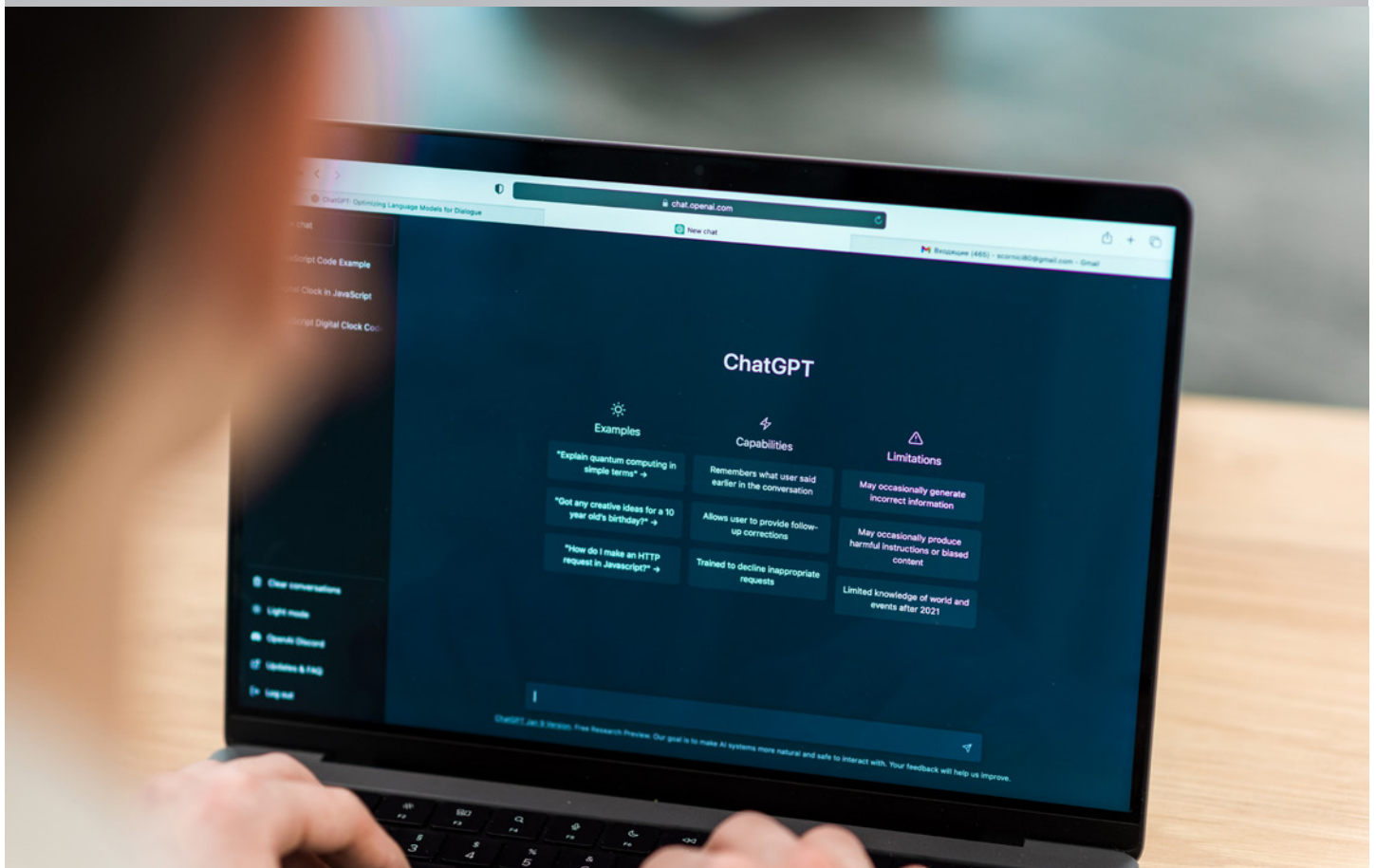


# Excel Excellence with ChatGPT for Smarter Data Analysis and Decision-Making

Learn the process of preparing, cleaning, and analysing data in Excel, and harness the power of ChatGPT to simplify Excel formula solutions.

23 & 24 April 2024 (Tuesday & Wednesday), 9.00am – 5.00pm  
St. Giles Southkey, Johor Bahru



# Excel Excellence with ChatGPT for Smarter Data Analysis and Decision-Making

Are you looking to take your data analytics skills to the next level?

Excel is a powerful tool for data analytics, but it can be overwhelming to navigate. This 2-day programme will guide you through the process of preparing, cleaning, and analysing data in Excel, and show you how to harness the power of ChatGPT to simplify Excel formula solutions for financial analysis.

