



# Training Prospectus

Sunesis Consulting

*Business Intelligence  
Company*



Sunesis Consulting  
exists to democratize  
Business Intelligence



# Welcome to *Sunesis Consulting*

*We are committed to offering unrivalled training services*

**14** *Years of experience*

Over 14 years of industry experience

**97%** *Success stories*

Of learners report meeting their learning objectives

**17** *Courses available*

Courses created & available

**Flexible**

Training packages available

**NITA**

NITA have accredited our courses, materials and trainers



*Our 2020-2021 prospectus provides an overview of the courses and qualifications Sunesis Consulting can provide you or your organisation.*

We provide services to clients that enhance business intelligence through skills development and implementation of pragmatic reporting and analytics solutions.

Whether it's keeping up-to-date with regulatory change, developing new skills or enhancing existing ones, we can help you achieve your organizational / personal goals for the fast-growing data technology.

Through our team of highly experienced trainers, we strive to deliver practical, insightful and engaging training.

Our comprehensive NITA approved training courses have been developed and designed to provide practical and technical training for all your staff.

# About us and our company



## Vision

To be the leading business intelligence solution provider in sub-Saharan Africa.

## Mission

Provide services to clients that enhance business intelligence through skills development and implementation of pragmatic reporting solutions.

## Core Values



*We believe in  
Team spirit*



*We act with integrity  
and transparency*



*We take the  
Kaizen approach*



*We uphold  
professional ethics*



# Table of Contents

## Excel Automation & Power Modules **06**

---

<i>Excel Essentials</i>	<b>07</b>
<i>Intermediate Excel</i>	<b>08</b>
<i>Advanced Excel</i>	<b>09</b>
<i>Report Automation in Excel (VBA)</i>	<b>10</b>

## Data Analysis Modules **11**

---

<i>Data analysis &amp; Visualization in Power BI</i>	12
<i>Advanced Data analysis &amp; Visualization in Power BI</i>	13
<i>Data Analytics for Finance Professionals &amp; Auditors</i>	14

## Analytics & Visualization Modules **15**

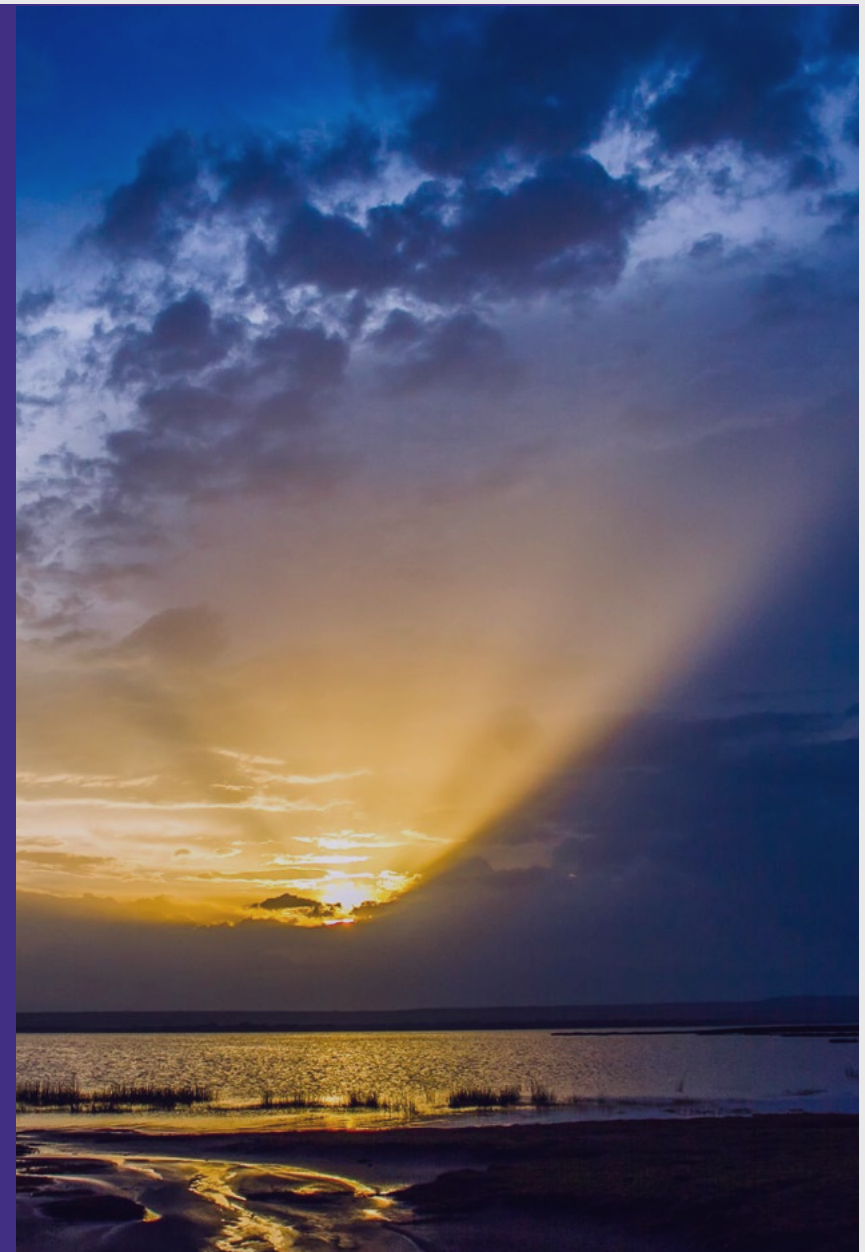
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<i>Advanced Analysis &amp; Visualization in Excel</i>	16
<i>Advanced Excel + Financial Modeling &amp; Forecasting in Excel</i>	17
<i>Advanced PowerPoint</i>	18

