TRAINING CATALOGUE

- Understand the role and objectives of the budgeting and KPI reporting processes
- Discover the costs and operations monitoring methods
- Organise and check your database, emphasize key figures with Excel
- Create and analyse budget analysis tables
- Create and analyse financial or operational dashboards

- Design, create and update worksheets with reliable and efficient calculations
- Format your worksheets and prepare them for printing or converting into PDF files
- Discover the IF function and conditional formatting
- Discover the principles and basic functions of a database
- Create simple, powerful charts to illustrate figures

- Create simple and advanced calculation formulas
- Use a database effectively
- Analyse data using advanced functions
- Analyse data using pivot tables
- Choose and create powerful charts

- Develop more complex tables to enable advanced analysis
- Manage data extractions with Power Query
- Use and combine advanced formulas
- Use the advanced features of pivot tables
- Create advanced charts
- Create automated filters to extract data based on flexible criteria

- Use the Text to Column menu to convert or manipulate strings of text in a database
- Use the most common data transformation functions to enable analysis
- Extract data using Power Query
- Combine data from several data tables
- Transform extracted data to allow easier analysis

TRAINING CATALOGUE (CONTINUED)

DASHBOARDS AND BUDGET MONITORING
FOR NON-FINANCIAL PROFESSIONALS (2 DAYS)

Who for: This course is aimed at anyone who is not a financial management specialist and who wants to develop their skills and understanding of the budgeting and reporting process.
Prerequisites: Basic knowledge of Excel or completion of the "Excel Level 1" course.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.

TRAINING OBJECTIVES

- Understand the role and objectives of the budgeting and KPI reporting processes
- Discover the costs and operations monitoring methods
- Organise and check your database, emphasize key figures with Excel
- Create and analyse budget analysis tables
- Create and analyse financial or operational dashboards

TRAINING PROGRAMME (2 days)

UNDERSTANDING THE ROLE OF FINANCIAL MANAGEMENT TOOLS IN THE COMPANY
Role and rationale of the dashboard and budgeting process
Creating your Department's budget
Distinguishing between the different types of indicators
Choosing a set of indicators to analyse business performance

EXTRACTING AND PROCESSING DATA TO PREPARE THE BUDGET OR DASHBOARD
Extracting data from the management system
Using a database effectively with Excel
Using Excel's advanced formulas and functions to analyse data

CREATING AN EFFECTIVE DASHBOARD OR BUDGET ANALYSIS
Using conditional formatting to highlight variances
Creating appropriate pivot tables to analyse your database
Creating clear, powerful charts and tables
Analysing data

EXCEL LEVEL 1 – BEGINNER
(2 DAYS)

Who for: This course is aimed at anyone who wants to master the fundamentals of Excel.
Prerequisites: A basic command of the computer and the Windows environment are required for this course.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.
The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Design, create and update worksheets with reliable and efficient calculations
- Format your worksheets and prepare them for printing or converting into PDF files
- Discover the IF function and conditional formatting
- Discover the principles and basic functions of a database
- Create simple, powerful charts to illustrate figures

TRAINING PROGRAMME

CREATING, FORMATTING A WORKSHEET AND PERFORMING FIRST CALCULATIONS
Principles and methodology of Excel
Creating a basic worksheet
Using fonts, borders and fill
Performing simple calculations

USING BASIC FORMULAS
Using absolute references in calculation formulas
Using mixed references in calculation formulas
Discovering and using common functions to analyse data

USING THE IF FUNCTION AND CONDITIONAL FORMATTING
Discover and use the IF function
Apply conditional formatting to highlight key data

PREPARE THE WORKSHEET FOR PRINTING OR PDF FORMAT
Print a simple worksheet
Format a large worksheet to allow printing
Print a complex or large worksheet into a multi-sheet report (on paper or in PDF)

CREATE A SIMPLE CHART
Principles of Excel charts
Creating and formatting a basic pie chart or histogram

DISCOVER THE FUNCTIONALITIES OF A DATABASE
Principles of a database
Discover and use the Sort and Filter tools