You will learn how to confidently analyse financial data, identify trends, and make informed decisions to drive business success.

## OBJECTIVES

This programme seeks to help you:

- Learn how to effectively clean and transform data using Power Query
- Analyse data in Excel Dashboard and perform quick analysis with AI-aided features
- Learn how to use ChatGPT to assist with difficult formula solutions
- Gain practical skills to analyse financial data and identify trends
- Apply skills to real-world data analysis scenarios

## METHODOLOGY

Step-by-step instructions, quick tips, exercises, challenges, and case studies for immediate hands-on application.

*Prerequisite: You must have a basic knowledge of MS Excel (2016 & above) and have registered for ChatGPT (free version).*

## WHO SHOULD ATTEND

- Accountants
- Financial Analysts
- Business Executives
- Anyone working with financial data in Excel

## FACILITATOR

### JOANNE KOK YEE LAN

*Msc PAcc, FCCA*

Joanne, an accomplished professional, holds an MSc in Professional Accountancy accredited by the University of London. With her over 30 years of diverse experience in audit, manufacturing, investment holding, and training, she possesses a wealth of knowledge. Her background as a Financial Controller has sharpened her operational and financial analytical skills, consistently achieving remarkable goals. Her expertise yields multi-million-dollar savings through her meticulous attention to detail. Her broad skill set enriches training, benefiting participants.

As a seasoned trainer, she has delivered sessions on Budgeting, Excel Data Management and Analysis, Excel VBA, Power BI Reporting, and other finance-related topics. Her unwavering passion for leveraging technology to enhance work efficiency and effectiveness drives her to continually enrich her training, attracting eager participants. Experience the transformative impact of Joanne's expertise and elevate your skills under her guidance.



Participants are required to bring their own laptop installed with MS Excel (2016 & above).

# Excel Excellence with ChatGPT for Smarter Data Analysis and Decision-Making

## PROGRAMME OUTLINE

### DAY 1: DATA PREPARATION, CLEANING AND ANALYSING

8.30 am – 9.00 am	Registration and Welcome Refreshments
9.00 am – 10.30 am	SESSION 1 <ul style="list-style-type: none"><li>• Data Preparation from the Downloaded Source<ul style="list-style-type: none"><li>&gt; Discover the power of Power Query for data preparation from source files</li><li>&gt; Utilise essential shortcuts to accelerate data cleaning</li></ul></li></ul>
10.30 am – 11.00 am	Morning Refreshments & Networking
11.00 am – 12.30 pm	SESSION 2 <ul style="list-style-type: none"><li>• Data Preparation from the Downloaded Source (<i>continued</i>)<ul style="list-style-type: none"><li>&gt; Ensure data accuracy and completeness through validation techniques</li><li>&gt; Quick data transformation from different data types and sources</li></ul></li></ul>
12.30 pm – 1.30 pm	Lunch & Networking
1.30 pm – 3.00 pm	SESSION 3 <ul style="list-style-type: none"><li>• Summarising and Analysing Data in Excel Pivot Table and AI-Aided Features<ul style="list-style-type: none"><li>&gt; Create pivot tables and charts to analyse data</li><li>&gt; Smart application of Excel features for building simple dashboards</li><li>&gt; Build formulas to calculate key metrics and ratios</li></ul></li></ul>
3.00 pm – 3.30 pm	Afternoon Refreshments & Networking
3.30 pm – 5.00 pm	SESSION 4 <ul style="list-style-type: none"><li>• Summarising and Analysing Data in Excel Pivot Table and AI-Aided Features (<i>continued</i>)<ul style="list-style-type: none"><li>&gt; Highlight critical data with conditional formatting</li><li>&gt; Leverage AI-aided features in Excel for advanced data analysis</li></ul></li></ul>
5.00 pm	End of Day 1

