



PMI TRAINING

Customize Excel For Project Management Professionals Course

Tailor Excel for powerful project management. Master advanced features to track, analyze, and report project data effectively.

DURATION

32 hours

LEVEL

Intermediate

FORMAT

Instructor-Led

- Globally Recognized Certification

- Expert-Led Hands-On Training

- Flexible Scheduling

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COURSE OVERVIEW

The "Customize Excel for Project Management Professionals Course" is an intensive 32-hour intermediate-level program designed to transform how project managers, coordinators, and schedulers leverage Microsoft Excel. This course goes beyond basic spreadsheet functions, diving deep into advanced Excel capabilities to build robust, tailored solutions for every stage of project management, from planning and scheduling to budgeting, resource allocation, and performance reporting. Participants will learn to automate routine tasks, create dynamic templates, and develop powerful dashboards that provide real-time insights into project health, directly aligning with PMI's best practices.

This hands-on course focuses on practical application, enabling participants to design and implement customized Excel tools that directly address their unique project challenges. You will master techniques for creating interactive Gantt charts, detailed budget trackers, earned value management systems, and sophisticated resource management plans. By harnessing the full potential of Excel, including advanced formulas, pivot tables, data validation, conditional formatting, and an introduction to VBA for automation, you will significantly enhance project efficiency, accuracy, and stakeholder communication. This skill set is invaluable for making data-driven decisions and ensuring project success within any organizational context.

The professional benefits of this course are immense. Graduates will be equipped to streamline their project workflows, reduce manual effort, and elevate the quality of their project deliverables and reports. The ability to customize Excel for complex project needs not only boosts individual productivity but also positions professionals as invaluable assets capable of improving project oversight, mitigating risks, and driving successful outcomes. This certification empowers you to take full control of your project data, translating raw information into actionable intelligence.

Duration	32 hours
Level	Intermediate
Vendor	PMI

COURSE CURRICULUM

01 Module 1: Advanced Excel Foundations for Project Professionals

- Review of essential intermediate Excel functions (SUMIFS, COUNTIFS, INDEX, MATCH, VLOOKUP/XLOOKUP)
- Mastering nested functions and array formulas for complex calculations
- Implementing data validation and conditional formatting for robust data integrity
- Utilizing Excel Tables and structured references for dynamic data management
- Introduction to named ranges and their application in project models

02 Module 2: Dynamic Project Planning & Scheduling

- Building custom Gantt charts and project timelines without specialized software
- Managing task dependencies and critical path analysis using Excel formulas
- Creating dynamic project calendars and milestone trackers
- Establishing project baselines and tracking schedule variances effectively
- Scenario analysis for schedule adjustments and risk assessment

03 Module 3: Comprehensive Project Financial Management & Budgeting

- Developing detailed project budgets, cost breakdowns, and expenditure tracking systems
- Implementing earned value management (EVM) calculations and analysis (EV, PV, AC, SV, CV, CPI, SPI)
- Forecasting project costs, cash flow, and managing budget deviations

- Tracking actuals vs. budget and performing variance analysis
- Creating custom cost reports and financial summaries

04 Module 4: Resource Allocation & Capacity Planning in Excel

- Building dynamic resource allocation sheets and utilization reports
- Tracking team member assignments, availability, and skill sets
- Identifying resource conflicts and basic methods for resolution using Excel
- Developing capacity planning models for future projects
- Visualizing resource loading and generating resource forecasts

05 Module 5: Project Tracking, Monitoring & Advanced Reporting

- Designing interactive project dashboards using Pivot Tables, Pivot Charts, and Slicers
- Automating project status report generation and distribution
- Visualizing Key Performance Indicators (KPIs) and project metrics
- Aggregating data from multiple project files and sources
- Creating custom data visualizations and advanced charting techniques

06 Module 6: Automation & Reusable Templates with Introduction to VBA

- Introduction to Visual Basic for Applications (VBA) for project automation
- Recording and editing simple macros for routine project tasks (e.g., formatting, data extraction)
- Developing reusable project templates (WBS, risk registers, stakeholder logs)
- Building user-friendly input forms for data collection
- Strategies for integrating customized Excel solutions into existing workflows

CAREER PATHWAYS

Graduates of this program are prepared for the following roles:

- > **Project Control Officer (PCO) managing intricate project schedules, budgets, and reporting structures.**
- > **Senior Project Coordinator responsible for developing custom tracking tools and supporting multiple project managers with data analysis and reporting.**
- > **PMO Analyst creating standardized project templates, dashboards, and portfolio-level reporting solutions within Excel for organizational consistency.**

FREQUENTLY ASKED QUESTIONS

Q: How will mastering Excel customization in this course specifically improve my project tracking and reporting capabilities for executive stakeholders?

This course will equip you with the skills to design and build sophisticated, dynamic project dashboards and automated status reports. You'll learn to integrate various project data points, visualize key performance indicators (KPIs) through advanced charting and pivot tables, and create interactive reports that allow executives to drill down into specifics. This capability ensures that your reports are not just informative, but also engaging, tailored to stakeholder needs, and provide real-time insights for critical decision-making.

Q: What prior Excel proficiency is expected for optimal success in the 'Customize Excel For Project Management Professionals' course?

This is an intermediate-level course. Participants should have a foundational understanding of Excel, including basic formula creation (SUM, AVERAGE, IF), cell formatting, and navigating worksheets. While we'll review essential concepts, the course quickly progresses to advanced functions, data analysis tools like Pivot Tables, and introduces VBA. A willingness to learn and apply complex Excel features is more important than expert-level existing knowledge.

Q: Can the customized Excel tools and templates developed in this course be adapted for different project methodologies, such as Agile, Waterfall, or Hybrid approaches?

Absolutely. The principles and techniques taught in this course are highly versatile and methodology-agnostic. While examples might lean towards a traditional project structure, the skills in data management, visualization, automation, and reporting are universally applicable. You will learn to build flexible templates that can be customized to track sprints and backlogs for Agile projects, phased deliverables for Waterfall, or integrate elements for hybrid methodologies, ensuring your Excel solutions align with your chosen project management framework.

ABOUT COMPUTER PRIDE



East Africa's Premier IT Training Center

With over 15 years of excellence, Computer Pride delivers globally recognized certification programs from leading technology vendors. Located on Kenyatta Avenue in Nairobi's CBD, our state-of-the-art facilities and expert instructors have empowered thousands of professionals across East Africa.

15+

Years of Excellence

10,000+

Professionals Trained

50+

Vendor Certifications

READY TO ENROL?

Take the next step in your technology career.

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