

Excel with AI for Sales, Administrative & Accounts Staff

Duration : 16 Hrs (4 hours per day)

Day 1 – Excel Fundamentals

Module 1: Managing and Organizing Data

- Removing duplicates
- Data validation and drop-down lists
- Preparing clean and structured datasets

Module 2: Essential Formulas and Functions

- Understanding formulas and cell references
- Relative, absolute, and mixed references
- COUNT and COUNTA
- IF statements and logical functions
- Working with date and text functions

Module 3: Reporting and Data Visualization

- Conditional Formatting
- Highlighting important information
- Creating charts and graphs
- Understanding report layouts
- Preparing business reports and summaries

Day 2 – Working with Data Across Multiple Sources

Module 4: Working with Multiple Worksheets and Workbooks

- Managing multiple worksheets efficiently
- Referencing cells and ranges across worksheets
- Linking data between workbooks
- Consolidating data from multiple worksheets
- Organizing and managing large workbooks

Module 5: Lookup Functions and Formula Auditing

- Understanding lookup concepts
- Using VLOOKUP and XLOOKUP
- Retrieving and matching records
- Formula auditing techniques
- Tracing precedents and dependents
- Monitoring calculations using the Watch Window

Module 6: PivotTables and PivotCharts

- Creating PivotTables
- Summarizing large datasets
- Grouping and filtering PivotTable data
- Calculated fields and custom calculations
- Creating PivotCharts
- Interactive analysis using slicers and timelines
- Sales, administrative, and accounts reporting examples

Module 7: Creating Interactive Dashboards

- Dashboard design principles
- KPI cards and summary metrics
- Using PivotTables as dashboard sources
- Interactive filtering with slicers
- Dynamic charts and reports
- Building a business performance dashboard
- Dashboard best practices

Module 8: Working with External Data

- Importing CSV files
- Refreshing and updating imported data
- Combining data from multiple sources

- Preparing data for reporting and analysis
- Data management best practices

Day 3 – Automation, Protection and Forecasting

Module 9: Sharing and Protecting Workbooks

- Collaborating on workbooks
- Workbook and worksheet protection
- Protecting formulas and sensitive information
- Managing workbook access levels
- Best practices for file sharing

Module 10: Automating Workbook Functionality

- Creating validation rules and lists
- Identifying invalid data entries
- Detecting formula errors
- Recording and running macros
- Automating repetitive business tasks

Module 11: Forecasting and What-If Analysis

- Introduction to forecasting concepts
- Data Tables
- Scenario Manager
- Goal Seek
- Forecast Sheets
- Trend analysis and business planning

Day 4 – AI-Enabled Productivity and Business Applications

Module 12: Sparklines and Advanced Data Visualization

- Creating Sparklines
- Visualizing trends and performance
- Comparing data across periods
- Introduction to Map Charts
- Presenting insights effectively

Module 13: AI for Workplace Productivity

- Introduction to Generative AI
- Understanding AI opportunities and limitations
- Writing effective prompts
- Prompting techniques for business users
- Using AI to summarize, analyze, and organize information
- Generating Excel formulas with AI assistance

Module 14: Using Claude for Business Applications

- Introduction to Claude
- Drafting professional emails and communications
- Creating meeting notes and action items
- Summarizing reports and documents
- Analyzing business data using natural language prompts
- Creating report narratives and executive summaries
- Practical sales, administrative, and accounts use cases