

EXCEL FOR EVERYDAY ANALYSIS

Formulas, pivots and charts you will actually use

Trainer Name · Half day · Office and finance teams



AGENDA

01

Introduction

02

Core skills

03

Practice

04

Apply



INTRODUCTION

01

KEY IDEA

**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.



CORE SKILLS

02



MUST-KNOW FORMULAS

01

SUMIFS / COUNTIFS

Totals and counts with conditions.

02

XLOOKUP

Find values across tables.

03

IF / IFS

Logic and categories.



FROM RAW DATA TO INSIGHT

01

Clean

Trim, split, de-duplicate

02

Structure

Convert to a table

03

Summarise

Pivot by the right fields

04

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



PRACTICE

03



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



Portrait image

“

*A good spreadsheet answers
a question before anyone
asks it.*

— Workshop facilitator

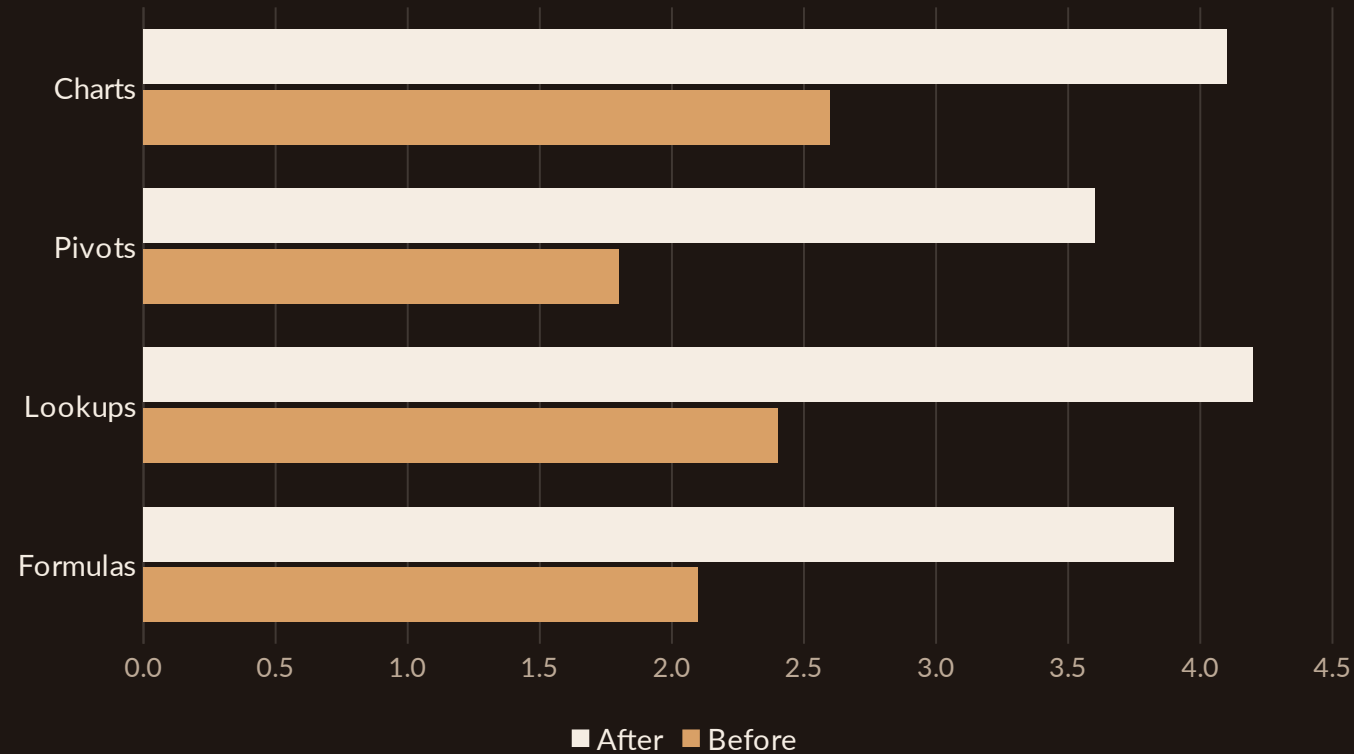


APPLY

04



CONFIDENCE BEFORE AND AFTER



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

Sample data for illustration — replace with your own figures.



YOUR 30-DAY ACTION PLAN

01

Week 1

Replace one manual report with a pivot.

02

Week 2

Use XLOOKUP on real data.

03

Week 3-4

Build a team dashboard.



KEY TAKEAWAYS

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

NOW GO AND PRACTISE

Questions, feedback and next steps.

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