

Course Name : MICROSOFT EXCEL – INTERMEDIATE DATA MANAGEMENT AND ANALYSIS
Duration : 2 days (Physical classroom / Virtual live instructor)
Skill Level : Intermediate

COURSE DESCRIPTION:

This two-day intermediate Microsoft Excel course is designed for professionals who already use Excel in their daily work and require stronger capabilities in data management, formulas, and analysis. The program focuses on practical, business-oriented use of Excel to support reporting, decision-making, and operational efficiency. The course begins with best practices for workbook organization and structured data design, followed by intermediate logical, lookup, conditional, text, and date functions commonly used in corporate environments. Participants then progress into data analysis techniques using sorting, filtering, Subtotals, and PivotTables, before learning how to create simple dashboards and perform basic what-if analysis. By the end of the course, participants will be able to confidently manage larger datasets, analyze information efficiently, and present insights clearly using Excel tools that are directly applicable to finance, HR, sales, marketing, and operations functions.

WHAT WILL YOU LEARN?

- Organize and maintain structured, multi-sheet Excel workbooks using Tables and clean data layouts.
- Apply intermediate formulas such as IF, nested IF or IFS, AND, OR, SUMIFS, AVERAGEIFS, COUNTIFS, and IFERROR for business calculations.
- Use lookup functions including VLOOKUP or XLOOKUP and INDEX/MATCH to retrieve information from master reference tables.
- Clean, standardize, and prepare datasets using text and date functions, as well as Conditional Formatting.
- Analyze large datasets efficiently using sorting, filtering, Subtotals, and PivotTables.
- Create basic dashboards using PivotTables, PivotCharts, and slicers, and perform simple what-if analysis using Goal Seek and Scenario Manager.

PREREQUISITE:

This course is suitable for participants with basic Excel knowledge, including creating and saving workbooks, basic formatting, simple formulas such as SUM and AVERAGE, and basic chart usage. No programming or VBA experience is required.

METHODOLOGY:

This program will be conducted using interactive lectures, live demonstrations, discussions, and hands-on practical exercises. The course can be delivered in a physical classroom or online.

JOB SCOPE:

This training enhances productivity and reporting capability for roles such as:

- Finance Manager / Accounts Executive
- Business Analyst
- Data Analyst
- HR / Administrative Executive • Sales Manager / Sales Executive
- Registrar
- Finance or Accounts Officer

MODULE 1: WORKING WITH EXCEL WORKBOOKS AND DATA STRUCTURES

- Welcome
- Course Overview
- Managing multi-sheet workbooks effectively
- Best practices for worksheet naming, layout, and organization
- Creating and using Excel Tables
- Structured references, AutoFilter, and Total Row
- Basic data cleanup and preparation

MODULE 2: CELL REFERENCES, NAMED RANGES, AND DATA VALIDATION

- Relative, absolute, and mixed cell references
- Creating and managing named ranges
- Data Validation for controlled data entry
- Drop-down lists, input messages, and error alerts

MODULE 3: CONDITIONAL AND AGGREGATION FORMULAS

- Logical functions: IF, nested IF, IFS, AND, OR
- Conditional calculations using SUMIF, SUMIFS, AVERAGEIFS, COUNTIFS
- Error handling with IFERROR and ISERROR
- Business use cases such as commissions, bonuses, and overtime calculations

MODULE 4: LOOKUP AND REFERENCE FUNCTIONS

- Purpose and use of lookup functions
- VLOOKUP and XLOOKUP syntax and best practices
- INDEX and MATCH for flexible lookups
- Linking transaction data to master reference tables

MODULE 4: DATES, TEXT FUNCTIONS, AND CONDITIONAL FORMATTING

- Date functions for reporting and scheduling
- Text functions for cleaning and standardizing data
- Conditional Formatting for trends, exceptions, and highlights
- Practical data-cleaning scenarios

MODULE 5: SORTING, FILTERING, AND SUBTOTALS

- Multi-level and custom sorting
- AutoFilter and Custom Filter techniques
- Using Subtotals for grouped summaries
- Ad-hoc analysis from large datasets

MODULE 6: PIVOTTABLES FOR DATA ANALYSIS

- Multi-level and custom sorting
- AutoFilter and Custom Filter techniques
- Using Subtotals for grouped summaries
- Ad-hoc analysis from large datasets

MODULE 7: PIVOTTABLES FOR DATA ANALYSIS

- Creating PivotTables from structured data
- Configuring rows, columns, values, and filters
- Grouping data by date and numeric ranges
- Producing multi-dimensional summaries

MODULE 8: PIVOTCHARTS AND DASHBOARDS

- Creating PivotCharts from PivotTables
- Formatting charts for clarity and presentation
- Using slicers and timelines for interactivity
- Building simple Excel dashboards

