

ExecuTrain Course Outline

Excel for Sales Professionals

1147 v03

2 Days

Description

Business Development and Sales are the most important departments of an organization - they generate Revenues that sustains and grows an organization. From creating a distribution channel to quoting, shipping products, invoicing, collecting payments, etc, data is created. This data is stored, retrieved, used, and analyzed by Sales Professionals. Top Management, Marketing Professionals and Finance Team also use this data. This “domain-focused” course introduces various **techniques of Excel as used to manage information about Sales and Business Development**. It uses Intermediate to Advanced level skills in Excel.

The course achieves **two goals**:

1. How to organize **Sales** Data, and
2. How to use Excel to Record, Analyze, and Report “**Sales**” data

Excel Skills covered

- Customizing Excel (Custom Lists, Custom Sorting, Custom Range Names, Custom Views, Custom Reports)
- Advanced Printing Features
- Absolute and Mixed Formulas
- Advanced Formatting
- Conditional Formatting
- Data Validation using a Range Name
- Advanced Filtering
- Protecting Cells in a worksheet
- Shared Worksheets
- Functions & Formulas
- LOOKUP Function
- Pivot Tables
- Advanced Charting - Trend Analysis
- Marcos
- Workspace
- Importing and Exporting Data
- Creating Outlook Contact Book from Excel
- Useful Excel Tips, Tricks, and Short cuts.

The course **does not use** Excel Visual Basic and is totally non-technical.

Pre-requisites

Excel Beyond Basics course of ExecuTrain or equivalent knowledge.

Who Should Take This Course?

Sales Directors, Sales Managers, Business Development Managers, Sales Administrators, Sales Coordinators, etc.

Objectives

- ✓ Sales data - types, sources
- ✓ Distributor's / Channel Accounts List
- ✓ Channel Contact's lists
- ✓ Product Lists
- ✓ Price Lists
- ✓ Generating Quotes / Invoices
- ✓ Targets Vs Actuals: Sales, Collections
- ✓ Sales Data Analysis
- ✓ Reports - Daily, weekly, Monthly, Quarterly, Annual.
- ✓ Collections / Outstanding / Aging reports and analysis
- ✓ Macros for Standard Sales Processes
- ✓ Excel Tips

Outline

What's in This Course and What Isn't?

How to Use sales and related Data
Excel Makes Your Job Easy

EXCEL-lent Beginnings

Customizing Excel
Adding More Buttons to Your Toolbars
Tweaks in the Options Dialog
Changing Tab Color
Keeping Headings Visible
Printing Headings
Printing Only a Certain Range
Printing Headers and Footers
Copying a Worksheet
Showing Numbers in Thousands
Excel Text / Data to Speech
Compare two worksheets side by side

Excel - Must Know Advanced skills

Data Validation
Named Ranges
Linking Sheets
Workspace

Time-saving Tricks

Quickly Seeing Sum or Average
Adding Subtotals
Removing Subtotals
Adding a Second Level of Subtotals
Quickly Filling a Series

Macros to Automate Repetitive processes

Print Formatting Macros

Formulas

Entering Formulas
Calculation Operators
Order of Operations
Function Junction
Entering Functions from the Toolbar
Discovering New Functions
Using the Fill Handle to Copy a Formula
Seeing All Formulas
Using a Fixed Value in Your Formula
Replacing a Thousand Formulas with One

Disciplining Data

Importing Data
Text to Columns - Wizard Step 1
Wizard Step 2 for Delimited Files
Wizard Step 2 for Fixed Width Files
Step 3 of the Wizard
Looking up Data
Copying the VLOOKUP Formula to Get Region and District
Dealing with #N/A for Missing Values
When You Know There Is a Match but Excel Can Not Find It
Retrieving Many Columns from Lookup Range
Getting Good Records from Bad Data
VLOOKUPs Take a Long Time to Calculate

Quickly Sorting Your Data

Custom Sorts

Dealing with Dates

Converting Text That Looks Like a Date to a Real Date

Fiscal Responsibility (Fiscal Years NOT Ending On Dec 31)

Preparing Your Data: Joining Text

Turning Your Data on Its Side with Transpose

Counting Records

Breaking Apart Text

Analysis: Moving from Data to Information

Learning to Love Pivot Tables

Creating Your First Pivot Table

Changing the Pivot Table Using the Add To Button

Eliminating Blank Cells from the Data Section

Changing a Pivot Table by Dragging Fields

Showing Two or More Fields in the Data Area

Grouping Date Fields by Year

Grouping Date Fields by Month

Removing one of Many Data Items

Building an Ad-Hoc Report Using Page Fields

Showing Top 10 Customers

Drilling Down To See Detail

Pivot Tables and Recalculation

Limitations on Using Pivot Tables

Reporting Percentage of Row

Faster Pivot Tables

Using a Pivot Table to Generate a Unique List

Building Your Case: Presenting and Reporting Your Data

Making Reports Look Great

How to Wrap Text

Use Custom Views to Permanently Save Multiple Reports from Same Sheet

Chart Your Success

Creating a Chart with One Keystroke

Making the Chart Look Better

Use Pictures or Textures in a Chart

Comparing Models of Different Scales on the Same Chart

Pie Charts

Combo Charts

Charting with a Second Axis

Charting Trends

Measurement: Key to Sales Management

Using Metrics

Metrics - Quantitative

Calculating Compound Growth Rates