

SKILLS WORKSHOP

Excel for Everyday Analysis

Formulas, pivots and charts you will actually use

FACILITATOR

Trainer Name

DURATION

Half day

AUDIENCE

Office and finance teams



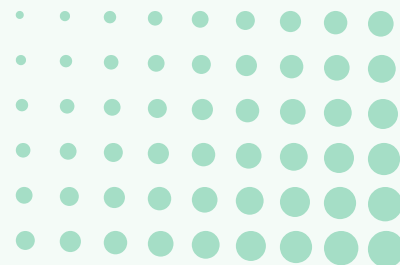
Agenda

01 Introduction

02 Core skills

03 Practice

04 Apply



SECTION 01

INTRODUCTION

**Twenty functions cover
ninety per cent of everyday
spreadsheet work.**

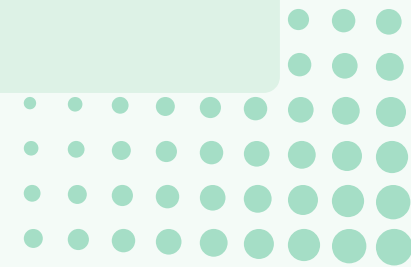
Why this workshop

What you will learn

- Clean data quickly
- Use lookups and conditional formulas
- Summarise with pivot tables
- Build clear, honest charts

GROUND RULE

**Bring a laptop with
Excel or Google
Sheets.**



The case for change

20

functions cover most
daily work

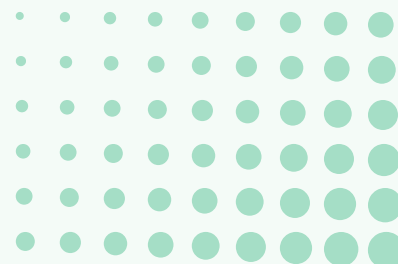
5 min

to build a pivot table

3 h

saved weekly by
automating reports

Illustrative figures for discussion.



SECTION 02

CORE SKILLS

Must-know formulas



SUMIFS / COUNTIFS

Totals and counts with conditions.



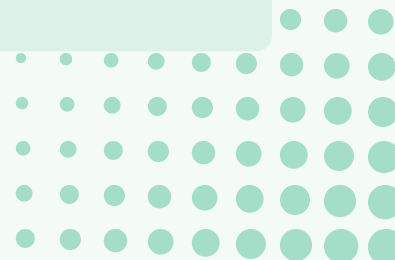
XLOOKUP

Find values across tables.



IF / IFS

Logic and categories.



From raw data to insight



Clean

Trim, split, de-duplicate



Structure

Convert to a table



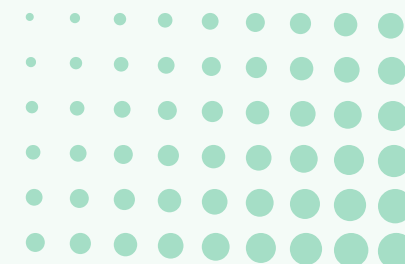
Summarise

Pivot by the right fields



Show

Chart one key message



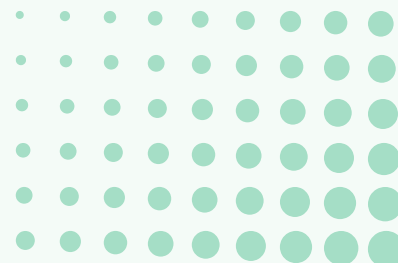
Do this, not that

Do

- ✓ Keep raw data on its own sheet
- ✓ Use tables and named ranges
- ✓ Label every chart axis

Avoid

- Merged cells in data
- Hard-coded numbers in formulas
- 3D pie charts



SECTION 03

PRACTICE

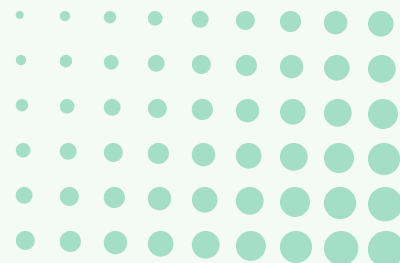
Try it: Build a sales dashboard



Activity photo / worksheet

Turn 500 rows of sample sales data into a one-page summary.

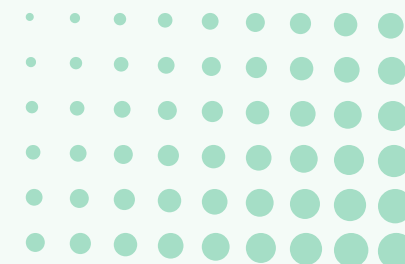
Clean the data, build two pivots (by region and by month) and one chart. Present your dashboard in two minutes.



Practice checklist

Step	What good looks like	Self-check
Data	Formatted as a table	☐
Formulas	No hard-coded values	☐
Pivot	Totals reconcile	☐
Chart	Title, labels, one message	☐

Tick each item during the practice round.



