

# Excel Formulas & Functions

*From SUM to XLOOKUP — modern Excel functions in one day.*

## ◆ THIS CLASS AT A GLANCE

You know your way around Excel. Now it is time to write the formulas that turn a working spreadsheet into a powerful one — cleanly, accurately, and with the modern functions that replace yesterday's workarounds.

- Master Range Names and Excel Tables for dynamic, self-documenting formulas
- Calculate dates, ages and deadlines with NOW, TODAY, DATE, YEAR, DAYS
- Slice and combine text with TEXTBEFORE, TEXTAFTER, TEXTSPLIT, CONCAT and TRIM
- Make Excel decide for you: IF, IFS, AND, OR, SWITCH and nested logic
- Crunch data conditionally with COUNTIFS, SUMIFS, AVERAGEIFS
- Replace VLOOKUP for good with XLOOKUP

## Excel Formulas & Functions

### C O U R S E O V E R V I E W

If you have ever copied a formula and watched it break, written a nested IF you could barely read a week later, or wished there was a cleaner alternative to VLOOKUP — this class is for you.

You will spend the day writing real formulas against real datasets, building the modern toolkit Excel offers in 2026 and the habits that make complex formulas easy to read and easy to maintain.

#### HOW WE TEACH

Your instructor is a working Excel professional, not a presenter reading from slides.

Public classes have up to 6 students for maximum individual attention. Private team training scales to fit your group, however large.

Every concept is taught, then immediately practiced. You leave with the muscle memory, not just the notes.

#### WHO SHOULD ATTEND

Users with a strong Excel foundation who want to level up specifically in formulas and functions.

Self-taught users whose formula knowledge is dated and who want to learn modern Excel.

Anyone who has completed our Excel Introduction class and is ready for the next step.

Teams who need everyone writing formulas the same clear, maintainable way.

#### WHAT YOU TAKE HOME

- Printed class binder with step-by-step labs and challenge exercises.
- Microsoft Excel exercise files — 1-year access included.
- Double-sided laminated keyboard shortcut guide.
- Certificate of completion plus 8 CPE credits (TSBPA accredited).

#### C L A S S E S S E N T I A L S

**Level:** Intermediate

**Format:** In-person classroom or live online (always a live instructor)

**Duration:** 8 hours — 9:15 AM to 5:00 PM

**Tuition:** \$425 · includes all materials

**Locations:** Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver · Live Online

**Credits:** 8 CPE credits — accredited through the Texas State Board of Public Accountancy

# Excel Formulas & Functions

## PROGRAM AGENDA — DETAILED COURSE OUTLINE

### PROGRAM AGENDA

#### 1. Excel Tables

- **Tables overview:** why an Excel Table beats a styled range
- **Structured cell references:** the [@Column] syntax explained
- **Table styles & options:** headers, totals, banded rows, slicers
- **Maintenance:** removing duplicates and converting tables back to ranges

#### 2. Range Names

- **Range Names overview:** what they are and why they matter
- **Creating names:** single names and bulk creation from headers
- **Navigating & managing:** Name Box, Name Manager and best practices
- **Using names in formulas:** writing formulas you can read a year later

#### 3. Functions Foundation

- **Functions vs. formulas:** knowing when to use which
- **Why use functions:** readability, accuracy and re-use
- **Function syntax:** name, parentheses, arguments and AutoComplete

#### 4. Date & Time Functions

- **NOW & TODAY:** current timestamp and current date
- **YEAR, MONTH, DATE:** extracting and building date values
- **DAYS:** calculating differences between dates

#### 5. Statistical Functions

- **SUM, AVERAGE, MEDIAN:** core aggregators every analyst needs
- **MIN, MAX:** finding extremes in a dataset
- **COUNT, COUNTA, COUNTBLANK:** what each one really counts

#### 6. Text Functions

- **CONCAT, TEXTJOIN:** combining text the modern way
- **UPPER, LOWER, PROPER, TRIM:** cleaning up messy text
- **LEFT, RIGHT, MID, LEN:** extracting parts of strings
- **FIND, SUBSTITUTE:** locating and replacing within text
- **TEXTBEFORE, TEXTAFTER, TEXTSPLIT:** the new generation of text tools

#### 7. Logical Functions

- **IF, IFS, nested IFs:** single and multi-condition decisions
- **AND, OR, SWITCH:** combining and routing decisions
- **COUNTIF, COUNTIFS:** counting with conditions
- **SUMIF, SUMIFS:** summing with conditions
- **AVERAGEIF, AVERAGEIFS:** averaging with conditions

#### 8. Lookup Functions

- **XLOOKUP:** the modern replacement for VLOOKUP and HLOOKUP
- **VLOOKUP:** how to read, repair and replace legacy VLOOKUPs

#### 9. Flash Fill

- **Using Flash Fill:** pattern-based fills without writing formulas
- **Troubleshooting:** when Flash Fill helps and when it does not
- **Limitations:** knowing when to reach for a formula instead



## A L T E R T O Y O U R M A N A G E R

Use this template to request approval. Customize the bracketed parts and send.

Dear [Manager's Name],

I would like to request approval to attend the Excel Formulas and Functions class offered by Excel Experts. It is a one-day, hands-on class that will modernize how I work with formulas — exactly what I need to work faster and more accurately on [team / project / report name].

### What I'll bring back to the team

- **Modern formulas** — XLOOKUP, IFS, SUMIFS and the text functions every analyst should know.
- **Cleaner, faster workbooks** — Excel Tables and Range Names that make formulas readable and maintainable.
- **Conditional analysis on demand** — COUNTIFS, SUMIFS, AVERAGEIFS for ad-hoc reporting in seconds.
- **Decision logic that scales** — IF, IFS, AND, OR, SWITCH for any business rule the team needs.
- **A library of patterns** — I can use and teach to the rest of the team.

### Why this class specifically

- **One full day** — no multi-week commitment; minimal disruption to my workload.
- **Taught by a working Excel professional** — not a recorded video or a generic presenter.
- **Small public classes (up to 6 students)** — or live online if travel is a concern; private team training is also available.
- **8 CPE credits included** — accredited through the Texas State Board of Public Accountancy.
- **Locally available** — Dallas-Fort Worth, Houston, Austin, Oklahoma City, Denver, or live online.

### The investment

- **Tuition:** \$425
- **Time out of office:** 1 business day
- **Included materials:** printed class binder, Excel exercise files (1-year access), laminated shortcut guide, certificate of completion

I expect to recover the time investment within the first few weeks just by working more efficiently in Excel — and I will be able to share what I learn with the rest of the team.

Class details and online registration: [dfwexcel.com/microsoft-excel-formulas-and-functions-class/](https://dfwexcel.com/microsoft-excel-formulas-and-functions-class/)

Questions: 817-841-9560

Thank you for considering this. I would appreciate your approval to enroll.

Sincerely,

[Your Name]

## REGISTRATION

### Enroll Today!

**Online:** [dfwexcel.com](https://dfwexcel.com)

**Phone:** 817-841-9560

**Price:** \$425

**Format:** In-person classroom or live online

**Cities:** Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver

## TRAIN YOUR TEAM

### Bring Excel Experts to your office:

- Private group training on your schedule
- Tailored to your team's industry and data
- On-site, at our classrooms, or virtual
- 1-on-1 coaching also available

[dfwexcel.com/excel-experts-train-your-team/](https://dfwexcel.com/excel-experts-train-your-team/)