i³BAR
integrated. interactive. intelligence

integrated interactive intelligent

EXCEL MODELS FOR BUSINESS ANALYTICS & REPORTING

Transforming the Way the World Creates Reports

23, 24 & 25 April 2018 (Monday–Wednesday), Concorde Hotel Kuala Lumpur | www.mia.org.my/i3bar

Transforming the Way the World Creates Reports

This three-day intensive programme is presented in partnership with the Institute of Business Analytics focuses on the integrated, interactive & intelligent Excel Models for Business Analytics & Reporting (i³BAR) methodology—a structured best practice approach for spreadsheets. Through intensive hands-on, practical exercises, participants will learn to create impressive, powerful and interactive reports for decision-making that are structured, flexible and reliable and requires no additional software, add-ons or licenses. By relying on simple formulae and automation, i³BAR has been proven in practice by practitioners worldwide to reduce the time needed to carry out routine reporting from hours and days down to minutes. Participants who successfully submit and assimilate programme concepts into their working model will receive an i³BAR Certificate of Competency.

Learning Objectives

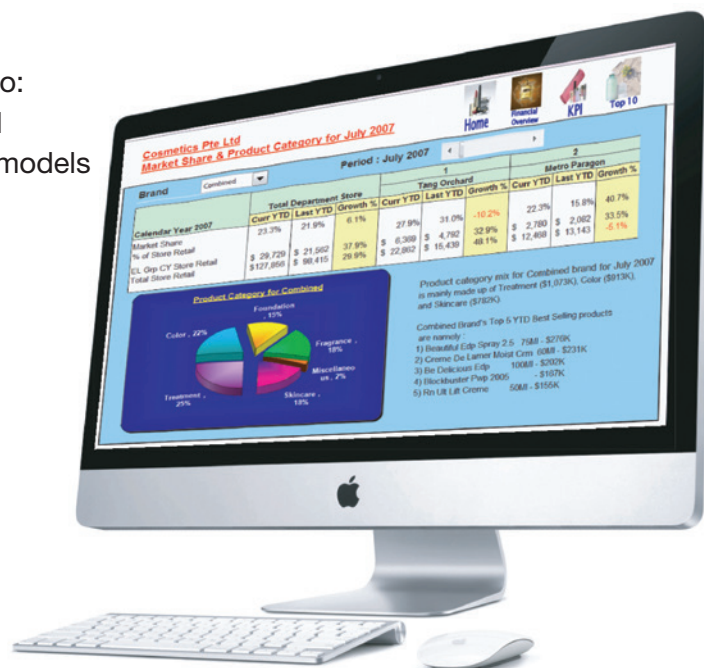At the end of the programme, participants will be able to:
- Integrate data from disparate data sources into Excel
- Build reliable and sustainable excel-based reporting models
- Construct interactive models for decision making
- Create scenarios and what-if analysis for planning & decision making
- Produce visually attractive and impactful reports

Course Outline

DAY 1 Integrate Multiple Data Sources for quick and instantaneous reporting

DAY 2 Interactive Reports for insightful and impressive presentation

DAY 3 Intelligent Models for Simulations to answer What-If questions

Target Audience

CFOs / Finance Directors / Controllers / Accountants, Sales, Marketing, IT, HR and business leaders. Every person who requires a methodology and structure to build interactive Excel models that will provide speed and accuracy in their Reporting and Analysis work.

Learning Method

Classroom Instructor-led with intensive computer hands-on exercises of over 50 challenging case studies and tasks to be discussed, thought through and resolved based on one comprehensive real-life case study.

Reinforcing the Learning

In addition to the 3-day hands-on training, Institute of Business Analytics (IBA) reinforces success through a comprehensive learning support system.

Active Community of Practice

i³BAR alumni can tap into the network for additional support in Excel modelling. You will also be invited to networking, sharing and learning sessions for continuous personal development.

Post Course Project Work

You can opt to submit a project work after the programme, to build interactive Excel Models that meet your current business needs. You will receive guidance in applying the newly acquired i³BAR concepts into your project work which is to be submitted 4 weeks after the programme.

Certification of Competency ("CoC")

A CoC is awarded to all participants who successfully submit and incorporate i³BAR concepts in building a working model. This internationally recognised certificate is valued by employers as it confirms the participant's ability to solve business reporting needs.

Detailed i³BAR Course Outline

This is a 3-day intensive hands-on Certification programme in 3 modules. There will be pre-learning materials for you to achieve proficiency in utilising 8 commonly used Excel functions. i³BAR emphasises on creative combination of these functions for amazing results—no programming, macros or complicated formulas required.

