

KOENIG SOLUTIONS · COURSE OUTLINE

Advanced Excel Training Plan in 2 Days (Microsoft)

Learn to build advanced formulas, Pivot Tables, Power Query workflows, dashboards and macros in Microsoft Excel.

2 Days

8 HOURS A DAY

9

MODULES

38

TOPICS

Each day = 8 hours (including 2 breaks)

COURSE OVERVIEW

This course covers advanced Excel formulas and functions, including nested logical statements, text and date functions, and dynamic array formulas, along with data tools such as validation, deduplication and consolidation. It then moves into PivotTables, Pivot Charts and Power Query for building basic BI workflows. The second part covers Power Pivot and introductory DAX, interactive dashboard design with form controls and KPI indicators, advanced chart types, and macro recording with a simple VBA introduction. It closes with collaboration and efficiency techniques, including workbook protection, version tracking, named ranges and error handling.

WHO THIS COURSE IS FOR

Data Analysts

Financial Analysts

Business Analysts

Report Developers

Excel Power Users

PREREQUISITES

- Learners already have intermediate Excel knowledge.

TOOLS AND REQUIREMENTS

- Office 365 latest software
- Windows laptop or desktop

LEARNING OBJECTIVES

- Apply nested IF, IFS and SWITCH for conditional logic
- Construct dynamic array formulas such as FILTER, SORT and UNIQUE
- Configure data validation, text-to-columns and duplicate removal
- Build and customise PivotTables, Slicers and Pivot Charts
- Transform and load data using Power Query
- Develop data models and DAX measures in Power Pivot
- Design interactive dashboards with form controls and KPI indicators
- Automate tasks using macros and simple VBA subroutines

9 Modules, 38 Topics

DAY 1**Advanced Formulas, Data Tools, and Pivot Analysis****01****2.5 hours****Advanced Formulas & Functions****TOPICS**

- Nested IF, IFS, SWITCH
- **TEXT functions:** TEXT, LEFT, RIGHT, MID, CONCAT, TEXTJOIN
- DATE & TIME functions
- **Logical functions:** AND, OR, NOT
- INDIRECT, OFFSET, CHOOSE
- **Intro to dynamic array formulas:** SEQUENCE, FILTER, SORT, UNIQUE

02**1.5 hours****Data Tools****TOPICS**

Data Validation with custom rules · Text to Columns · Removing Duplicates · Grouping/Ungrouping · Consolidating Data from multiple sources

03**2 hours****Pivot Tables & Pivot Charts****TOPICS**

Creating and customizing PivotTables · Calculated Fields & Items · Grouping data (date/number/text) · Using Slicers and Timelines · Creating Pivot Charts

04**1.5 hours****Power Query - Basic BI Workflow****TOPICS**

Get & Transform basics · Data cleansing, merging, unpivoting · Loading to Excel/Pivot

DAY 2**Power Pivot, Dashboards, Automation & Collaboration****05****2 hours****Power Pivot & Intro to DAX****TOPICS**

Data Models & Relationships · **DAX Functions:** SUMX, CALCULATE, etc. · Creating insights using Power Pivot

06**2 hours**

Dashboards & Reporting

TOPICS

- Designing interactive dashboards
- Form Controls (sliders, checkboxes, dropdowns)
- Linking filters/charts to inputs
- Conditional formatting for visuals
- KPI indicators, combo/dynamic charts

07**1.5 hours**

Advanced Charts & Visualizations

TOPICS

Waterfall, Gantt, Thermometer, Gauge Charts · Sparklines · Dynamic charts and formatting tricks

08**1.5 hours**

Excel Automation

TOPICS

Macro Recorder + editing basics · Assigning macros to buttons/shapes · **Simple VBA intro:** subroutines, loops

09**1 hour**

Collaboration & Efficiency Hacks

TOPICS

Workbook/worksheet protection · Track changes, comments, version control · Named ranges, keyboard shortcuts · Error handling (IFERROR, ISNA, etc.) · Optimization tips for slow files

NOTES

Is 2 Days Enough?

- 2 Days is just enough for this training if: Learners already have intermediate Excel knowledge, each section is taught hands-on with guided examples, and practice files and exercises are shared in advance or as homework.
- If the learners are beginners or slow-paced, or if detailed business case projects are expected, you will need 3 days to allow: more practice time, revision exercises, and group tasks or project-based application.

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit koenig-solutions.com

✉ info@koenig-solutions.com