

Custom Excel add-in

Case Study

Financial Edge was approached by one of Wall Street's top investment banks for help building a custom Excel add-in. Their existing add-in was no longer being updated or supported and they needed something built from the ground up that was more robust, capable, and customisable to better support their analysts. Financial Edge had previously delivered new hire training programs to the client, and so could be trusted to build it after proving our mastery of Excel and understanding of the client's internal requirements.

CLIENT

Elite investment bank (top 3)

PROGRAM

Custom Excel add-in

PARTICIPANTS

All analysts globally, and US interns

INSTRUCTORS

Two Excel experts

Lead expert:



Rob Smith

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HEAD OF R&D

1. The Background



Experience

Financial Edge uses custom Excel add-ins to support the delivery of classroom training, allowing our instructors to demonstrate the building of formulas and models more quickly. This existing familiarity with the intricacies of Excel add-ins meant we had plenty of experience to draw upon when building one for a client.



Integrated

The add-in was used by FE instructors throughout the training, enabling participants to familiarise themselves with the shortcuts. Once they moved onto the desk, they could immediately take advantage of features that help them build models faster and error-free.

2. The Solution



Bespoke-built

The secret to the success of this project lay in our intimate understanding of the client built through our existing training relationship.



Comprehensive

The tool was developed collaboratively and iteratively to ensure all requirements were met. The Excel add-in enhances productivity for the deal team to build error-free, accurate models, with shortcuts and tools that support and promote best practice. The tool lets the client's deal team apply internal standards using keyboard shortcuts or via the tailored toolbar. Shortcut keys were aligned to existing preferences, but can also be configured. Tool options include: autocolor formatting, precedent and dependent tracers for auditing formulas and customisable workbook formatting options, which automatically identifies hard-coded errors and number constants.

3. The Impact



Continuous Improvement

The client was extremely impressed and happy with the rollout and iterative development. We remain in dialogue with client, and are constantly improving the product, guided by their requirements. Financial Edge is deepening a great relationship with the client and developing a clear roadmap for future versions. The client shares ongoing priorities and challenges such that Financial Edge can respond with bespoke solutions to further enhance the productivity of the client's interns, analysts, and associates.

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Solution Your Team Deserve**

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