

AKSESHEN LLC
Do Meaningful Work

TRAINING PROGRAMS

TRAINING - FOCUS

Our training curriculum is fluid, focuses only on the most common needs of Financial Professionals.

By assessing the user, our training moves forward from their level of understanding, giving them benefits & new options for analytics.

We do the work in finding study cases that are comprehensive and understandable.

Data Analytics Training Focused on Finance Professional Skills

Problem:

While you know there is a better way, finding a tutorial to assist you takes time to find and understand.

- Time involved to find, watch and absorb a tutorial online can be excessive
- Finding a relevant example that uses your variables is nearly impossible.
- If tutorial on topic is found but in executing there is an error, who do you go to for help.

Solution:

Our training is paced to be unobtrusive to work activities that must be done and allows you to focus on skill sets that will be immediately transferrable to your day-to-day activities

- Short class times focusing on a specific activity to be learned
- Repetition for retention
- Training builds on each session with real world examples from beginning to end.
- Training can be run using trainee as helper as teaching reinforcement.
- Materials presented well ahead of time for personnel review when time permits (but not necessary).
- Recorded classes made available to personnel who miss the session

TRAINING - ASSESSMENT

We start with our skills assessment questionnaire to get an understanding of the target group's skillsets being used during the regular course of their daily activities. Then, we look to match these skills to our training curriculum.

We have created training modules for MS Excel and MS Power Query that focus on the key enhancement of skill used daily by employees to create efficiency in their workload

Two step process, enhance Excel familiarity then introduce true data analytics by using Power Query to transform daily data into needed results and really bring the power of Data Analytics home.

Better Match Course Levels with Skill Set Learning Path

Desired Data Analytics Skills by Position

Color saturation indicates where competencies most valuable



Technical skills	Staff	Senior	Manager	Sr Manager	Partner
Technological acumen	Dark Blue	Dark Blue	Medium Blue	Light Blue	Lightest Blue
Data mining and extraction	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Identifying key data trends	Lightest Blue	Medium Blue	Dark Blue	Dark Blue	Dark Blue
Operational analysis	Lightest Blue	Light Blue	Medium Blue	Dark Blue	Dark Blue
Statistical modeling and data analysis	Lightest Blue	Light Blue	Dark Blue	Dark Blue	Medium Blue

Non-technical skills	Staff	Senior	Manager	Sr Manager	Partner
Decision analysis	Lightest Blue	Light Blue	Medium Blue	Dark Blue	Dark Blue
Process improvement	Dark Blue	Dark Blue	Dark Blue	Lightest Blue	Lightest Blue
Strategic thinking and execution	Lightest Blue	Light Blue	Medium Blue	Dark Blue	Dark Blue
Adaptability to change	Dark Blue	Dark Blue	Dark Blue	Medium Blue	Medium Blue
Communication skills	Light Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue

TRAINING PROGRAMS – OUR APPROACH TO LEARNING



Premise - Move solidly into a Data Analytical (DA) based skillset but provide support to current tools and business practices by:

- ***Establishing true DA analytics with the right tools to drive efficiency***
- ***Working from simple to more complex examples***

Learning Process:

- **Create a cohesive end-to-end learning path & a logical progression of skills from **Excel to Power Query to Power Pivot to Power BI****
- **Link learning progression toward business analytics needs and creating efficient skillsets**
 - **Tie into specific business processes such as Month end reporting and use examples from real identified processes – connect tasks to achieved solutions**
- **Design sessions are interactive to enable participants to connect to everyday situations:**
 - **Send materials ahead of time**
 - **Identify a specific attending member to be the “driver” of the session for the day, that person will perform the steps as the Aksheshen trainer coaches**
 - **Record session and post to Client designated share site for participant reference and to encourage self learning**
 - **Provide continuing support for one-on-one tutorials (understanding that class topic might be revisited down the road at an engagement point)**

TRAINING: OUR PLAN BREAKDOWN

We inventoried and aligned a curriculum based on MS tools from easiest to most complex to provide logical education flow for the toolset.