## Programming & Database **19**

---

<i>R for Data Science</i>	20
<i>Python for Data Science</i>	21





# Excel Automation & Power Modules



*Become more effective in your reporting processes. Gain useful data manipulation skills!*



# Essentials Excel

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

Designed for those who are relatively new to Excel and who maintain data and perform regular analysis on information such as petty cash management, accounting for travel disbursements and reimbursements, tracking product sales, vehicle service monitoring and reporting.

## Pre-requisites

There are no formal prerequisites, but you should have some familiarity with computers and Windows 10.

## Course Brief

Understanding the MS Excel environment

Using the dollar sign -\$- to create robust formulas (relative, absolute, and mixed references)

Calculating summaries using formulas: SUM, AVERAGE, COUNT, COUNTA, MAX, MIN, ROUND, IF

Manipulating data lists:

- Sorting & Filtering data; Find & Replace; Freezing panes to show important data while scrolling; adding comments; Text-to-column feature

Formatting basics:

- Applying borders, colour & number formats, save time using the Format painter to replicate formatting, Remove gridlines etc.
- Reporting using Excel tables; Grouping Feature in Excel

Selecting special types of cells using Go-to Special [Fill in blanks, visible cells only, etc.];

Useful shortcuts to improve productivity (CTRL+B, CTRL+Z, CTRL+Y, CTRL+U, CTRL+T, CTRL+1)

Useful Paste-Special features (Formats, Formula, Value, Transpose, etc.);

Working with charts:

- Selecting right chart; Chart examples -column, bar, line; Customizing chart elements, Charts dos and don'ts

Prepare worksheet for printing (margins, page breaks, print area, printing headings on each page)

## Expected Outcome

Apply and differentiate between the various ways of cell-referencing

Use basic formulas to calculate basic summaries  
Prepare reports for printing in Excel

Choose the appropriate chart among alternatives and integrate charts in their reports

## Target Group

- Beginners

# Intermediate Excel

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

This course is tailored for participants who perform regular analysis on business information like product/service performance, operational expenses, payroll/wage processing, bank reconciliations, tracking employees' info, etc. and expect exceptional figures and trends to be easily spotted as a basis for decisions (e.g. overdue invoices, sales over target, missing/repeated records etc.)

## Pre-requisites

Delegates need to have good grounding on Excel Essentials concepts.

## Course Brief

- The use of (\$) for Cell referencing (*locking formulas*)
- Useful data cleansing processes (*comparing lists, identify & remove duplicates*)
- Testing specified conditions using logical functions (*IF, Nested-IF and Ageing analysis*)
- Handling genuine errors result by use of *IFERROR*
- Using Text functions (*LEFT, RIGHT, TRIM, CONCATENATE*) to return the number of specified characters from a given text or join two/more text strings; Using the *Flash-Fill* feature
- Retrieving and reconciling data made easier by use of *VLOOKUP, HLOOKUP*
- Excel features to make powerful charts
- Manipulating dates (*MONTH, TODAY, WORKDAY, YEAR, DATE*)
- Control user input in a worksheet using Data Validation (*drop-down lists, dates validation*)
- Consolidating data from multiple worksheets (*by Position, by Category, using a Formula*)
- Summarizing data using *PIVOT-TABLES*
- Apply cell formatting using inbuilt Conditional Formatting.

