

How You Use Excel in Banking

- **This Tutorial:** A quick Excel tip that takes <10 minutes to set up and will save you hours each week
- It's a **follow-up** to the previous tutorial on optimizing PowerPoint shortcuts, and the idea is the same
- **PROBLEM:** Many Excel shortcuts you use all the time in pitch books, case studies, stock pitch presentations, etc. are **difficult to access**

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- **EXAMPLE:** It's surprisingly annoying to **color code** a set of cells with the built-in shortcuts:

Subscription Revenue:	Units:	Historical			Projected				
		FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19

- **To fix this:**
 - **Alt, H, H** to change the Fill Color
 - **Alt, H, F, C** to change the Font Color
 - **Alt, H, B, M** to access the Borders menu

Subscription Revenue:	Units:	Historical			Projected				
		FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19

The Truth About Excel in Finance...

- You may *think* you're going to use Excel for complex formulas and models all the time... **NOPE!**
- You spend a ton of time on **formatting and sorting data**, which is where the most annoying “shortcuts” are
- But there are also fewer annoying shortcuts than in PowerPoint, and you use a wider variety of shortcuts

Solution: The Quick Access Toolbar

- 1) Criteria:** VERY common shortcut, somewhat long, no existing Ctrl + shortcut, and the mouse isn't easier
- 2) Order:** Use the 1-4 positions for the *most* frequently used commands; 5-9 and 01-09 for less common ones
- 3) Import/Export:** You can import/export your customized QAT as well... but Excel versions must match!
 - If your firm doesn't allow this, take a few minutes to customize your QAT in your Excel installation

Our View – the Most Common Shortcuts

- How Our **QAT** is Set Up:

- Font Color
- Font Size
- Fill Color
- Center Alignment
- Borders
- AutoFit Column Width
- Column Width
- Increase Decimal
- Decrease Decimal

Customize Quick Access Toolbar: ⓘ

For all documents (default) ▼

	Font Color	▶
	Font Size	I ▼
	Fill Color	▶
	Center	
	Borders	▶
	AutoFit Column Width	
	Column Width...	
	Increase Decimal	
	Decrease Decimal	

Solution: The Quick Access Toolbar

- **How to Set This Up:** *Easiest* is to download the exported QAT we created (Click “Show More” and then scroll to the bottom under “Resources”)
- **Then:** Options (Alt, T, O), Quick Access Toolbar, and then Import/Export under Customizations
- **If That Doesn't Work:** Set it up yourself! Go to Options, Quick Access Toolbar, display “All Commands,” and add them manually

The End Result: QAT Magic

- **Now:** Look at how much faster shortcuts are to enter:
 - **Font Color:** Alt, H, F, C → Alt, 1
 - **Font Size:** Alt, H, F, S → Alt, 2
 - **Fill Color:** Alt, H, H → Alt, 3
 - **Center:** Alt, H, A, C → Alt, 4
 - **Borders:** Alt, H, B → Alt, 5
 - **AutoFit Column Width:** Alt, H, O, I → Alt, 6
 - **Column Width:** Alt, H, O, W → Alt, 7

The End Result: QAT Magic

- **Time Required:** This takes ~1 minute, or maybe up to 10 minutes, to set up, and will save you hours of time
- **Example:** Let's say you get a messy, poorly formatted Excel file from an intern or, even worse, a **former consultant**

Poorly Formatted Excel File:

Subscription Revenue:	Units:	Historical			Projected				
		FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19
Total Domestic Streaming Revenues:	\$ M	\$ 2,184.868	\$ 2,751.375	\$ 3,431.434	\$ 4,079.305	\$ 4,725.416	\$ 5,387.905	\$ 6,063.044	\$ 6,792.879
Revenue Growth Rate:	%	N/A	25.9%	24.7%	18.9%	15.8%	14.0%	12.5%	12.0%

- **Fixed Version:** Here's what it should look like after you undo all the damage caused by interns/consultants:

Subscription Revenue:	Units:	Historical			Projected				
		FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19
Total Domestic Streaming Revenues:	\$ M	\$ 2,184.9	\$ 2,751.4	\$ 3,431.4	\$ 4,079.3	\$ 4,725.4	\$ 5,387.9	\$ 6,063.0	\$ 6,792.9
Revenue Growth Rate:	%	N/A	25.9%	24.7%	18.9%	15.8%	14.0%	12.5%	12.0%

The End Result: QAT Magic

- **This File:** Takes 8 separate commands to fix
 - **1 Fill Command:** Alt, H, H
 - **QAT Version:** Alt, 3
 - **2 Font Color Commands:** Alt, H, F, C
 - **QAT Version:** Alt, 1
 - **2 Border Commands:** Alt, H, B
 - **QAT Version:** Alt, 5
 - **2 Decimal Place Commands:** Alt, H, 9
 - **QAT Version:** Alt, 8

The End Result: QAT Magic

- **This File:** Takes 8 separate commands to fix
 - **1 Column Width Command:** Alt, H, O, W
 - **QAT Version:** Alt, 7
- **Built-in Shortcuts:** 27 keystrokes required
- **QAT Shortcuts:** 16 keystrokes required (41% fewer)
- **And:** The QAT keystrokes are easier to reach!

Recap and Summary

- **Built-In Excel Shortcuts:** Often cumbersome
- **Better Solution:** Create custom shortcuts for the most common commands and add them to the QAT
- **Method:** Download and import our file below, or create your own QAT shortcuts in the Options menu (Alt, T, O)
- **Result:** 30-40% time savings, adding up to hours or even *days* each week