- Starting with medium complexity and peppering in easy skills throughout the remaining curriculum
- Broke down topically into digestible pieces to foster retention
- Developed specific databases from which to build living examples

Excel based Training Flow – Work toward using the more advanced features of Excel:

- **Easy to Hard Skill flow**
- **Focused on needed financial analytics and elimination of traditional pinch-points, which are identified & highlighted**
- **Bridges to Power Query (the better way) are called out and referenced**

Location Ribbon or Function	Sub-Location Ribbon or Function	Skill	Description	Initial Training	# of Sessions	Order of training in sessions	Easy/ Medium/ Hard	Additional Training	Spreadsheet Example to Use	Tr
EXCEL			GOLDEN RULE	A	1	1.00				Ex th A.
EXCEL			PROPER DATA SET	A	1	1.00				
EXCEL			RIBBON - GENERAL	A	1	1.00				
HOME RIBBON	CLIPBOARD	Paste	Button with Drop-Down. The button will paste the current contents from the clipboard. The drop-down contains the commands: Paste , Formulas (removed in 2010), Paste Values, No Borders, Transpose, Paste Link, Refreshable Web Query, Use Text Import Wizard, Paste Special and Paste as Hyperlink. The As Picture extension includes: Copy as Picture, Paste as Picture and Paste Picture Link. Exactly which commands are enabled will	B	1	2.00	Medium			In
HOME RIBBON	Number	Number Format	Provides a list of all the available number formats. The built-in number formats are: General, Number, Currency, Accounting, Short Date, Long Date, Time, Percentage, Fraction, Scientific and Text. (Ctrl + Shift + %). Applies the percent number format to the current selection.	B	1	2.10	Medium			
HOME RIBBON	Number	Percent Style	(Ctrl + Shift + %). Applies the percent number format to the current selection.	B	1	2.30	Medium			
HOME RIBBON	Number	Accounting Number Format	Button with Drop-Down. The button applies your 'default' accounting number format to the current selection. The drop-down contains the commands: English (UK), English (US), Euro and More Accounting Formats.	B	1	2.40	Medium			
HOME RIBBON	Number	Increase Decimal	Adds one decimal place to the current selection.	B	1	2.50	Medium			
HOME RIBBON	Number	Decrease Decimal	Removes one decimal place from the current selection.	B	1	2.60	Medium			
HOME RIBBON	Number	Comma Style	Applies the comma style number format to the current selection.	B	1	2.70	Medium			
HOME RIBBON	Styles	Conditional Formatting	Drop-Down. Provides access to conditional formatting commands which can be used to apply cell formatting automatically. The drop-down contains the commands: Highlight Cells Rules, Top/Bottom Rules, Data Bars, Color Scales, Icon Sets, New Rule.	B	2	2.80	Medium			
HOME RIBBON	Styles	Format as Table	Drop-Down. This applies a Table Style to the current selection and defines it as a table. The drop-down contains the commands: Light, Medium, Dark, New Table Style and New PivotTable Style. The New Table Style displays the "New Table Style" dialog box. The New PivotTableStyle displays the "New PivotTable Style"	B	2	2.90	Medium			
HOME RIBBON	Editing	Sort & Filter	Drop-Down. Sorts the currently selected data or current region into ascending or descending order and lets you add filters to reduce the number of visible rows. The drop-down contains the commands: Sort A to Z, Sort Z to A, Custom Sort, Filter, Clear and	B	3	3.00	Medium			