## Expected Outcome

Use various techniques such as VLOOKUP and TEXT functions to manipulate data

Present data summaries (reports) visually through charts and conditional formatting

Use Pivot Tables to summarize large volumes of data

## Target Group

- Analysts
- Finance Professionals
- Customer Care Reps
- HR Professionals
- Executives
- Marketers & Sales Reps
- Procurement specialists



# Advanced Excel

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

This course is tailored for those faced with the task of analysing large, and usually unstructured data sets to provide useful insights for decision making. It is for experienced Excel users tired of VLOOKUP short-comings while consolidating data and are looking for flexible methodologies to analyse, visualize and present reports. Managers and Executives who manage, analyse and prepare reports for managerial discussions will find this course most beneficial.

## Pre-requisites

Regular Excel users competent with our Intermediate Excel concepts

## Course Brief

### Advanced Data Manipulation Techniques

- Avoid typing a column index number in VLOOKUP by combining VLOOKUP + MATCH functions.
- Say good-bye to VLOOKUP and hello to INDEX + MATCH for two-way (matrix) lookups, as well as a right- to-left lookup

### Methods of Summarizing Data

- Data Consolidation by position
- Working with INDIRECT to consolidate data from multiple worksheets.
- Conditional aggregation with multiple criteria (SUMIFS, COUNTIFS & AVERAGEIFS)

### Sensitivity Analysis & Modeling in Excel

- Sensitivity ("What-if") analysis on models using Data Tables, Goal Seek
- Laying out a model in Excel

### Methods of Summarizing Data

- Maximizing on the power of PIVOT-TABLES

### Visual Reporting & Interaction

- Make reports more insightful with formula-driven Conditional Formatting
- Spark lines to show trends
- Combine SUMIFS with pick lists, for data slicing and creating interactive charts
- Introduction to form controls (option buttons for report interaction)

## Expected Outcome

Apply advanced lookups on data extracted from external sources

Use advanced techniques for report visualizations

Leverage on various methodologies of summarizing data

Understand and apply basic principles of laying out Excel models for decision making

## Target Group

- Analysts
- Finance Professionals
- Executives
- HR Professionals
- Procurement specialists

# Report Automation in Excel (VBA)

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

This course is designed for users who have leveraged on the rich set of features in the standard Excel user interface BUT are looking for an easier and faster way to perform mundane, repetitive data manipulation, analysis and reporting processes. By using Excel VBA for automation, you can significantly cut down the time you spend repeating these steps and improve your overall productivity. Further you can use VBA to build new capabilities into Excel for enhanced data visualization and building professional dashboards and interfaces.

## Pre-requisites

Ideal candidates for this module need to be thorough with concepts covered in our Advanced Excel.

## Course Brief

- Getting started with VBA Programming: Recording, storing a macro, using VB Editor, understanding data types, code presentation, working with Message and Input Boxes, difference between a sub routine and a function.
- Working with Variables, Constants and Arrays: Declaring variables and constants, scope of variable/constant, declaring, assigning and using an array, Illustration: using variables, constants and arrays
- The Excel Objects Framework: Properties and methods, Object Hierarchy & Collections
- Controlling Program Flow and Decisions: Applications of Excel VBA Control Statements, exiting control structures
- Working with Ranges and/or Cells: Defining a range/cell, the Range and the Cell property, the offset property of a range, rows and columns, reading values from one cell to another or to a variable.
- Working with other workbooks and files: Referencing workbooks and worksheets, get the path and full name, Importing sheets/data
- Automation Using Events: Understanding event handlers, workbook, worksheet and chart events
- Forms and Controls: Creating customized dialog boxes, launch and close a userform, assigning codes to userform controls
- Error Handling and Macro Debugging: Common errors and how to troubleshoot, on Error GoTo, On Error Resume Next.