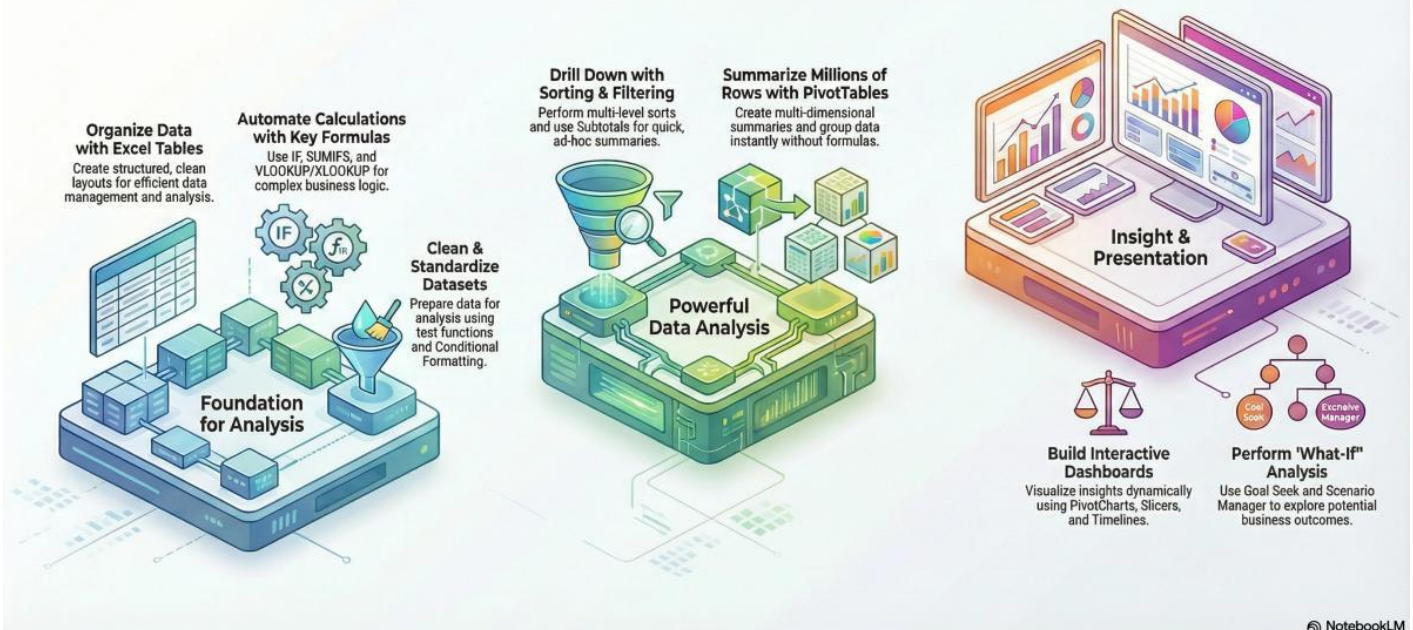
MODULE 9: WHAT-IF ANALYSIS

- Using Goal Seek for target-based calculations
- Scenario Manager for comparing alternatives
- Introduction to sensitivity analysis concepts

CONCLUSION

- Review of key concepts and best practices
- Q&A session
- Useful references and further learning resources
- Participant feedback

Level Up Your Data Skills: The Intermediate Excel Journey



LEVEL UP YOUR EXCEL SKILLS: FROM DATA TO DASHBOARD

COURSE SNAPSHOT

DEFINITION
Course: Microsoft Excel – Intermediate Data Management and Analysis. A program focused on practical, business-oriented use of Excel to support reporting and decision-making.

STATISTIC
2-Day Intensive Training. Available as a physical classroom course or a virtual live instructor-led session.

DEFINITION
Intermediate Skill Level. Perfect for users with basic Excel knowledge looking to build stronger capabilities.

IS THIS COURSE FOR YOU?

PREREQUISITE
Required Foundation. You should be comfortable with creating workbooks, basic formatting, and simple formulas like SUM and AVERAGE.

CATEGORY
Ideal for Roles In: Finance, Accounting, Business Analysis, Data Analysis, HR, Administration, Sales, Marketing, Operations, and Reporting (MIS).

YOUR LEARNING JOURNEY: FROM DATA ORGANIZATION TO INSIGHTFUL ANALYSIS

Phase 1: Foundations & Formulas

Learn to structure data professionally and build powerful formulas for complex business logic.

Phase 2: Data Retrieval & Preparation

Master lookup functions to link datasets and use text/date functions to clean and standardize your information.

Phase 3: Analysis & Summarization

Dive into large datasets using sorting, filtering, and Subtotals, then master PivotTables for multi-dimensional summaries.

Phase 4: Visualization & Exploration

Transform your analysis into basic interactive dashboards and perform what-if analysis to compare business scenarios.

CORE SKILLS YOU WILL MASTER

- Data Structuring (Module 1-2).** Organize multi-sheet workbooks, use Excel Tables with structured references, and control data entry with Data Validation.
- Conditional Formulas (Module 3).** Apply logical functions like IF, IFS, AND, OR and conditional aggregations like SUMIFS, COUNTIFS, AVERAGEIFS.
- Lookup Functions (Module 4).** Retrieve information efficiently from reference tables using VLOOKUP, XLOOKUP, and INDEX/MATCH.
- Data Cleaning (Module 5).** Standardize datasets with text and data functions and highlight key information using Conditional Formatting.
- Ad-Hoc Analysis (Module 6).** Analyze large datasets with multi-level sorting, custom filters, and grouped summaries using Subtotals.
- PivotTables & Dashboards (Module 7-8).** Create PivotTables, group data, and build simple dashboards with PivotCharts, Slicers, and Timelines.
- What-If Analysis (Module 9).** Use Goal Seek for target-based calculations and Scenario Manager to compare business alternatives.

BY THE END OF THE COURSE, YOU WILL...

- Confidently Manage Large Datasets**
Organize and maintain structured, multi-sheet workbooks with clean data layouts.
- Analyze Information Efficiently**
Use PivotTables, Subtotals, and advanced filters to quickly derive meaning from data.
- Present Insights Clearly**
Create basic dashboards with charts and slicers to communicate findings effectively.