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:

			Historical		Projected							
Subscription Revenue:	Units:	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

			Historical		Projected							
Subscription Revenue:	Units:	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 <u>variety</u> of shortcuts

Solution: The Quick Access Toolbar

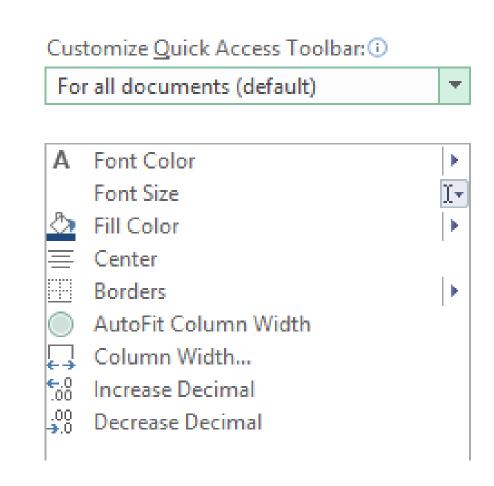
1) Criteria: VERY common shortcut, somewhat long, no existing Ctrl + shortcut, and the mouse isn't easier

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



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

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

 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:

			Historical			Projected				
Subscription Revenue:	Units:	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:

			Historical		Projected									
Subscription Revenue:	Units:	FY12	FY13	FY14	FY15		FY16	F	Y17		FY18		FY19	
	4		4		4									
Total Domestic Streaming Revenues:	\$ M	\$ 2,184.9	\$ 2,751.4	\$ 3,431.4	\$ 4,079.	3 \$	4,725.4	\$ 5	5,387.9	Ş	6,063.0	Ş	6,792.9	
Revenue Growth Rate:	%	N/A	25.9%	25.9% 24.7%		%	15.8%		14.0%		12.5%		12.0%	

- 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

- 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