## Expected Outcome

Create usable macros using VBA language on the VB Editor

Use VBA to automate report generation processes

Debugging tools and error handling methods

Different ways to reference ranges and cells

How to work with data types

## Target Group

- Business Professionals seeking to simplify & automate daily Excel tasks
- Finance Coordinators, Finance Managers
- Finance Analysts, Business Analysts, Data Analysts
- Developers

# Data Analysis Modules



*Connect, Integrate, Model and  
Visualize Business Data Reliably!*



# Data analysis & Visualization in Power BI

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

This is a three day training for those looking for a way to unify various data sources (usually with millions of rows) and create measures that can give a single source of truth of the business health. Attendees should be comfortable with Excel Pivot Tables and Excel Functions like SUMIFS and VLOOKUP.

## Pre-requisites

This course is widely attended by SQL Server report creators with intentions of expanding their skills in the field.

## Course Brief

### Getting Started

- The Microsoft Business Intelligence environment (overview of Power Query, Power Pivot & Power BI), understanding how Power BI Desktop is organized-the interface

### Data Acquisition and Transformation (ETL) using Power BI Desktop

- Importing data from various sources, the Query Editor: Tidying up the data model, combine various data sets -merge versus append queries using examples

### Data Modeling -Integrate from multiple sources

- Introduction to columnar table relationships, cardinality and cross-filtering, practice creating a data model, understanding differences between measures and calculated columns, custom sorting of columns such as month names, hiding tables and columns

### Must-Know DAX Functions

- Time intelligence functions

### Data Visualizations

- The Report Canvas, modern visuals, custom formatting visuals, adding interaction, **report Distribution**, uploading data/report to Power BI cloud, creating a dashboard through pinning and Q&A, sharing and Mobility,

## Expected Outcome

Understand table relationships and how to create data models

Learn and apply must-know Data Analysis Expressions (DAX) to create measures in the Power Pivot window

Work with modern data visuals/charts

## Target Group

- Everyone who deals with data
- Power BI beginners
- Analysts
- Developers, IT Professionals, Solution Architects, Technical Specialists
- Project Manager, Business Executives, C.I.O, C.T.O, C.F.O

# Advanced Data analysis & Visualization in Power BI

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

This is a five day training. In this course we will tackle business scenarios where you will learn, how to use Power BI and advanced / complex DAX calculations further to derive more insights from data. We are using SQL Server Adventure Works Data warehouse as a sample database, and the Contoso dataset. We will hold your hand and walk you through each scenario step-by-step.

## Pre-requisites

This course is widely attended by SQL Server report creators with intentions of expanding their skills in the field.

## Course Brief

### Session 1: Getting Started

- The Microsoft Business Intelligence environment (overview of Power Query, Power Pivot & Power BI), understanding how Power BI Desktop is organized-the interface

### Session 2: Getting Data and Data Transformations

- Overview of connecting to data sources, Performing transformations, Cleansing data,

### Session 3: Data Modeling

- Create and optimize data models, Create calculated columns, calculated tables, and measures

### Session 4: Data Visualization

- Create and format interactive visualizations

### Session 5: Report Distribution

- Introduction to security for dashboards, reports and apps, Publishing and embedding reports, Overview on configuring apps and apps workspaces, Create dashboard from scratch led by instructor (Fully depended on the speed and understanding on the participants)

## Expected Outcome

Use DAX (Data Analysis Expressions) to get Business Performance, Patterns and Trends from Data

Create advanced powerful calculations using Measures, calculated columns & DAX Formulas

## DAX TIME-INTELLIGENCE

Turn data into insight and interactive visualizations to tell a story

Collaboration and sharing of content on Microsoft's Powerful platform

## Target Group

- Power BI advanced users
- Analysts
- Developers, IT Professionals, Solution Architects, Technical Specialists



# Data Analytics for Finance Professionals & Auditors

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

This course aims to supercharge your MS Excel prowess for data manipulation, analysis and presentation to management. Learn to solve common business problems through completing real world exercises in Excel.

## Pre-requisites

The ideal candidate need to have strong data analysis skills and **MUST** be good with Excel at an Advanced level.

## Course Brief

### Session 1: Data Cleansing and Integration in Excel

- Compare two lists of data, Extract a number of characters from a text using Text functions, Retrieving data from a database lookups, Combine data from multiple sheets using INDIRECT function

### Session 2: Data Mining Tools in Excel

- Functions to analyze a company's business performance, Build dynamic data tables for sensitivity and scenario analysis for Budgets, Prepare final accounts from a TB

### Session 3: Telling a Story with Visuals

- Guide to choose the right; Creating and customizing charts, Advanced chart concepts dual axis charts, Creating dynamic scrolling charts, Conditional formatting of charts, Non standard charts and their usage, Creating and editing conditional formatting, Customer number formats

### Session 4: Tools for Creating Dynamic Excel Dashboards

- Create interactivity, Enhancing the feel and look of dashboards using shapes, the Camera tool and/or Linked Pictures, Guidelines/Considerations of dashboard design.