### DAY 2: UNLOCKING THE POWER OF CHATGPT FOR EXCEL FORMULA SOLUTIONS

8.30 am – 9.00 am	Registration and Welcome Refreshments
9.00 am – 10.30 am	SESSION 1 <ul style="list-style-type: none"><li>• Introduction to ChatGPT<ul style="list-style-type: none"><li>&gt; Understand how ChatGPT works and its capabilities</li><li>&gt; Customise prompts for financial analysis</li><li>&gt; Basic troubleshooting and tips for ChatGPT</li></ul></li></ul>
10.30 am – 11.00 am	Morning Refreshments & Networking
11.00 am – 12.30 pm	SESSION 2 <ul style="list-style-type: none"><li>• Using ChatGPT to Solve Excel Formulas<ul style="list-style-type: none"><li>&gt; Identify scenarios where ChatGPT can help solve difficult formulas</li><li>&gt; Step-by-step guidance on how to use ChatGPT to solve specific problems</li><li>&gt; Best practices and tips for incorporating ChatGPT into your analysis workflows</li></ul></li></ul>
12.30 pm – 1.30 pm	Lunch & Networking
1.30 pm – 3.00 pm	SESSION 3 <ul style="list-style-type: none"><li>• Case Studies and Practice<ul style="list-style-type: none"><li>&gt; Hands-on exercises and practice using ChatGPT to solve formulas</li></ul></li></ul>
3.00 pm – 3.30 pm	Afternoon Refreshments & Networking
3.30 pm – 5.00 pm	SESSION 4 <ul style="list-style-type: none"><li>• Case Studies and Practice (<i>continued</i>)<ul style="list-style-type: none"><li>&gt; Real-world financial analysis scenarios where ChatGPT can help</li></ul></li></ul>
5.00 pm	End of Programme

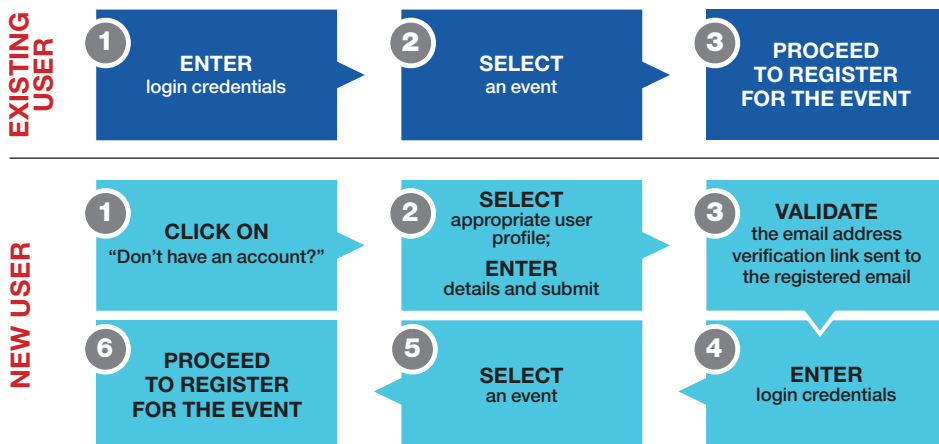
# Excel Excellence with ChatGPT for Smarter Data Analysis and Decision-Making

With immediate effect, enrolment for all CPE programmes will be

**STRICTLY VIA ONLINE REGISTRATION ONLY**

## REGISTRATION PROCESS

- To view more events and download the full brochure, please visit: [pd.mia.org.my](http://pd.mia.org.my)
- Search and select the event
- Click 'Register' to experience the new system by continuing with the respective steps below:



For any assistance, please call (8.45am-5.30pm, Monday-Friday)

**MIA Help Desk @ 603-2722 9000**

## TERMS & CONDITIONS FOR SEMINARS

### PROGRAMME FEE

- Fee is payable to MALAYSIAN INSTITUTE OF ACCOUNTANTS
- Depending on the event, the fee includes course materials and/or lunch and/or tea breaks.
  - **Individual Registration:** Full payment shall be made at the point of online registration.
  - **Corporate Registration:** Full payment shall be made within thirty (30) days from the date of the Invoice or 1 day before the programme, whichever earlier.
- Admittance to the programme shall be granted only upon full payment as per the above requirement.

### PAYMENT MODE

- Payment must be made through the **electronic channels i.e. online payment via the MIA member service portal and electronic fund transfer (EFT).**
- Payment by **cash and cheque is NOT ACCEPTABLE** effective from 1 January 2022.

### HRD CORP (FOR CLAIMABLE EVENTS ONLY)

- MIA is an approved Training Provider registered under 'Institut Akauntan Malaysia' (MyCoID: 631967).

#### Employer's Obligations

- To ensure grant approval is obtained prior to event registration and to provide the Grant ID notification upon event registration.
- To make full payment to MIA as per the issued Invoice within 14 working days upon receipt of MIA's notification in the event the approved training fee is cancelled by HRDC due to non-compliance on the part of the participant or his/her employer or any valid reasons stipulated by HRDC.
- To settle the balance payment to MIA within 14 working days upon receipt of MIA's notification in the event only partial claim is approved by HRDC. MIA will provide copy of the original invoice and will not issue a new invoice for the balance amount.
- If employer has made payment prior to grant approval, a refund will be made to employer subject to reimbursement received from HRDC. Refund will be made upon receipt of duly completed employer's EFT Form.
- To provide required information and/or documents after completion of event for the purpose of HRDC Claim within 7 working days upon receipt of MIA's notification.

