



ADVANCED MICROSOFT EXCEL FOR PROPERTY VALUATION PROFESSIONALS

Two-Day Professional Training Programme

Practical Excel Skills for Property Valuation, Investment Analysis and Real Estate Decision-Making

Duration 2 Days / 16 Hours	Format Hands-on Practical	Level Intermediate to Advanced	Output Valuation Workbook
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Programme Overview

This intensive two-day programme is designed specifically for property valuation professionals, estate surveyors, real estate consultants, property analysts, asset managers and property developers. The programme equips participants with practical Microsoft Excel skills required to analyse property data, perform valuations, undertake investment appraisals, build discounted cash flow models, conduct scenario analysis and develop professional valuation dashboards and reports.

Theme	Leveraging Microsoft Excel for Efficient Property Valuation, Financial Modelling and Real Estate Analytics
Target Audience	Property Valuers, Estate Surveyors, Real Estate Consultants, Property Analysts, Asset Managers, Property Developers, Quantity Surveyors and Municipal Valuation Officers.
Duration	2 Days (16 Hours)
Training Methodology	Instructor-led demonstrations, hands-on practical exercises, case studies, group activities, real-world datasets and capstone modelling projects.

Training Objectives

1. Organise and manage large property valuation datasets.
2. Perform property market analysis using Excel.
3. Build automated property valuation models.
4. Conduct comparable sales analysis.
5. Perform investment appraisal and feasibility studies.
6. Carry out discounted cash flow valuations.
7. Create rental yield and capitalization models.
8. Develop property investment dashboards.
9. Automate repetitive valuation tasks using advanced Excel functions.
10. Build professional valuation reports and visualisations.

Coverage

Day 1 Coverage	Day 2 Coverage
Property databases and data cleaning	PV, FV, PMT, RATE, NPER
Data validation and conditional formatting	NPV, XNPV, IRR, XIRR
IF, IFERROR, SUMIFS, COUNTIFS, AVERAGEIFS	Goal Seek and Scenario Manager
XLOOKUP and INDEX-MATCH	Data Tables
Pivot Tables and Pivot Charts	Integrated property valuation model
Date functions (EOMONTH, YEARFRAC, DATEDIF, NETWORKDAYS)	Dashboard and automated reporting
Statistical functions (MEDIAN, STDEV.S, PERCENTILE)	

This is manageable because these skills are directly applicable to valuation practice.

Core Functions and Tools

Skill Area	Functions and Tools Covered
Data Management	Sort, Filter, Data Validation, Conditional Formatting, Remove Duplicates, Text to Columns, SUBTOTAL
Logical and Lookup	IF, IFERROR, SUMIFS, COUNTIFS, AVERAGEIFS, XLOOKUP, INDEX, MATCH
Date and Statistical	TODAY, EOMONTH, DATEDIF, YEARFRAC, NETWORKDAYS, MEDIAN, STDEV.S, PERCENTILE
Financial and Valuation	PV, FV, PMT, RATE, NPER, NPV, XNPV, IRR, XIRR
Analysis and Reporting	Pivot Tables, Pivot Charts, Slicers, Goal Seek, Scenario Manager, Data Tables

- Participants should have basic Excel knowledge.
- The training will be highly hands-on.
- Every function will be taught through property valuation cases such as comparable sales, rental analysis, DCFs and investment appraisals rather than generic examples.
- Pre-built datasets and templates will be provided so that time is spent on application rather than data entry.

Detailed Two-Day Training Programme

DAY 1: PROPERTY DATA MANAGEMENT AND MARKET ANALYSIS

0800-1000

Excel Essentials for Property Valuation

This opening session establishes the workbook discipline required for valuation practice. Participants learn how to structure property valuation workbooks, design clean property databases, standardise data capture and prepare datasets for later modelling and analysis.