EXCEL LEVEL 2 – INTERMEDIATE
(2 DAYS)

Who for: This course is aimed at anyone wishing to improve their use of Excel, save time and master data processing and analysis functions.
Prerequisites: Having completed the "Excel Level 1" course or having an equivalent level of knowledge.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.
The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Create simple and advanced calculation formulas
- Use a database effectively
- Analyse data using advanced functions
- Analyse data using pivot tables
- Choose and create powerful charts

TRAINING PROGRAMME

CREATING SIMPLE AND ELABORATE CALCULATION FORMULAS
Basic calculation principles in Excel
Using relative (A1), absolute (A1) or mixed ($A1 / A$1) references in a formula
Creating and using named cells or fields in a formula

CREATING AND MANAGING A DATABASE
Principles of a database
Sorting or filtering your data according to specific criteria
Creating and using a drop-down list with data validation
Highlighting key data with conditional formatting

USING ADVANCES FUNCTIONS
Managing a data extraction to enable data processing
Using Text functions
Using Date functions
Retrieving missing data with the VLOOKUP function
Using key statistical functions (SUM, AVERAGE, COUNT, COUNTA, COUNTIF, SUMIF…)

CREATING AND UPDATING PIVOT TABLES
Creating a basic pivot table
Performing calculations in a pivot table (sum, average, %)
Refreshing and editing source data in a pivot table
Adapting the pivot table presentation according to the data to be analysed

CHOOSING AND CREATING CHARTS
Creating a simple and impactful chart (histogram, pie, curve, bars)
Creating a combined chart
Creating a Sparkline chart

EXCEL LEVEL 3 – ADVANCED
(2 DAYS)

Who for: This course is aimed at anyone wishing to master the advanced features of Excel.
Prerequisites: Having completed the "Excel 1" and "Excel 2" courses or having and equivalent level of Excel.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.
The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Develop more complex tables to enable advanced analysis
- Manage data extractions with Power Query
- Use and combine advanced formulas
- Use the advanced features of pivot tables
- Create advanced charts
- Create automated filters to extract data based on flexible criteria

TRAINING PROGRAMME

MANIPULATE AND ANALYSE COMPLEX TABLES USING ADVANCED FUNCTIONS
Use statistical functions with multiple criteria (COUNTIFS, SUMIFS, SUMPROD…, etc.)
Use and combine advanced conditional functions (IF, AND, OR, IFERROR, ISBLANK...)
Discover and use advanced data lookup functions (VLOOKUP, XLOOKUP)
Prepare your database using advanced Text or Date functions
Set up advanced conditional formatting with formulas
Ensure correct data entry using advanced validation criteria and multiple level drop-down lists

USING AND COMBINING ADVANCED FUNCTIONS
Convert extracted data to enable analysis
Discover some basic consolidation functions (3D Sum, Consolidate)
Extract and transform data with Power Query (from an Excel, CSV or PDF file)
Create automated filters to extract data based on flexible criteria

USE THE ADVANCED PIVOT TABLE FEATURES
Review the basic pivot table principles and calculations (sum, average, number)
Integrate advanced calculations into the pivot table (%, cumulative, rank, no. of unique values, etc.)
Perform custom calculations in the pivot table using calculated fields
Create pivot charts

CREATING ADVANCED CHARTS
Discover some less common charts (gauge, sector bars, radars…)
Create a combined chart with a secondary axis
Customise your charts to create an impact
Create a Sparkline chart in just a few clicks

EXCEL LEVEL 3 – DATA EXTRACTIONS AND POWER QUERY (1 DAY)

Who for: This course is aimed at anyone wishing to master the advanced features of Excel.
Prerequisites: Having completed the "Excel 1" and "Excel 2" courses or having and equivalent level of Excel.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.
The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Use the Text to Column menu to convert or manipulate strings of text in a database
- Use the most common data transformation functions to enable analysis
- Extract data using Power Query
- Combine data from several data tables
- Transform extracted data to allow easier analysis

