KOENIG SOLUTIONS · COURSE OUTLINE

Advanced Excel with Copilot for Managers

Learn to use advanced Excel functions, Power Query, Power Pivot, DAX and Copilot to build dashboards and support managerial decisions.

3 Days	10	55
24 HOURS	MODULES	TOPICS

COURSE OVERVIEW

In the modern data-driven business environment, managers are expected to make informed decisions using accurate, well-structured, and timely data insights. This Advanced Excel with Copilot course empowers professionals to go beyond traditional spreadsheet skills by integrating advanced Excel functions, Power Query, Power Pivot, and AI-powered features like Copilot. Participants will learn how to efficiently manage and transform large datasets, design dynamic dashboards, and use Excel's Copilot to generate insights, build formulas, and solve complex analytical problems faster.

WHO THIS COURSE IS FOR

This course is designed for:

- **Mid to Senior-Level Managers who rely on data for decision-making**
- **Business Analysts and Team Leads who prepare reports and dashboards**
- **Finance, Operations, HR, and Supply Chain Professionals managing complex datasets**
- **Department Heads seeking to integrate AI tools like Copilot into their workflow**
- **Anyone looking to move from intermediate to advanced Excel and AI-assisted analytics proficiency**

PREREQUISITES

- Participants should have a good working knowledge of Excel fundamentals (basic formulas, charts, and data handling). No programming background is required.

LEARNING OBJECTIVES

What You Will Learn

By the end of the program, managers will be able to:

- Use advanced Excel functions for data analysis and decision-making
- Clean, transform, and model data using Power Query and Power Pivot
- Design interactive dashboards to visualize key business metrics
- Leverage Excel Copilot and AI tools to enhance productivity and reporting accuracy
- Apply Excel as a strategic decision-support tool for managerial reporting

COURSE SYLLABUS

10 Modules, 55 Topics

DAY 1 Advanced Excel Functions & Decision-Making Tools

01

Logical & Analytical Excel Functions

TOPICS

- Understanding Excel's Role in Managerial Decision-Making
- Logical Functions (IF, AND, OR, IFS, SWITCH)
- **Conditional Aggregations:** SUMIF, SUMIFS, COUNTIF, COUNTIFS
- **Text Manipulation:** TEXTJOIN, CONCAT, LEFT, RIGHT, MID
- SUMPRODUCT & FILTER Functions for Complex Data Scenarios
- XLOOKUP vs. VLOOKUP - Smart Data Retrieval
- Using Dynamic Arrays and Spill Formulas for Efficiency

02

Data Organization & Validation

TOPICS

- Advanced Sorting & Custom Filters
- Creating Dropdowns with Data Validation
- Preventing Data Entry Errors Using Form Controls
- Conditional Formatting for Data Insights
- Using Color Scales, Icon Sets, and Custom Rules

03

Pivot Tables, Slicers & Dashboards

TOPICS

- Building Interactive Pivot Tables
- Using Slicers and Timelines for Dynamic Analysis
- Creating Summary Reports from Large Datasets
- Designing Dashboard Layouts with Managerial KPIs

DAY 2 Data Cleaning & Modelling with Power Excel

01

Introduction to Power Excel

TOPICS

When to Use Power Query vs. Power Pivot · Integrating Excel with Modern Data Workflows

02

Power Query - Data Cleaning & Transformation

TOPICS

- Getting Started with Power Query Editor
- Connecting to Various Data Sources (Files, Folders, Web, Databases)
- Basic to Advanced Transformations (Split, Merge, Replace, Append)
- Working with Text, Numbers, and Dates in Power Query
- Creating Conditional Columns & Index Columns
- Grouping, Aggregating, Pivoting & Unpivoting Data
- Best Practices for Clean Data Models

03

Power Pivot - Data Modelling & Relationships

TOPICS

- Introduction to Data Modelling Concepts
- Understanding the Excel Data Model
- Database Normalization & Relationship Management
- Creating and Managing Table Relationships
- Using Data vs. Diagram Views
- Understanding Relationship Cardinality (One-to-One, One-to-Many)

DAY 3 Building Dashboards & Leveraging Copilot

01

Creating Business Dashboards

TOPICS

- Linking Power Query + Power Pivot + Excel Charts
- Using Relational Data to Create Interactive Dashboards
- Building KPI-Driven Dashboards for Management Reports
- **Designing with Purpose:** Layouts, Color Coding & Storytelling
- **Real-Time Dashboards:** Updating and Refreshing Data

02

Introduction to DAX (Data Analysis Expressions)

TOPICS

- Overview of DAX and Its Role in Power Pivot
- Basic DAX Functions (CALCULATE, RELATED, SUMX, FILTER)
- Building Measures for Business Scenarios
- Using DAX for Financial, Sales & Performance Metrics

03

Automating with Excel Macros

TOPICS

- Introduction to Excel Macros for Non-Programmers
- Recording Macros
- Automating Repetitive Data Processing Tasks
- Macro Security & Best Practices

04

Excel Copilot for Managers

TOPICS

- **Understanding Excel Copilot:** What It Can and Can't Do
- Attaching Data and Asking Copilot the Right Questions

USING COPILOT FOR:

- Writing Formulas and Fixing Errors
- Sorting, Filtering and conditional formatting
- Generating Pivot tables and charts
- Generating VBA Code
- Highlighting data with prompt
- Generating Reports and Insights
- Data Summaries and Trend Analysis
- **Real-Time Scenarios:** "Ask Copilot" for Managerial Insights
- Privacy, Accuracy & Responsible Use of AI in Excel

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.

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