
Spreadsheet Model Design for Finance Leaders Training Course: Structure, Controls and Dashboards

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Sharm El-Sheikh





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Programme Summary

Spreadsheet model design is the subject of this five-day training course for finance managers, financial controllers, planning leads and heads of reporting, ending in a reporting model blueprint for one management pack. Excel models often grow sheet by sheet without a clear structure, so errors hide in formulas and reports lose the trust of the board. The approach moves from model structure and layout, through formula and data controls, to review and testing, then to dashboards and a worked blueprint. Mars Training Centre UK delivers this programme in spreadsheet model design.

The Business Case

When models mix inputs, calculations and outputs, a single hidden error can reach a board paper unnoticed. Leaders who insist on clear structure, controlled data, independent review and consistent reporting packs reduce the risk of misstatement and shorten each reporting cycle.

- Reporting Errors: Fall as inputs, calculations and outputs are separated and checked.
- Close Cycle Time: Shortens as standard layouts replace rebuilt workbooks each period.
- Key Person Dependency: Reduces as models are documented and reviewed by someone other than the builder.

Principles and Evidence Base

- FAST Standard: This modelling standard sets out rules for flexible, appropriate, structured and transparent models, and guides the structure work in Sessions 1 and 2.
- Separation of inputs, calculations and outputs: This layout principle organises the model design in Session 1 and the dashboards in Session 4.
- Independent model review: Review by a second person, using checks and testing, underpins the control work in Sessions 2 and 3.

Intended Participants

- Finance managers who own the monthly reporting pack and the workbooks behind it.
- Financial controllers who sign off numbers produced in Excel.
- Planning and budgeting leads who maintain forecasting models.
- Heads of reporting who set standards for analysts and report builders.

The programme serves banks, industrial groups, public bodies and service companies.



Learning Outcomes

1. Participants will be able to design a model layout that separates inputs, calculations and outputs.
2. Participants will be able to apply formula rules that keep calculations consistent and traceable.
3. Participants will be able to construct data and input controls that prevent invalid entries.
4. Participants will be able to evaluate a model for errors using structured review and testing methods.
5. Participants will be able to prioritise measures and layouts for dashboards and reporting packs.
6. Participants will be able to justify a reporting model blueprint to a finance director and an audit lead.

Programme Structure

Day 1: Model Structure and Layout

How should a spreadsheet model be organised so others can follow it?

- Input, Calculation and Output Layout Map
- Sheet and Naming Conventions
- Timeline and Consistent Column Design
- Assumptions Register
- Review of Two Poorly Built Workbooks

Day 2: Formula Rules and Data Controls

Which formula and data rules keep a model reliable as it grows?

- Formula Consistency Rules
- Input Validation and Data Entry Controls
- Lookup and Summary Function Choices
- Check Cells and Reconciliation Totals
- Excel Version and Change Log

Day 3: Review, Testing and Risk

How is a model checked before its numbers reach decision makers?

- Model Review Checklist
- Error Trace and Stress Test Exercise
- Scenario and Sensitivity Controls
- Model Risk Rating Table
- Sign-off and Handover Rules

Day 4: Dashboards and Reporting Packs

How are results presented so managers can act on them?



- Measure Selection for Management Reporting
- Pivot Table and Summary Layouts
- Dashboard Chart Selection Guide
- Variance Commentary Format
- Reporting Pack Template

Day 5: Applying Spreadsheet Model Design to One Management Pack

Is the blueprint ready for the finance director and audit lead to approve?

- Applying the Session 1 Layout Map to the Chosen Pack
- Testing the Session 2 Rules Against Sample Formulas
- Checking Session 3 Risk Ratings Against Open Issues
- Applying the Session 4 Template to Current Reporting
- Completing the Reporting Model Blueprint

Methodology

The programme is built around structured exercises and case analysis. Participants work with anonymised sample workbooks, find and correct errors, redesign layouts and draft dashboards in small teams, then defend their blueprint before a simulated finance review panel. No macro programming is required.

- Suggested activity: Tracing and correcting planted errors in a sample forecast workbook.
- Suggested activity: Redesigning a single-sheet model into separated inputs, calculations and outputs.
- Suggested activity: Drafting a one-page dashboard from a sample monthly dataset.

Capstone Output

Each participant completes a reporting model blueprint for one management pack. It contains a layout map, naming and formula rules, an input control list, a review checklist, a dashboard design and a handover note. It is used to brief the finance director and audit lead and to rebuild or repair the live workbook.

Frequently Asked Questions

Is spreadsheet model design suitable for managers who are not Excel experts?

Yes. Spreadsheet model design is set at managerial level and assumes responsibility for reports and models, not advanced formula or macro skills.

Which standard does spreadsheet model design rest on in this course?

Spreadsheet model design rests on the FAST Standard for model structure, together with the separation of inputs, calculations and outputs and independent model review.



How is the blueprint from spreadsheet model design used at work?

You use the blueprint from spreadsheet model design to rebuild or repair a live workbook, brief your finance director and set review rules.

How does spreadsheet model design differ from an Excel functions course?

Spreadsheet model design centres on structure, controls, review and reporting decisions, while an Excel functions course centres on individual commands and features.