TRAINING PROGRAMS – EXAMPLE LEARNING SCHEDULE



Power Query/Power Pivot	Sample Date	1/10/2020	1/24/2020	2/7/2020	2/21/2020	3/6/2020	3/20/2020	4/3/2020	4/17/2020	5/1/2020	5/15/2020	5/29/2020	6/12/2020	6/26/2020	7/10/2020	7/24/2020	8/7/2020	8/21/2020	9/4/2020	9/18/2020	10/2/2020	10/16/2020	10/30/2020	11/13/2020	11/27/2020	12/11/2020	12/25/2020
	Sample Day	Fri	Fri	Fri	Fri	Fri	Fri	Fri	Fri	Fri	Fri	Thur	Thur	Thur	Thur	Thur	Thur	Thur	Thur	Fri	Fri	Fri	Fri	Fri	Fri	Fri	
8:30-9:30 AM	Session	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	
Initial Basics, Get Data, General View of Screens	1	X																									
Choosing Columns , Rows	2		X																								
Data Type, Data, Split & Merge Columns	3			X																							
Group By	4				X																						
Format, Fill, Replace Values	5					X																					
Custom & Conditional Column	6						X																				
Index & Column from Examples	7							X																			
Query Groups Navigation	8								X																		
Real Example using all above skills	9									X																	
Merge Queries	10										X																
Append Queries	11											X															
Reverse & Count Rows	12												X														
Transpose/Using Transpose in report	13													X													
Pivot/UnPivot Columns, Convert to List	14														X												
Rounding, Remove Errors, Copy Entire Table	15															X											
Real Example for adding new data to an existing PQ report	16																X										
Data Model	17																	X									
Basics of Pivot, Proper Data Set/Layout/Slicers/Formatting	18																		X								
Power Pivot/Data Model	19																			X							
Power Pivot - Multiple Imports, Transforms	20																				X						
Power Pivot - Relationships, DAX, Navigation in Data Model	21																					X					
Power Pivot - Report Layout, Calcs, Headers, Totals	22																						X				
Custom Functions	23																							X			
Change Source/Chg Source Current Workbook	24																								X		
PQ Tricks and MCode	25																									X	

- **Focused curriculum**
- **Steps from Simple to more complex**
- **Schedules determined in advance and are flexible for unforeseen circumstances**
- **Attendance tracked and 180 feedback sessions scheduled periodically**

TRAINING PROGRAMS – THE TOOLS WE USE



We use easy to follow step-by-step tutorials that we can custom develop to meet a specific business scenario that we want to reinforce. Example below is a page showing how to create calendar tables for Power Pivot capabilities in MS Excel.

Continuing:

- Reopen the Data Model window. 1
- Ribbon Menu, Date Table drop down box. 2
 - Select 'New'.
- Set Date Range: 3
 - Start Date: 1/1/2019
 - End Date: 12//31/2020

The image shows a sequence of three screenshots from Microsoft Excel illustrating the steps to create a calendar table in Power Pivot:


- Step 1:** The Excel ribbon is shown with the 'Data' tab selected. The 'Manage Data Model' button in the 'Data Tools' group is highlighted with a red box and a circled '1'.
- Step 2:** The 'Date Table' dropdown menu is open, and the 'New' option is selected. A red box and a circled '2' highlight this selection.
- Step 3:** The 'Date Table Range' dialog box is shown. The 'Start Date' is set to 1/1/2019 and the 'End Date' is set to 12/31/2020. Both date inputs are highlighted with red boxes, and a circled '3' is next to the dialog box.

TRAINING PROGRAMS – THE WAY WE ASSESS & TRACK



Individual participant skills checklist that enables tracking of skills learned and provides a personal record of course participation – One for each discipline (Excel; Power Query; Pivot Tables, etc.)




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EXCEL ASSESSMENT/CHECKLIST*

* Check all that apply - Skills you are familiar with

HOME RIBBON		FUNCTION LIBRARY LOOKUP & REFERENCE	
CLIPBOARD Paste	<input checked="" type="checkbox"/>	Row / Column / Area Information AREAS	<input checked="" type="checkbox"/>
Number	<input checked="" type="checkbox"/>	Data Lookup Functions – CHOOSE	<input type="checkbox"/>
Styles Conditional Formatting	<input type="checkbox"/>	Row / Column	<input type="checkbox"/>
Styles Format as Table	<input type="checkbox"/>	Data Lookup Functions – VLOOKUP	<input type="checkbox"/>
Editing Sort & Filter	<input type="checkbox"/>	Functions To Return References to Cell Ranges	<input type="checkbox"/>
	<input type="checkbox"/>	HYPERLINK	<input checked="" type="checkbox"/>
Editing Find & Select	<input type="checkbox"/>	Functions To Return References to Cell Ranges	<input type="checkbox"/>
		INDEX	<input type="checkbox"/>
INSERT RIBBON		Data Lookup Functions MATCH	<input type="checkbox"/>
Charts Recommended Charts	<input checked="" type="checkbox"/>	Functions To Return References to Cell Ranges	<input type="checkbox"/>
		OFFSET	<input type="checkbox"/>
Charts PivotChart	<input type="checkbox"/>	Functions To Return References to Cell Ranges	<input type="checkbox"/>
		INDIRECT	<input type="checkbox"/>

