivables Analysis

- Evaluating sales performance across regional territories, product groups, and sales channels
- Reconciling periodic performance targets against actual commercial achievements
- Analyzing customer payment behaviours, outstanding balances, and collection cycles
- Performing receivables and debt ageing analysis to identify working capital risks
- Mapping invoice settlement timelines to isolate recurring payment bottlenecks
- Synthesizing sales volumes, margins, and credit exposures into unified performance tables

Day 3: Interactive Dashboards and Management Reporting

- Designing multi-source PivotTables for multidimensional commercial summaries
- Building dynamic PivotCharts with slicers, timelines, and customized calculation fields
- Designing commercial key performance indicators for executive management review
- Structuring visual dashboard architectures for rapid operational decision-making
- Automating periodic monthly and quarterly management update packages
- Deploying executive sales and receivables dashboards for operational reviews

Day 4: AI-Powered Business and Sales Analytics

- Integrating artificial intelligence workflows with spreadsheet-driven commercial analytics
- Using natural language prompts to detect hidden anomalies and outliers in sales data
- Accelerating account profiling and customer segment classification through generative tools
- Generating AI-assisted sales forecasting models based on historical baseline trends
- Automating narrative management summaries from complex analytical tables
- Validating automated insights against source calculations to ensure factual accuracy

Day 5: Strategic Account Planning and Commercial Execution

- Segmenting customer tiers by profitability, buying velocity, and account margin contribution
- Evaluating pipeline conversion rates, funnel velocity, and opportunity stage leakage
- Isolating growth opportunities and margin risks across established enterprise clients
- Developing strategic account planning roadmaps backed by quantitative balance history
- Translating analytical performance indicators into operational commercial action plans
- Presenting data-supported strategic recommendations to executive leadership

Frequently Asked Questions

What qualifications or prerequisites are required?

Participants should have a foundational working knowledge of Microsoft Excel, including basic navigation, data entry, cell formatting, and fundamental mathematical formulas. Prior familiarity with commercial transactions, invoices, or customer accounts is useful, but no prior background in advanced spreadsheet modelling or artificial intelligence is required.

How long is the course?

The course runs across five consecutive days. Each day involves four to five hours of structured instructional modules, analytical exercises, and practical spreadsheet labs, totalling approximately 20 to 25 training hours.

Can AI-generated insights be used directly in management decisions?

Artificial intelligence outputs should not be used without verification against source data. All automated summaries and forecasts must be reviewed against verified spreadsheet figures and judged within the commercial context of the organization before being submitted to executive leadership.

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Course Value and Distinctions

This programme delivers an end-to-end operational pathway that connects data hygiene, formula-driven modeling, visual KPI reporting, and strategic account planning. Rather than treating spreadsheets, machine intelligence, and commercial management as separate disciplines, the curriculum leads participants through a continuous workflow: from raw transaction data and debt ageing analysis to dashboard reporting, prompt-based pattern identification, and strategic execution.

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Training Course Categories

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- Agribusiness & Food Security Training Courses
- Aviation Management and Operations Training Courses
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- Crisis Management and Business Continuity Training Courses
- Data Analytics Training and Data Science Courses
- Digital Government & Public Service Training Courses
- Education and Learning Development Training Courses
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- Facilities and Real Estate Training Courses
- Finance and Accounting Training Courses
- Governance, Risk and Compliance Training Courses
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- Leadership and Management Training Courses
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- Personal & Self-Development Training Courses

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