

Intermediate Excel

£600 6 hours + venue costs if not at client office

Max 6 per group

Learning Objectives

Participants will be able to:

- Analyse and organise data effectively.
- Use logical, text, date, and lookup functions confidently.
- Work with Excel Tables, data validation, and conditional formatting.
- Create clear reports, charts, dashboards, and PivotTables.

Module 1: Review of Excel Fundamentals (30 mins)

- Review key formulas and calculation essentials.
- Apply best practices for building reliable spreadsheets.
- Identify and avoid common Excel mistakes.

Module 2: Working with Tables (45 mins)

- Create Excel Tables to structure data more effectively.
- Apply table styles for clearer presentation.
- Use structured references in formulas.
- Sort and filter table data quickly.
- Add slicers and format

Module 3: Intermediate Functions (90 mins)

Logical Functions

- Use IF and IFS to create conditional calculations.
- Combine AND and OR with other formulas.
- Build logic into worksheets to reduce manual checking.

Text Functions

- Use LEFT, RIGHT, and MID to extract text from cells.
- Join text together using CONCAT and TEXTJOIN.
- Clean and reshape data for reporting.

Date Functions

- Use TODAY and NOW to work with live dates and times.
- Calculate date differences using DATEDIF.
- Find month-end dates with EOMONTH.

Module 4: Lookup Functions (75 mins)

- Use XLOOKUP to find information more flexibly.
- Review VLOOKUP and HLOOKUP for common lookup tasks.
- Combine INDEX and MATCH for more advanced lookups.
- Handle lookup errors cleanly and professionally.

Module 5: Data Validation & Conditional Formatting (45 mins)

- Create drop-down lists to make data entry easier.
- Apply input controls to improve data accuracy.
- Build conditional formatting rules to highlight key information.
- Spot trends, exceptions, and outliers more quickly.

Module 6: Charts & Reporting (45 mins)

- Format charts so they are clear, professional, and easy to read.
- Create combo charts for more detailed reporting.
- Understand the basics of dynamic charts.
- Apply simple design principles to improve reports and dashboards.

Module 7: Introduction to PivotTables (60 mins)

- Create PivotTables to summarise larger data sets.
- Group data to make summaries easier to understand.
- Filter and slice data to focus on key information.
- Create basic PivotCharts to visualise summaries.

Practical Exercise

Build a sales performance dashboard using:

- Use Tables to organise and structure sales data.
- Use XLOOKUP to pull key information into the dashboard.
- Apply conditional formatting to highlight performance trends.
- Build PivotTables and charts to summarise results clearly.