TRAINING: OUR PARTICIPATION BREAKDOWN

We provide result analytics for participation that can be reviewed to understand team commitments and see outside indicators (such as busy periods) that can be understood for subsequent session scheduling to foster engagement and participation.

Measurement of Results and Participation Tracking

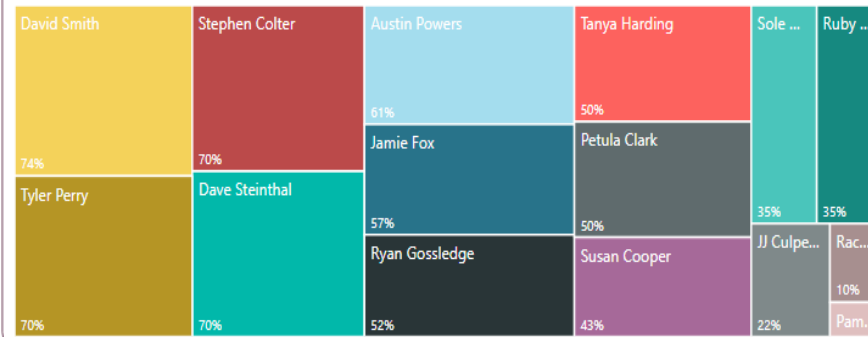
2020 Power Query Training Recap



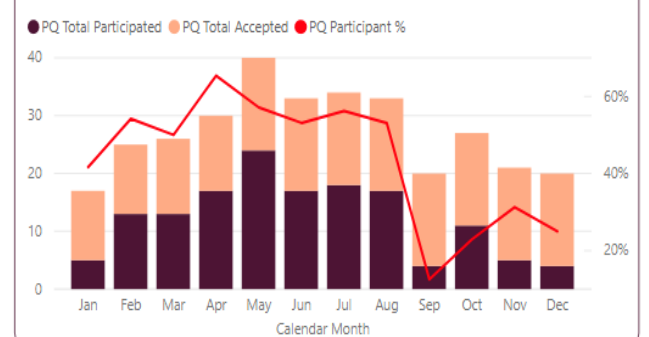
Participation Summary

19	16	3	338	148	44%
PQ Total Invited	PQ Total Accepted	PQ Total Declined	PQ Available Sessions	PQ Total Participated	PQ Participant %