Workshop agenda

10:00

Warm-up

Spreadsheet habits



10:30

Module 1

Formulas



11:45

Module 2

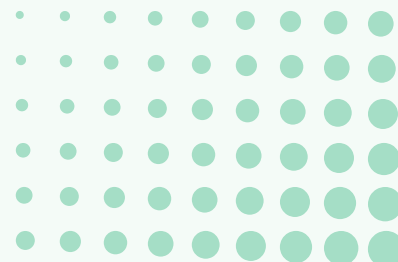
Pivots and charts



13:00

Practice

Dashboard build





A good spreadsheet answers a
question before anyone asks it.

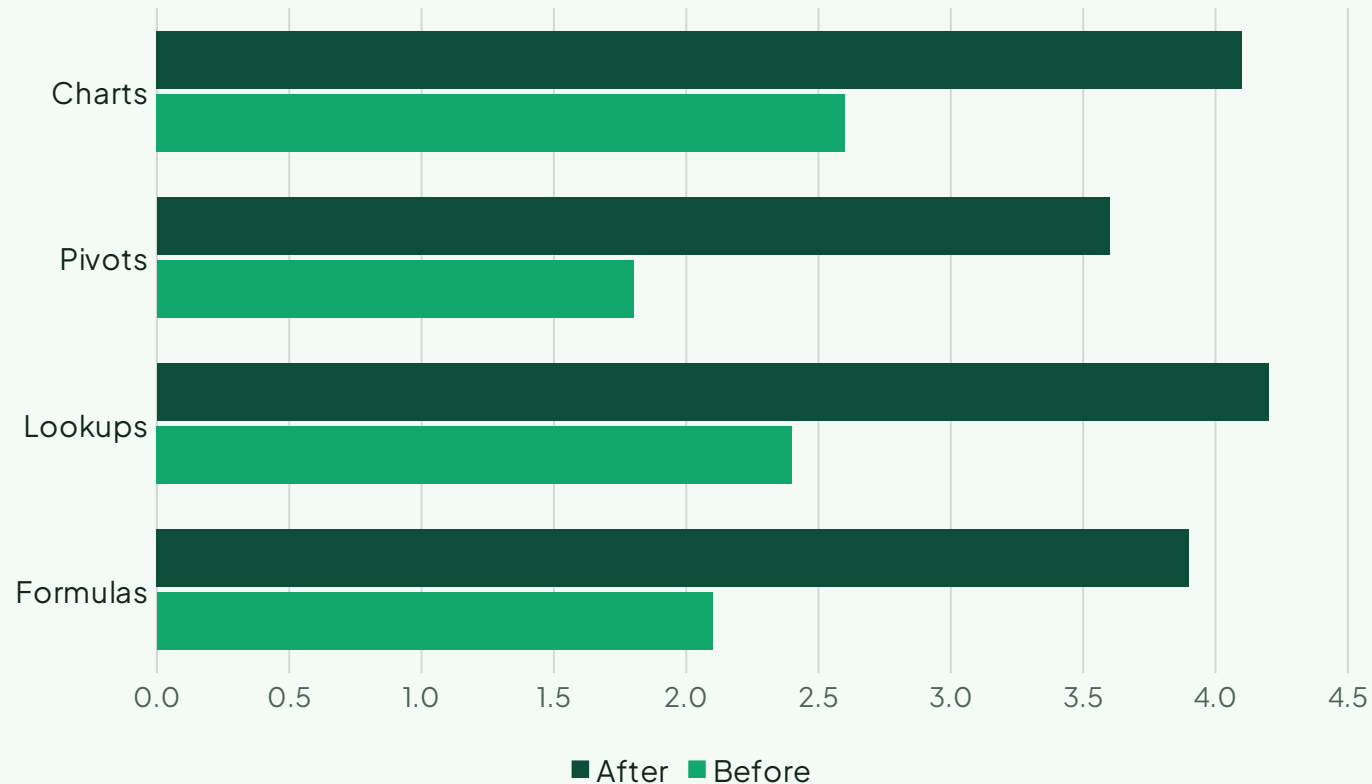
— Workshop facilitator

SECTION 04

APPLY

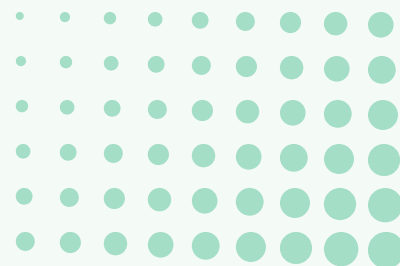
RESULTS

Confidence before and after



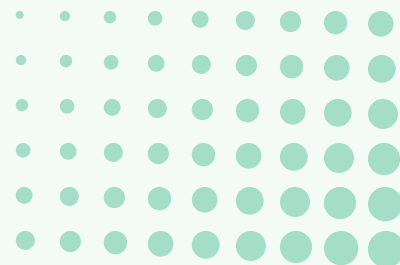
Self-rated confidence on a 5-point scale (sample data).

Sample data for illustration — replace with your own figures.



Key takeaways

- Clean data first
- Tables, not ranges
- Pivot to summarise
- One chart, one message



Now go and practise

Questions, feedback and next steps.

Trainer Name · training@yourdomain.in