### CANCELLATION

Should the participant decide to cancel his/her enrolment, a cancellation policy shall be applied as follows:

- For written cancellation received with minimum seven (7) days' notice from the date of the programme, no penalties will be imposed and full refund will be made to participants who have paid.
- For written cancellation received less than seven (7) days from the date of the programme, an administrative charge of 20% of the registration fee will be imposed. Unpaid registrations will also be liable for a 20% administrative charge.
- No refunds will be made for written cancellations received on the day of the programme or for participants who failed to join the programme. Unpaid registrations will also be liable for full payment of the registration fee.
- Replacing registered participants is not allowed.
- Paid registration that is cancelled can opt to transfer the paid amount to future event(s) after deducting any applicable administrative charges.
- The transfer request to future event(s) should be confirmed by Corporate/Individual within three (3) days after cancellation otherwise the cancellation will be confirmed with refund action. Transfer request will not be entertained after the refund is processed.

- Corporate/Individual is required to top-up the balance amount if the amount to be transferred to the future event is insufficient.
- Any excess amount after transfer will be refunded to the Corporate/Individual's bank account as provided in the EFT form.
- Corporate/Individual is required to provide the EFT form each time when a refund is requested.

### PARTICIPANT'S CLASSIFICATION AND INFORMATION

Category: Corporate/Individual

- Please select the participant classification carefully as it determines the fee payable. No alteration will be allowed upon registration.
- The information on Corporate/Individual provided shall be deemed true and correct. No alteration will be allowed upon registration.

### VERIFICATION OF ATTENDANCE

- All participants are required to present photo identification (NRIC, driving licence or company's ID card) at the point of registration prior to signing the registration list when attending the programme. Admittance may be denied upon failure to present photo identification.

### CERTIFICATE OF ATTENDANCE AND CPE CREDIT HOURS

- Upon full attendance of the programme, participants will be issued an e-certificate of attendance. For this purpose, it is **COMPULSORY** to fill in the email address clearly.
- CPE credit hours will be credited into the MIA Member Services Portal within 14 days of the programme for participants who have complied with all terms and conditions stipulated herein.
- Participants will only be entitled to the CPE hours upon attending the entire duration of the programme. CPE hours will not be accorded for partial attendance.

### COPYRIGHT

The materials of the programme shall not be disclosed or used in any manner, either wholly or partially against any other parties and/or used in any manner, either wholly or partially as a defence by you and/or any other parties under any circumstances. The participants are therefore prohibited from reproducing any materials of this programme. All copyright and/or intellectual property rights in any relevant materials produced in this Programme will remain with the party who produced such materials. MIA disclaims responsibility for the materials of this programme. Neither the MIA, its Council or any of its Boards or Committees nor its staff shall be responsible or liable for any claims, losses, damages, costs or expenses arising in any way out of or in connection with any persons relying upon the materials provided during the programme.

### DATA PROTECTION

Information given by the participants to MIA is true, accurate and to the best of their knowledge. The participants have read and agreed with the Privacy Notice as stated on MIA's official website and therefore, allow MIA to collect, process, store and use the participants' data other than what is provided under the Personal Data Protection Act 2010.

### EXCLUSION OF LIABILITY

This programme shall not constitute an endorsement of the speaker(s) by MIA and MIA shall not be liable for whatsoever circumstances arising from any engagement between the speaker(s) and the programme's participants.

### DISCLAIMER

Malaysian Institute of Accountants (MIA) reserves the right to change the speaker(s), date(s), time(s) and to cancel the programme should circumstances beyond its control arise. MIA shall not be responsible for any costs, damages or losses incurred by the participant due to the changes and/or cancellation. MIA also reserves the right to make alternative arrangements without prior notice should it be necessary to do so. Upon registering, you are deemed to have read and accepted the terms and conditions herein.

## PROGRAMME FEES

Member/Member Firm	RM 1,300
Non-member	RM 1,650

*Preferred Payment: Pay with MIA-CIMB Affinity Credit Card.*

## PROGRAMME DETAILS & REGISTRATION

23 & 24 April 2024 (Tuesday & Wednesday),  
9.00am – 5.00pm

St. Giles Southkey, Johor Bahru

Contact : Siti Adam/Jonathan  
Tel : 07 227 0369  
Fax : 07 222 0391  
Email : [miajbu@mia.org.my](mailto:miajbu@mia.org.my)  
Address : Malaysian Institute of Accountants  
5.03A, 5th Floor Menara TJB  
No. 9, Jalan Syed Mohd Mufti  
80000 Johor Bahru

## HRD CORP (For Claimable Events Only)

Training Programme No.: 10001357622

Scheme Code : HRD Corp Claimable Courses  
–Skim Bantuan Latihan Khas

Type of Training : Public