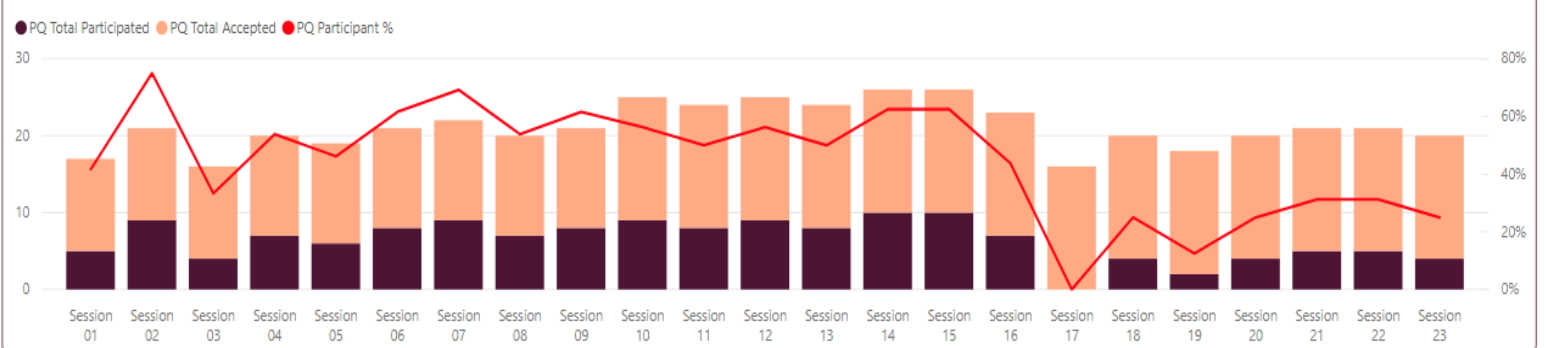
Participant % by Full Name



Total Participated by Calendar Month



Total Participated by Session Number





TRAINING PROGRAMS – THE WAY WE COLLABORATE

Ensuring that our curriculum accomplishes the objectives of training at your company and results in a positive experience for participants as they apply true Business (Data) Analytics and gain job process efficiencies:

- ***Company buy-in on specific curriculum focus and path:***
 - Course flow, class process, support materials.
 - Storage of materials on Company share site.
- ***Company & Akseshen alignment on:***
 - Frequency of Sessions & Implementation dates:
 - Participation lists – Assessments conducted.
 - Focus areas to tailor training topics and content determination (e.g., the real-life examples of currently existing processes or pinch-points in day-to-day activities to target and solve for with DA training).



THE AKSESHEN SOLUTION – LET’S CHAT



Let’s discuss your most critical needs. Our assessment process provide you with a top line view of your data readiness

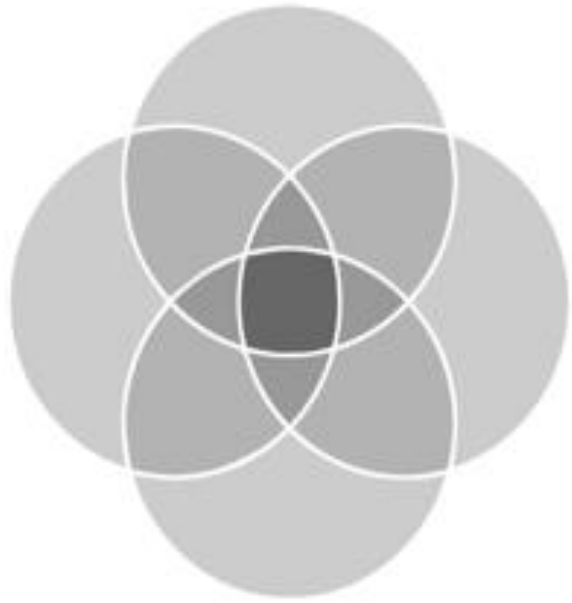
Your business results are *your* top priority – your organization will be *our* top priority.

Visit our website to learn more: www.akseshen.com

Contact us:

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AKSESHEN LLC
Do Meaningful Work

APPENDICES

TEAM BIOS
RESOURCES

THE TEAM



Ownership

Partner & Business Solutions Director



Todd Arnold-Simons leads Akseshen's efforts to design, implement and enhance client analytical and reporting capabilities. He is knowledgeable in business intelligence execution, data sources and structures. He focuses on understanding business needs to ensure the correct outcomes and delivers expanded capabilities in the most simplistic-to-use formats for our clients. He brings 15+ years of analytics and reporting experience to Akseshen.

www.linkedin.com/in/toddarnoldsimons

THE TEAM



Business Analytics Manager



Lucy Jasinski is the Business Analytics Manager for Akseshen. She is versatile and resourceful in critical analysis and efficient problem solving. Lucy is a reporting expert that thinks systematically to devise innovative solutions while using her extensive understanding of business processes to provide simplified outcomes. Her background of 15+ years in data analysis, reporting and facilitating technical connections enables her to design processes, tools and approaches that help firms achieve desired outcomes and success.

<https://www.linkedin.com/in/lucyjasinski/>

THE TEAM



Goldstone Systems



GSS has extensive experience in organizational implementations of Power BI Solutions. We plan, design and build strategic solutions for various business users leveraging our expertise in Data & Analytics. We enable organizations to access actionable insights that result in positive business impacts. We quickly adopt and implement Power BI solutions to empower organizations with an exceptional automated digital experience.