### Session 5: Extending Excel with Power Query and Power BI a primer session

- Working with multiple sources of data, Automating common data shaping tasks using Power Query, A sneak preview of the Power BI suite for real time dashboards

## Expected Outcome

### Earn 15 Structured CPD Hours from ICPAK

Will learn about emerging MS Excel and Power BI technologies for business analytics

Will gain advanced analytical skills to shape, manipulate and visualize business data

Will create a dynamic Excel dashboard from raw data

## Target Group

- Accountants, Credit Officers
- Analysts & Controllers
- Finance Managers, Budget Managers
- Tax Professionals
- CFOs

# Analytics & Visualization Modules



*Make the process of "Data to Decisions" efficient and cost effective*



# Advanced Data Analysis & Visualization in Excel

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

This module aims at making the process of “Data to Decisions” efficient and cost effective. This will be achieved by maximum utilisation of the most basic, easily available and affordable reporting tool MS Excel.

## Course Brief

### Overview of Excel Dashboards

- What is it? What value do you gain from Dashboards?, Dashboard Design Principles -what do you need to know?, Components of a Dashboard, Excel Dashboards Product Demo

### Prepping your data for analysis

- Cleaning your data, Applying DATE & TEXT functions, Combining MATCH function with VLOOKUP and INDEX functions

### Data Analysis -Part 1

- Build robust formulas -correctly apply \$ sign to lock formulas, SUMIFS & COUNTIFS -your friends for dynamic analytics, Named Ranges & Data Validation

### Data Analysis -Part 2

- Converting to Percentages, Grouping data fields (Dates), Viewing Top/Bottom items (or Top/Bottom 10%), Connecting different reports to a single slicer -make interactive dashboards, How to make a slicer static

### Advanced Charting Techniques

- Select the right chart for your data, Editing and customizing chart elements, Linking title text to a cell Analytical charts, Scrolling charts

### Adding Interactivity

- Drop-down (Pick) lists with charts, Building Navigation Buttons -hyperlinks, Excel Camera tool / Picture Links, Using shapes for stylish dashboards -linking shapes to your analysis

## Included in this course

A comprehensive manual of content covered

Certificate of participation

On-going help: you can always e-mail the facilitator

Meet industry peers and hear how they approach this subject

## Target Group

- Finance Managers
- Business Analysts, Finance Analysts, Data Analysts
- CFOs, CTOs, CIOs

## What is different with this module?

We partner with Strathmore University to offer open trainings in Advanced Analysis & Visualization in Excel.

# Advanced Excel + Financial Modeling & Forecasting

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

The course aims at equipping delegates with skills to efficiently build an effective and robust financial model based on real-world financial modelling challenges.

## Pre-requisites

The ideal candidate need to have strong data analysis skills and MUST be good with Excel at an Advanced level."

## Course Brief

### Advanced Data Manipulation Techniques

- Combining VLOOKUP + MATCH functions, INDEX + MATCH for two-way (matrix) lookups, as well as a right- to-left lookup, Working with TEXT functions, Iterations switch, Grouping of data.

### Sensitivity Analysis & Modeling in Excel

- Sensitivity ("What-if") analysis on models using Data Tables, Goal Seek, **Introduction to Financial Modelling**, Why are Financial Models used?, General Structure and model design

### Historical Data

- Sources of information, Presentation of historical data, Analysis of Historical Data

### Projection Schedules

- Revenues, Costs, Fixed asset, capital expenditure and depreciation expenditure, Amortization schedule, Working capital, Shareholders' equity schedule, Shares outstanding schedule

### Income Statement Drivers

- Revenues, Costs, Operating Expenses, Income taxes, Equity income

### Balance Sheet Drivers – Assets

- Working capital, Cash and cash equivalents, Accounts receivables, Fixed assets

### Balance Sheet Drivers – Liabilities

- Short-term debt, Accounts payable, Deferred taxes, accrued liabilities and other current, liabilities, Equity

### Balancing the Cash Flow Statement

- Calculating cash flow from operations, investing activities & financing activities

## Expected Outcome

Create your own quantitative models

Harness the power of spreadsheets to map and predict data

Structure your decision-making for optimum results

Understand the measurement and management of risk

## Target Group

- Finance Analysts, Research Analysts, Business Analysts
- CFOs
- Risk Managers
- Business Advisory / Management Consultants
- Banking / Credit Advisors

# Advanced Power Point

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

Our Microsoft PowerPoint Advanced course is exciting to both new and existing users. It equips users with the essential understanding and skills to be able to master the friendly features of this popular presentation software.

