

Microsoft Excel[®]

Introduction

One day. Real skills. From zero to confident.

◆ THIS CLASS AT A GLANCE

Brand-new to Excel? Self-taught and missing the basics? In one focused day, you will go from staring at a blank workbook to building professional, well-formatted spreadsheets you can actually rely on at work.

- Navigate the Excel interface confidently — ribbon, tabs, views, shortcuts
- Build clean, well-formatted spreadsheets the right way the first time
- Write your first formulas and functions: SUM, AVERAGE, IF, XLOOKUP
- Master relative and absolute cell references — and stop breaking formulas
- Create your first Pivot Table and slice your data in seconds
- Build clear charts and prepare polished pages for printing



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

Excel can feel overwhelming when nobody has ever shown you the right way to use it. In one day with a real instructor at your side, you will build the rock-solid foundation every later Excel skill is built on.

You will not watch a video. You will work in Excel — guided exercises, real datasets, and immediate help the moment you get stuck.

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

Complete beginners who have never opened Excel and want to start the right way.

Self-taught users who get the job done but suspect they are working harder than they need to.

New hires being onboarded into a spreadsheet-heavy role.

Teams who need a consistent baseline of Excel skill across the office.

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

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

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PROGRAM AGENDA — DETAILED COURSE OUTLINE

1. Getting Started in Excel

- **Excel environment:** title bar, ribbon and ribbon tabs, Quick Access Toolbar
- **Worksheet views:** Normal, Page Layout and Page Break Preview
- **Backstage view:** New, Open, Save As, Print, Options
- **Keyboard shortcuts:** essential shortcuts, navigation, scrolling, undo and redo

2. Cell Basics

- **Understanding cells:** what a cell really is and how Excel addresses it
- **Selecting cells:** single cells, ranges, non-contiguous selections
- **Entering content:** text, numbers, dates and inserting cell content
- **Editing content:** deleting, cut and paste, drag and drop
- **Fill Handle:** completing series, copying formulas and patterns

3. Modifying Columns, Rows, and Cells

- **Sizing:** changing column width and row height the precise way
- **Structure:** inserting and deleting columns and rows
- **Visibility:** hiding and showing columns and rows
- **Text display:** wrapping cell text and merging cells correctly

4. Formatting Cells

- **Typography:** font type, size, color and decorations (bold, italic, underline)
- **Visual treatment:** cell borders, fill colors and quick cell styles
- **Alignment:** horizontal and vertical alignment, indenting, orientation

5. Cell Formats

- **Number formats:** general, number, currency, accounting
- **Percentage formats:** decimals, rounding behavior, common gotchas
- **Date formats:** short date, long date, custom date formats

6. Tables

- **Tables overview:** why an Excel Table is more than just a styled range
- **Creating tables:** converting a range, choosing headers, naming the table
- **Working with data:** adding and removing data; auto-expanding ranges

7. Pivot Tables

- **Pivot Tables overview:** what a Pivot Table is and when to reach for one
- **Creating Pivot Tables:** from a range or a Table, choosing the layout
- **How Pivot Tables work:** rows, columns, values and filters explained
- **Slicing and dicing:** drilling, summarizing, switching the question you ask

8. Page Layout and Printing

- **Print pane:** previewing exactly what will print
- **Print area:** setting, clearing and updating the print area
- **Page orientation:** portrait vs. landscape and scaling to fit
- **Page breaks:** viewing, inserting and adjusting page breaks

9. Intro to Formulas

- **Formulas overview:** what a formula is and how Excel evaluates it
- **Math operators:** +, -, *, /, ^ and order of operations
- **Cell references:** referring to other cells and ranges in a formula
- **Creating formulas:** writing your first formulas by hand
- **Copying formulas:** fill down, fill right and what changes vs. what stays

10. Relative & Absolute References

- **Relative references:** the default behavior and when it helps
- **Absolute references:** \$ signs, locking rows and columns, mixed references
- **Across worksheets:** referencing cells on other sheets reliably

11. Functions

- **Functions overview:** what a function is and how it differs from a formula
- **Parts of a function:** the name, parentheses and arguments
- **Function arguments:** required vs. optional arguments and reading syntax hints
- **Using functions:** typing, AutoComplete, and the Insert Function dialog
- **Function Library:** browsing categories on the Formulas tab

12. Statistical Functions

- **AutoSum:** the one-click shortcut for totals and quick stats
- **SUM, AVERAGE, MAX, MIN:** the core four every Excel user needs
- **COUNT vs. COUNTA:** what each one actually counts (and how to choose)

13. The IF Function

- **IF function overview:** letting Excel make decisions for you
- **IF arguments:** logical_test, value_if_true, value_if_false
- **Using IF in real workbooks:** common business examples and pitfalls

14. The XLOOKUP Function

- **XLOOKUP overview:** the modern replacement for VLOOKUP and HLOOKUP
- **XLOOKUP arguments:** lookup value, lookup array, return array and optional arguments
- **Using XLOOKUP:** pulling matching data across worksheets and tables

15. Charts

- **Charts overview:** picking the right chart type for the story you are telling
- **Chart components:** title, axes, legend, data labels, gridlines
- **Layout and styles:** professional layouts and color schemes



A L T E R N A T I V E 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 Introduction class offered by Excel Experts. It is a one-day, hands-on class designed to build a strong, practical Excel foundation — exactly what I need to work faster and more accurately in [team / project / report name].

What I'll bring back to the team

- **A real Excel foundation** — fewer mistakes, fewer interruptions to ask coworkers for help.
- **Clean, professional spreadsheets** — easier for the team to read, audit, and maintain.
- **Working knowledge of formulas** — SUM, AVERAGE, IF, XLOOKUP and the cell-reference rules behind them.
- **Pivot Tables on demand** — turning raw data into clear answers in seconds instead of hours.
- **Keyboard shortcuts and habits** — small efficiencies that compound into real time savings every week.

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:** one 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-introduction-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

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/