Module 1: Integrate Multiple Data Sources
1. Database Design Do's and Don'ts
2. Key components to an integrated model
3. Power of the 3-Block concept
4. Golden rules to structure sustainable database

Module 2: Build and Present Interactive Reports
1. Bad practices that hinder report interactivity
2. Simplify reporting process for speed and accuracy
3. Secrets to building interactive segmental reports
4. Interactive commentaries that auto reflect changes made in data

Module 3: Models to Simulate What-If Scenarios
1. Design of input templates incorporating data validation and protection
2. Best practices to building planning models
3. Simulate varying cost behaviours and trends
4. Instantaneous what-if simulations

Top 7 reasons why people recommend i³BAR

1. 90% file size reduction

"I was already using Excel extensively before the course and my biggest file was 30MB. During the course, I was skeptical as everything seemed so simple, but the thinking behind this course is amazing! I was convinced that I can achieve equal if not more powerful results with simple functions. Now that same file is only 3MB, faster, nicer and the management loves it."

David Miller, Head of Business IT

2. 100% data integrity

"We are now regarded as the authority when it comes to numbers."

Johnny Teo, Finance Manager

3. Interactive reporting with drill down capability

"Instead of giving management tonnes of numbers & tables to read previously, the interactive charts and visuals make report reading a joy than a chore. Management is able to obtain prior months/quarters figures with a click of a button, without having to refer back to old copies of management reports."

Phyllis Chin, FP&A

4. Millions of dollars saved

"We had big plans that required a big system, until we attended this course, all these are now made possible. It is no longer just a dream! And it does not cost millions of dollars to invest in sophisticated systems. Besides the knowledge & concepts, we also learned some soft skills around being creative & flexible in our design, and always start with an end in mind. The knowledge gained is definitely very invaluable!"

Victor Evans, FD, Healthcare

5. Visually engaging presentation

"My model has created a lot of buzz in the board meetings as they have never seen something like this before."

Claire Richardson, CFO

6. Simplicity!

"It took me about a month to build the ideal model for my company—a fully interactive model by using simple excel functions. The sustainability is amazing as the model can be used in future years with very simple updates required and best of all, I'm having my team update the model easily while I free myself to concentrate on other business critical matters."

Kate Davis, Management Accountant

7. Dedicated Course Trainers

"The course is fast-paced and all my classmates seem to be well-versed in Excel but I did not face any peer pressure. Elaine & team are truly dedicated; rarely do I come across trainers that are so passionate and willing to help an individual. Their vast experience and sharing during class made it easy for me to relate to work and helped my understanding."

Kelly Yu, Treasury

The Institute of Business Analytics (IBA) comprises an international team of highly qualified professionals from diverse industries who train and consult organisations in transforming the way the world creates reports. The team brings extensive management experience from the financial, commercial, education, government, military and non-profit sectors. Our collective experience is extensive and has encompassed auditing, financial analysis, management reporting and enterprise system implementation.

The team is a group of passionate professionals who share in the same belief in using technology to create better work life balance. IBA trainers apply Adult Learning Methodology to inspire participants worldwide to make dramatic improvements that optimise their performance in the workplace.

Elaine Chong
MBA, CA

Elaine Chong is an international speaker, public and corporate trainer on business analytics and best practice reporting using Excel. She is also the developer and master trainer of the world renowned courses like i³BAR and Visual Analytics now offered in 11 countries.

Elaine has extensive experience in auditing, financial analysis, management reporting and enterprise systems implementation. She has achieved several global awards for management reporting accuracy, timeliness and presentation. Her passion for this topic has inspired many of her students to make dramatic improvements that optimise their performance in the workplace.

May Wong

May Wong's work experience spans over 17 years with extensive experience in implementation systems and designs in accounting, reporting and consolidation as well as data migration. She has worked for various multi-national companies, including extensive overseas exposures.

She is currently a Member of the Malaysian Institute of Accountants (MIA), a Fellow member of the Chartered Association of Certified Accountants (ACCA) and provisional member of Institute of Singapore Chartered Accountants (ISCA).

AUSTRALIA ▪ CANADA ▪ ENGLAND ▪ HONG KONG ▪ MALAYSIA ▪ NETHERLANDS ▪ SCOTLAND ▪ SINGAPORE ▪ SOUTH AFRICA ▪ USA

INTEGRATED, INTERACTIVE & INTELLIGENT EXCEL MODELS FOR BUSINESS ANALYTICS AND REPORTING (i³BAR)

PARTICIPANTS' DETAILS

Participant 1   Full name as per I/C (Dato' / Datin / Dr / Mr / Mrs / Ms): ☐ Vegetarian Meal

Membership No.:

Designation: Email:

*☐ Member   *☐ Non-member   *☐ Sponsored Staff¹

(Sponsoring MIA member's name & membership no.)