Excel Functions and Tools Covered:

- Data Validation
- Conditional Formatting
- Format Painter
- Freeze Panes
- Sort
- Filter
- Custom Number Formatting
- Text to Columns
- Remove Duplicates
- Flash Fill
- SUBTOTAL

Property Valuation Applications:

- Creating property databases
- Standardising valuation records
- Cleaning comparable sales datasets
- Managing rental registers
- Preparing valuation schedules for analysis

Practical Exercise: Create a property register and valuation database containing property ID, property type, address, suburb, stand size, building size, purchase price, current value, monthly rental, vacancy status and valuation date.

1030-1300**Functions for Property Analysis**

This session focuses on the core Excel functions required to analyse property datasets and automate repetitive valuation calculations. The emphasis is on comparable sales, rental benchmarks, property categorisation and price per square metre analysis.

Excel Functions and Tools Covered:

- IF
- IFS
- IFERROR
- AND
- OR
- SUM
- SUMIFS
- COUNT
- COUNTIFS
- AVERAGE
- AVERAGEIFS
- MIN
- MAX
- XLOOKUP
- INDEX
- MATCH

Property Valuation Applications:

- Comparable sales analysis
- Rental benchmark retrieval
- Price per square metre calculations
- Automated property categorisation
- Valuation assumption retrieval
- Flagging incomplete valuation records

Practical Exercise: Build a comparable sales model that automatically retrieves recent comparable sales, rental benchmarks, market prices and valuation assumptions.

1400-1530**Property Market Analysis Using Pivot Tables**

This session enables participants to turn large valuation datasets into useful market intelligence. Participants learn to summarise sales, rentals, vacancies and property categories quickly using PivotTables and visual reports.

Excel Functions and Tools Covered:

- Pivot Tables
- Pivot Charts
- Slicers
- Timelines
- Grouping
- Calculated Fields
- SUBTOTAL

Property Valuation Applications:

- Average values by suburb
- Rental trends
- Vacancy analysis
- Market segmentation
- Sales trends
- Property type analysis

- Portfolio summaries

Practical Exercise: Develop an interactive property market dashboard showing average values by suburb, rental trends, property categories, occupancy levels and investment returns.

1530-1700

Statistical and Date Functions

This session introduces the statistical and date functions required to analyse market movement, lease periods, time adjustments and valuation comparables.

Excel Functions and Tools Covered:

- MEDIAN
- MODE.SNGL
- STDEV.S
- PERCENTILE.INC
- RANK
- TODAY
- NOW
- DATE
- YEAR
- MONTH
- DAY
- EOMONTH
- DATEDIF
- YEARFRAC
- NETWORKDAYS
- WORKDAY

Property Valuation Applications:

- Lease calculations
- Remaining lease periods
- Market appreciation analysis
- Time adjustments for comparable sales
- Ranking properties by value, yield or rental level
- Identifying price dispersion and market volatility

Practical Exercise: Calculate average property prices, appreciation rates, remaining lease periods, valuation dates and time-adjusted comparable sales.

DAY 2: VALUATION AND INVESTMENT MODELLING

0800-1000

Property Financial Modelling

This session develops the financial modelling skills required for mortgage analysis, development finance, acquisition analysis and loan affordability calculations.

Excel Functions and Tools Covered:

- PV
- FV
- PMT
- RATE
- NPER
- IPMT
- PPMT

Property Valuation Applications:

- Mortgage calculations
- Loan amortisation schedules

- Development financing
- Property acquisition analysis
- Loan affordability analysis
- Interest and principal split calculations

Practical Exercise: Build a commercial property financing model showing loan amount, interest rate, repayment period, monthly repayment, interest component and principal component.

1030-1300

Discounted Cash Flow (DCF) Valuation

This session guides participants through the development of a professional discounted cash flow model for income-producing property. Participants learn how to model rental income, vacancy, expenses, net operating income, terminal value and investment return metrics.