TRAINING PROGRAMME

EXTRACT AND MANIPULATE DATA FROM A BASIC EXTERNAL SOURCE
Use the Text to Column menu to manipulate extracted data
Use Excel functions to analyse your database (Dates, Text, Lookup)
Discover some data consolidation functions (3D Sums, Consolidate)

USE POWER QUERY TO EXTRACT, PROCESS AND MERGE DATA
Use Power Query to extract data from an external source (Excel, CSV, PDF…)
Combine data from several tables
Split or merge columns
Rotate/un-rotate the table columns
Perform conditional or custom calculations on extracted data
Import the extracted and merged data into Excel for analysis

WORD LEVEL 1
(2 DAYS)

Who for: This course is aimed at anyone who wants to master the fundamentals of Word.
Prerequisites: A basic command of the computer and the Windows environment are required for this course.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.
The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Create, format, and print professional standard documents
- Create a structured document using bullet points and tabs
- Insert tables, images and illustrations

TRAINING PROGRAMME

CREATING AND PRESENTING A SIMPLE DOCUMENT
Creating and presenting a simple letter
Using appropriate fonts and formats
Using automatic correction

STRUCTURING A DOCUMENT
Inserting numbering or bullet points and adjusting text positioning
Understanding and using tabs
Creating a structured document using bullets and tabs

LAYING OUT LE DOCUMENT
Inserting dates and page numbers
Preparing a document for printing
Converting a Word document into a PDF

CREATING AND INSERTING ILLUSTRATIONS
Creating a simple table
Resizing and modifying a table
Inserting an image or shape into a document

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WORD LEVEL 2
(2 DAYS)

Who for: This course is designed for anyone who wants to improve their skills in using Word.
Prerequisites: Having completed the "Word Level 1" course or having and equivalent level of Word.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt. The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Create, format and layout a complex document
- Create and manage a long document efficiently
- Create direct mail
- Maximise the use of Word with the team

TRAINING PROGRAMME

CREATE AND LAYOUT OF A COMPLEX DOCUMENT
Creating a structured form
Inserting a complex table into a document
Modifying an illustration, image or shape
Automatically inserting repetitive content

CREATE AND LAYOUT A LONG DOCUMENT
Applying hierarchical styles
Modifying and updating hierarchical styles
Numbering titles
Managing headers and footers
Adding footnotes
Inserting a cover page

CREATING A MAILING OR DIRECT MAIL CAMPAIGN
Creating and managing a recipient database in Word
Creating and managing a recipient database in Excel
Creating a standard letter for direct mail
Printing envelopes for a mailing
Finalising a mailing or direct mail campaign

WORKING WITH MULTIPLE USERS
Using change tracking
Finalising a document

POWERPOINT
(2 DAYS)

Who for: This course is designed for anyone who wants to master the features of PowerPoint to create clear, attractive presentations quickly and effectively.
Prerequisites: A basic command of the computer and the Windows environment are required for this course.
Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.
The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Discover the operating principles of Powerpoint
- Master the various stages in creating a presentation or document
- Create attractive and powerful presentations
- Insert drawings, images, graphic objects and videos
- Create and use transitions and animations wisely for an impactful presentation

TRAINING PROGRAMME

THE POWERPOINT ENVIRONMENT
Operating principles and best practices for using PowerPoint
What is a slide? Which display for what type of document?

CREATING A POSTER WITH SHAPES AND FORMS
Choosing the size, layout and theme of the document
Adding text and illustrations and organising them on the slide
Adjusting the format of text areas and illustrations

CREATING A BASIC SLIDE PRESENTATION
Choosing a layout and creating a short presentation
Applying a theme to the presentation and to a single slide

CREATING A MORE ADVANCED PRESENTATION
Understanding the different display modes
Creating and using slide masks
Inserting a table or bulleted list
Inserting a shape, SmartArt, image or video
Adjusting the format of text areas, illustrations and tables

ANIMATING THE PRESENTATION
Creating transitions and animations
Checking the timing

BEST PRACTICE
Structuring your presentation
Designing powerful slides
Getting ready

FORMATION & CONSEIL

POWERPOINT – BEST PRACTICE
(1 DAY)

Who for: This course is designed for anyone who wants to master the best practices for creating clear, powerful presentations using the PowerPoint tools, paying attention to both the content and the form of the presentation.