Participant 2   Full name as per I/C (Dato' / Datin / Dr / Mr / Mrs / Ms): ☐ Vegetarian Meal

Membership No.:

Designation: Email:

*☐ Member   *☐ Non-member   *☐ Sponsored Staff¹

(Sponsoring MIA member's name & membership no.)

Participant 3   Full name as per I/C (Dato' / Datin / Dr / Mr / Mrs / Ms): ☐ Vegetarian Meal

Membership No.:

Designation: Email:

*☐ Member   *☐ Non-member   *☐ Sponsored Staff¹

(Sponsoring MIA member's name & membership no.)

ORGANISATION'S DETAILS

Organisation:

Industry: Contact Person:

Address:

Email: Tel: Fax:

GST ID No.:

(Applicable for Companies/Individuals registered
with the Royal Malaysian Customs Department)   Signature & Company Stamp:

PAYMENT DETAILS

Payment by Cheque

Bank & Cheque No.: Amount RM:

Payment by Credit Card   ☐ Visa   ☐ Master

Cardholder's Name:

Card No.: Expiry Date:

I Authorise Payment of RM:

Cardholder's Signature: Date:

Our programmes can be customised to meet your in-house training requirements. Please call for details.

GROUP REGISTRATION
Enjoy additional 15% group discount for three(3) registrations from the same company

PROGRAMME FEES

Member (MIA/ACCA)	RM4,452
Member Firm's Staff or Sponsored Staff ¹	RM4,770
Non-member	RM5,088

The above programme fee is inclusive of 6% GST.

PROGRAMME PACKAGE INCLUDES
- Comprehensive step-by-step Business Analytics and Reporting Manual
- One (1) hour technical assistance to assist adoption of skills in workplace
- Project Assessment and Certification
- Certificate of Competency upon successful completion of project work

PROGRAMME DATE AND VENUE
23, 24 & 25 April 2018 (Monday–Wednesday), Concorde Hotel Kuala Lumpur

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            Avenue 3, Bangsar South City
            No. 8, Jalan Kerinchi
            59200 Kuala Lumpur

Website : www.mia.org.my/i3bar

GST No. : 000955203584

Participants are required to bring their own laptop installed with Microsoft Excel 2007/ 2010/ 2013

IMPORTANT NOTES:
Registration is on a first-come-first-served basis.
Only fully completed registration form will be processed.

TERMS & CONDITIONS

PROGRAMME FEE
- Fee is payable to **MALAYSIAN INSTITUTE OF ACCOUNTANTS**
- Fee includes course materials, lunch and 2 tea breaks per day.
- Full payment of the above amount shall be made within thirty (30) days from the date of the Payment Advice or on the day of the event, whichever earlier.
- Admittance may be denied upon failure to make full payment as per the above requirement.

CANCELLATION/TRANSFER
Upon registering, participant(s) are considered successfully enrolled in the event. Should participant(s) decide to cancel/transfer their enrolment, a cancellation/transfer policy shall be applied as follows.
a. Written cancellation/transfer received less than seven (7) days from the date of the event:
   - A refund (less administrative charge of 20%) will be made
   - Unpaid registrations will also be liable for 20% administrative charges
b. Written cancellation/no show on the day of the programme:
   - No refund will be entertained
   - Unpaid registrations will also be liable for full payment of the registration fee
   - Partial cancellation is not allowed
You can substitute an alternate participant if you wish to avoid cancellation/transfer charges. Any difference in fees will be charged accordingly.

*Please select the participant classification carefully as it determines the fee payable. No alteration will be allowed after the registration is accepted. Terms and conditions apply.
¹The Sponsored Staff must report directly to the sponsoring MIA member in his/her firm or company.

CERTIFICATE OF ATTENDANCE AND CPE HOURS
- Upon full attendance of the programme, participants will be issued an "E-certificate". Participants will receive an email with a download link and are required to download the e-certificate within 30 days. For this purpose, it is **COMPULSORY** to fill in the email address clearly.
- For MIA members, the CPE hours will be credited into the Membership System within 2 weeks of the event.
- Participants will only be entitled to the CPE credit hours upon attending the entire duration of the programme. **CPE credit hours will not be accorded for partial attendance**.

DATA PROTECTION
Personal Data is gathered in accordance with the Personal Data Protection Act 2010 (Act 709).

DISCLAIMER
Malaysian Institute of Accountants (MIA) reserves the right to change the speaker(s), date(s) and to cancel the programme should circumstances beyond its control arises. MIA also reserves the right to make alternative arrangements without prior notice should it be necessary to do so. Upon signing the registration form, you are deemed to have read and accepted the terms and conditions.