Excel Functions and Tools Covered:

- NPV
- XNPV
- IRR
- XIRR
- SUMPRODUCT
- INDEX
- MATCH

Property Valuation Applications:

- Commercial property valuation
- Investment property valuation
- Terminal value calculations
- Discount rate analysis
- Cash flow modelling
- Net operating income calculations
- Exit value analysis

Practical Exercise: Develop a five-year discounted cash flow valuation model for a commercial property.

1400-1530

Sensitivity and Scenario Analysis

This session equips participants to test how changes in key assumptions affect property value and investment feasibility. The focus is on risk, uncertainty and decision-making under changing market conditions.

Excel Functions and Tools Covered:

- Goal Seek
- Scenario Manager
- One-Variable Data Tables
- Two-Variable Data Tables
- Data Validation
- IF
- INDEX
- MATCH

Property Valuation Applications:

- Rental growth scenarios
- Occupancy scenarios
- Exit yield analysis
- Capitalisation rate sensitivity
- Construction cost sensitivity
- Discount rate sensitivity
- Feasibility testing

Practical Exercise: Conduct a property feasibility assessment under alternative rental growth, vacancy, discount rate and exit yield assumptions.

1530-1700

Integrated Valuation Model and Reporting

The final session consolidates the two-day course into a practical capstone project. Participants combine database management, comparable sales, rental analysis, DCF valuation, sensitivity analysis and reporting into one integrated valuation workbook.

Excel Functions and Tools Covered:

- XLOOKUP
- INDEX-MATCH
- SUMIFS
- COUNTIFS
- AVERAGEIFS
- IFERROR
- CONCAT
- TEXT
- TEXTJOIN
- Pivot Tables
- Pivot Charts
- Conditional Formatting
- Slicers

Property Valuation Applications:

- Automated valuation reports
- Executive dashboards
- Comparable sales schedules
- Rental yield calculators
- Portfolio reporting
- Dynamic valuation templates
- Management reporting

Practical Exercise: Capstone project: develop an integrated property valuation workbook suitable for professional practice. The workbook should include a property database, comparable sales model, rental analysis, DCF valuation, sensitivity analysis, executive dashboard and automated valuation report.

Key Excel Functions Covered During the Programme

The programme deliberately focuses on core functions and tools that property valuation professionals can immediately apply in valuation work, investment appraisal, rental analysis and reporting.

Category	Functions / Tools
Data Management	Data Validation, Sort, Filter, Flash Fill, Remove Duplicates, Text to Columns, Conditional Formatting and SUBTOTAL.
Logical Functions	IF, IFS, IFERROR, AND and OR.
Lookup Functions	XLOOKUP, INDEX and MATCH.
Statistical Functions	AVERAGEIFS, MEDIAN, MODE.SNGL, STDEV.S, PERCENTILE.INC and RANK.
Date Functions	TODAY, NOW, DATE, YEAR, MONTH, DAY, EOMONTH, DATEDIF, YEARFRAC, NETWORKDAYS and WORKDAY.
Financial Functions	PV, FV, PMT, RATE, NPER, IPMT, PPMT, NPV, XNPV, IRR and XIRR.

Reporting and Analytics Tools

Pivot Tables, Pivot Charts, Slicers, Timelines, Grouping, Calculated Fields, Goal Seek, Scenario Manager and Data Tables.

Recommended Excel Skills Matrix for Property Valuers

Skill Area	Importance
Data Cleaning	Very High
XLOOKUP	Very High
INDEX-MATCH	Very High
Pivot Tables	Very High
Statistical Functions	Very High
Financial Functions	Very High
Discounted Cash Flow Modelling	Critical
Scenario Analysis	Critical
Dashboard Development	Critical
Data Visualisation	High
Report Automation	High

Training Outcome

Participants leave with a fully functional, industry-standard property valuation and investment modelling workbook that can immediately be used in professional practice. The workbook will combine a structured property database, comparable sales analysis, rental analysis, discounted cash flow valuation, sensitivity analysis, executive dashboard and automated valuation report.

Contact Information

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