Prerequisites: A basic command of the computer and the Windows environment are required for this course.

Assessment: A post-training test is carried out at the end of the course to assess what has been learnt.
The TOSA or PCIE-ICDL certification test is available for this module as an option.

TRAINING OBJECTIVES

- Master the different stages in creating a presentation
- Create a powerful presentation, enhanced with drawings, images and animations
- Prepare your presentation for oral presentation

TRAINING PROGRAMME

STRUCTURING YOUR PRESENTATION - DEFINING YOUR NARRATIVE LINE
Defining the objective of the presentation
Drawing up the outline of the presentation
Determining the structure of the presentation

CREATING A POWERFUL PRESENTATION USING POWERPOINT TOOLS
Creating powerful slides
Taking care with the format of the slides
Focusing on the visual

PREPARING YOUR ORAL PRESENTATION
Using transitions and animations wisely
Keeping the audience's attention
Getting ready

MANAGING YOUR TIME AND PRIORITIES (2 DAYS)

Who for: This course is aimed at anyone who wants to regain control of their time, get organised and better manage their priorities on a daily basis.
Prerequisites: There are no prerequisites for this course.

TRAINING OBJECTIVES

- Optimise your time according to your priorities
- Organise your daily life efficiently
- Anticipate, prioritise and plan your activities
- Analyse your interpersonal time to be more effective with the team

TRAINING PROGRAMME

DIAGNOSIS OF MY TIME MANAGEMENT
What are my main time constraints?
How do I feel about my time management?
What are my sources of inefficiency (my little time devils)?

GETTING ORGANISED AND SETTING PRIORITIES
Analysing my typical time sequence
Discovering Time Management tools
Applying time management methods and tools

MANAGING MY INTERPERSONAL TIME
The impact of others on my time management
My owns little devils and other people
Structuring and optimising my interpersonal time

TERMS & CONDITIONS - ORGANISATION

Who are we?
CR Formation & Conseil is a French training organisation created in 2014 - Qualiopi-certified since 2022.
Our values: Excellence - Dedication - Sustainability

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Address: 48 avenue des fontenelles 78510 Triel sur Seine - France
Company registration : 821841152 – Training Organisation registration number 11 78 8336978

Training methods and resources
CR Formation & Conseil offers training courses focused on the trainee's needs, using interactive and dynamic facilitation techniques.
The technical resources used are as follows:
- Training takes place in a dedicated training room or in a remote classroom
- Training programmes that combine theoretical presentations with numerous practical applications
- Training support documents provided at the end of the course
- Training courses delivered in face-to-face or remote mode

Language: the training modules in this catalogue are available in French or English.

Training course follow-up and evaluation
- Pre-training needs assessment questionnaire
  (possible adjustment of training content to the needs identified)
- Attendance sheets
- Skills review exercises at the end of the course
- Post-training evaluation form

Course date booking
Training course dates are booked directly with the organisation, following email and/or phone exchange(s).
CR Formation & Conseil undertakes to offer training dates that are as close as possible to the needs of the trainees.
The training dates and conditions are then confirmed in a training agreement signed by both parties.

Training premises and conditions
Prior to any training, CR Formation & Conseil will ensure that the training premises are suitable to guarantee high-quality training conditions.

These training premises may be either a training room provided by the client company or training premises subcontracted by CR Formation & Conseil.

CR Formation & Conseil undertakes only to hire premises that meet the requirements and needs of the participants in the training session concerned, in terms of equipment, health and safety, and access for people with disabilities.

In both cases, the internal rules of the training room used will apply. In the absence of internal regulations, CR Formation & Conseil's internal regulations will apply (a copy of the internal regulations is available on request).

Welcoming people with disabilities

We take into account the needs of people with disabilities and will do our utmost to adapt our training methods and resources.

We recommend that you inform us of the nature of your disability and any specific needs prior to enrolment, so that we can find a satisfactory solution.

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