## Course Brief

### Speed boosters

- Effective shortcuts that you wish you knew before; quick access toolbar;
- Working with slide masters for corporate branded ppt & time saving techniques
- Faster ways to copy paste and align shapes

### Creative presentations (strategies to reduce text overload)

- Project timelines
- Creating infographic icons in PowerPoint
- Non-standard charts and how to create them
- Working with charts, shapes and SmartArt graphics
- Using special fonts
- Importing and linking data from Excel

### Use animations creatively in a corporate context

- Draw attention using fades
- Working with multimedia (Video & Sound Clips, Recording);
- Navigation techniques (Hyperlinks and Action Buttons)

### Delivering a Presentation

- Using Presenter View & Presenter Notes; Custom

### Shows

- Distributing a presentation
- Sample slide makeovers

## Included in this course

- 1-day worth of instructor-led, practical and interactive training
- A course pack including all presentation slides
- A certificate.

## Target Group

- Anyone seeking to improve their PowerPoint Presentation skills



# Programming & Database



*Learn how to program in R and Python for effective data analysis.*



# R for Data Science

**BOOK NOW**



**Training Method**  
*Classroom*

## Overview

In this course you will learn how to program in R and how to use R for effective data analysis. You will also understand the process of installing and configuring software necessary for statistics programming. It covers practical issues in statistics computing using R.

## Course Brief

### Learn about Exploratory Data Analysis and why it is Important

- Effective shortcuts that you wish you Ubiquity of Data, Explore Word Trends, Why Learn EDA (Exploratory Data Analysis), Goals of EDA, Our Approach for the Training, Training Overview

### R Basics

- The power of R. Why R?, RStudio Installation on Windows and Mac, RStudio Layout, Demystify R & Getting Help on RStudio, Read and Subset Data, Factor Variables, Data Munging, Chit chat on R, One Variable.

### Learn how to quantify and visualize individual variables within a dataset

- Using histograms, boxplots and transforms. i.e. Pseudo-User data and Histogram, Faceting, Outliers and Anomalies, Limiting the Axes e.t.c

### Learn techniques of exploring relationship between two variables

- Using scatter plots, line plots and correlations. i.e. Scatter plot, GGPlot Syntax, Overplotting e.t.c

**Conditional Means.** Learn powerful methods for examining relationships among multiple variables and how to reshape data

## What key skills will I gain in this course?

Collect detailed information using R profiler

Configure statistical programming software

Make use of R loop functions and debugging tools

Understand critical programming language concepts

## Target Group

- Biostatisticians
- Data Scientists
- Data Analysts
- Econometricians
- Researchers
- Economists

# Python for Data Science

BOOK NOW



Training Method  
Classroom

## Overview

This introduction to Python for Data Science will kickstart your learning of Python for data science.

## Course Brief

### Introduction

- Learn what data scientists do, receive an introduction to Python's most common data science libraries, and get hands on practice working with data.

### Problem Set 1: Titanic Survivor Data

- Practice using NumPy and Pandas to predict survival rates for Titanic passengers.

### Data Wrangling

- Learn to access, process, and clean different types of data.

### Problem Set 2: Wrangling Subway Data

- Practice your data wrangling skills with data.

### Data Analysis

- Get an introduction to important data analysis tools used by data scientists, including statistical tests and machine learning models.

### Problem Set 4: Visualizing Subway Data

- Apply data visualization techniques to explore and explain a dataset.

### MapReduce

- Learn how to work with massive amounts of data using MapReduce and other big data tools.

### Problem Set 5: MapReduce on Subway Data

- Practice using MapReduce.

What key skills will I gain in this course?

Data Science

Python Programming

Numpy

Pandas

## Target Group

- Data Analysts
- Data Scientists
- Risk Managers
- Business Analysts
- Geologists

# Enquire



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