



## CUSTOM CONSULTING

### UPSKILLING YOUR EXCEL

#### About the Course

Become more productive and self-reliant by mastering the world's most popular productivity tool! A recent study identified that almost 750 million people worldwide use MS Excel but most are just scratching at the surface of what Excel can do for them in business. Many people think of MS Excel as a sophisticated "number crunching" program to be used mainly by financial departments to show figures and by others to simply keep records. In truth, MS Excel is a powerful business tool that should be used by every person in an organisation to store, analyse and present data in order to make better business and managerial decisions.

This 3-day "Excelling at MS Excel" course will grow your knowledge of the programme exponentially, introducing you to new ways of using the programme and teaching you the skills needed to organise, calculate, evaluate and find data quickly and efficiently. You will cover correct ways to set up and link spreadsheets and discover how to use "built" in specialist capabilities such as Functions, Macros, PivotTables and Data Validation tools that we all know exist, but don't really know how to effectively use. We guarantee that if you attend this programme, you will go back and redesign your spreadsheets, making them more efficient and effective as a business tool to support your role in the organisation, allowing you to do more in less time, with Excel, than you ever have in the past.

Our 3 day "Excelling at MS Excel" training course will help you to unlock the full potential of one of the most powerful business tools at your disposal - helping you to stand out from your colleagues, improving the quality of your analysis and decisions and assisting in your own professional development.

What can you expect to learn:-

- Recapping some of the important MS Excel Skills needed to capture and prepare your data correctly for more advanced analysis
- Learning to design high-quality spreadsheets with data laid out and listed intelligently and usefully
- Using Excel to automate What-If Analysis and Forecast Sheets to "predict the future" to assist in making informed business decisions
- Discovering some key MS Excel functions you did not know about that will enhance your ability to perform data manipulation and automate your day-to-day tasks
- Understanding the fuss about PivotTables – Using these to rapidly summarise large amounts of data into easy -to-read and export reports you can use to inform your managers and colleagues
- Incorporating "SparkLines" into your PivotTables to showcase data trends such as Sales fluctuations, increased Marketing ROI or decreasing suppliers costs



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- Uncovering some amazingly powerful shortcuts that can help you navigate around complex spreadsheets, many of which can be used across the entire MS Office suite of programmes

A Look at the Key MS Excel Skills you Need to Master:

Recapping Key MS Excel Skills

- Customising the Microsoft Excel Screen
- Creating Multiple Views to make your Worksheets easier to read
- Working with Multiple Workbooks and Worksheets to help you manipulate data
- Setting up MS Excel Options to suit your needs
- Recapping Printing and Page Setup Working with Formulas to Make Tedious Task More Efficient
  - Understanding how Formulas are constructed
  - Creating and Copying Formulas across cells
- Assigning Absolute References to Formulas
- Defining and working with 3-D Formulas
- Using Formula-Auditing tools to track down errors
- Understanding and Correcting Common Formula Errors while you work
- Introducing the MS Excel Conditional Formatting to Highlight the Most Important Data
- Introducing the Conditional Formatting options that you have available
- Using Conditional Formatting to better analyse your data
  - Creating Charts to Showcase Data in a Visually Appealing Way
- Creating attractive and effective charts
- Understanding the terminology used to describe Chart Objects
  - Identifying the best chart for your data
- Creating attractive and effective charts
- Understanding the terminology used to describe Chart Objects
- Working with Data Quickly and Efficiently
- Sorting Data to make it easily manageable
- Subtotalling Data quickly and easily



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- Filtering Data so that you see only what you want to see
- Using What-If Data Analysis to Project Various Business Outcomes
- Using What-If Analysis to run different scenarios across formulas • Understanding the different What-If analysis tools: Scenarios, Data Tables and Goal Seek
- Creating scenarios to consider the impact of different variables
- Utilising Scenario Summary to view the results
- Getting the most out of Forecast Sheets Utilising Data Validation to Prevent Spreadsheet Errors
- Using Data Validation to ensure your workbooks are accurate and consistent
- Defining Data Validation rules
- Understanding the various Data Validation options
- Implementing Data Validation with custom formulas
- Adding Data Validation through the use of a simple drop down menu
- Creating Functional Macros to Automate Repetitive Tasks
- Automating lengthy or frequently performed tasks using Macros
- Learning how to record Macros to make the process simpler Make Working With Formulas & Functions Your Bread and Butter: Making Your Spreadsheets User-Friendly
- Using Data Consolidation Tools to make your sheets presentable and user-friendly
- Understanding how to use Conditional Formatting to visually analyse data, detect critical issues and identify patterns and trends
- Protecting your workbooks to prevent users from editing, overwriting, moving or deleting important data
- Identifying important tools for Managing and Preparing your data Building Basic Functions to Improve Your Efficiency
- Learning how to use Text Functions to enable you to better work with text strings
- Learning to build stand-alone logical IF functions, and making them more complex by nesting AND and OR within them
- Understanding the essential Statistical and Mathematical functions
- Examining how the Date and Time functions work



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- Using VLOOKUP to cross reference between different data sets
- Creating and updating external links, and discussing what the potential dangers are
- PivotTables: Understanding PivotTables and What They can do for you
- Why use a PivotTable?
- Understanding the Concept and Layout options
- Creating a PivotTable Report
- Working with fields in the PivotTable Learning the Basics of Building and Formatting a PivotTable
- Preparing your PivotTable Source Data
- Understanding the variety of style options available in the Design Tab
- Working with Fields and Field Settings
- Creating calculated items and calculated fields, as well as adjusting their order, editing and deleting them Working with Your PivotTable to Create Easy-to-Read Reports
- Introducing the various ways in which you can sort your data
- Identifying the variety of filter options that are available, from value filters to slicers
- Consolidating multiple worksheets into one PivotTable report
- Examining the Data Consolidation options you have available Using PivotCharts and Sparklines to Identify Trends
- Introducing PivotChart terminology
- Understanding the difference and similarities between PivotCharts and Regular Charts
- Using Sparklines to show data trends
- Creating and editing Sparklines Analysing External Data Using PivotTables
- Connecting to an External Data Source to create a PivotTable or PivotChart • Updating Data in your PivotTable
- Automatically Refreshing your PivotTable Discovering Exciting Additional Features Available in MS Excel
- Using the QuickExplore feature to drill into PivotTable data
- Utilising Hyperlinks to quickly access related information