



Excel for Managers

Overview

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# Excel for Managers

## **1. Introduction**

Excel is widely used in most organisations. Unfortunately, many managers barely scratch the surface of Excel's capabilities and as a result waste hours on tasks that could take minutes, creating spreadsheets that are difficult to update. Or they fail to grasp the key drivers in models developed by others, severely undermining their decision-making ability.

This course will turn managers into effective Excel users, enabling them to create well-formatted efficient models and gain new insights into key business issues.

## **2. Who will benefit**

All managers. The course will be tailored to the specific experience and needs of delegates.

### 3. Course Outline

A typical “fundamentals” Excel course for marketers

#### The Excel Workspace

- The screen
- Cells – numbers, text and formulae
- Menus
- Moving around
- Selecting - Copy, cut and paste
- Overview of capabilities
- Working with Sheets and Files – saving
- Inserting columns and rows
- Changing height and width

#### The Key to Excel – relative and absolute addressing

- Understanding cell references
- Absolute addressing
- Copying and Filling successfully
- Autofill
- The SUM function

#### Creating a basic business model

- Model structure
- Create a simple “What if” model

#### Formatting

- Fonts, colours, borders , fills etc
- Removing gridlines
- Conditional formatting
- Graphics – pictures, text boxes, arrows

#### Charts

- Using the Chart Wizard
- Formatting
- Titles, Legends, Axes

#### Functions

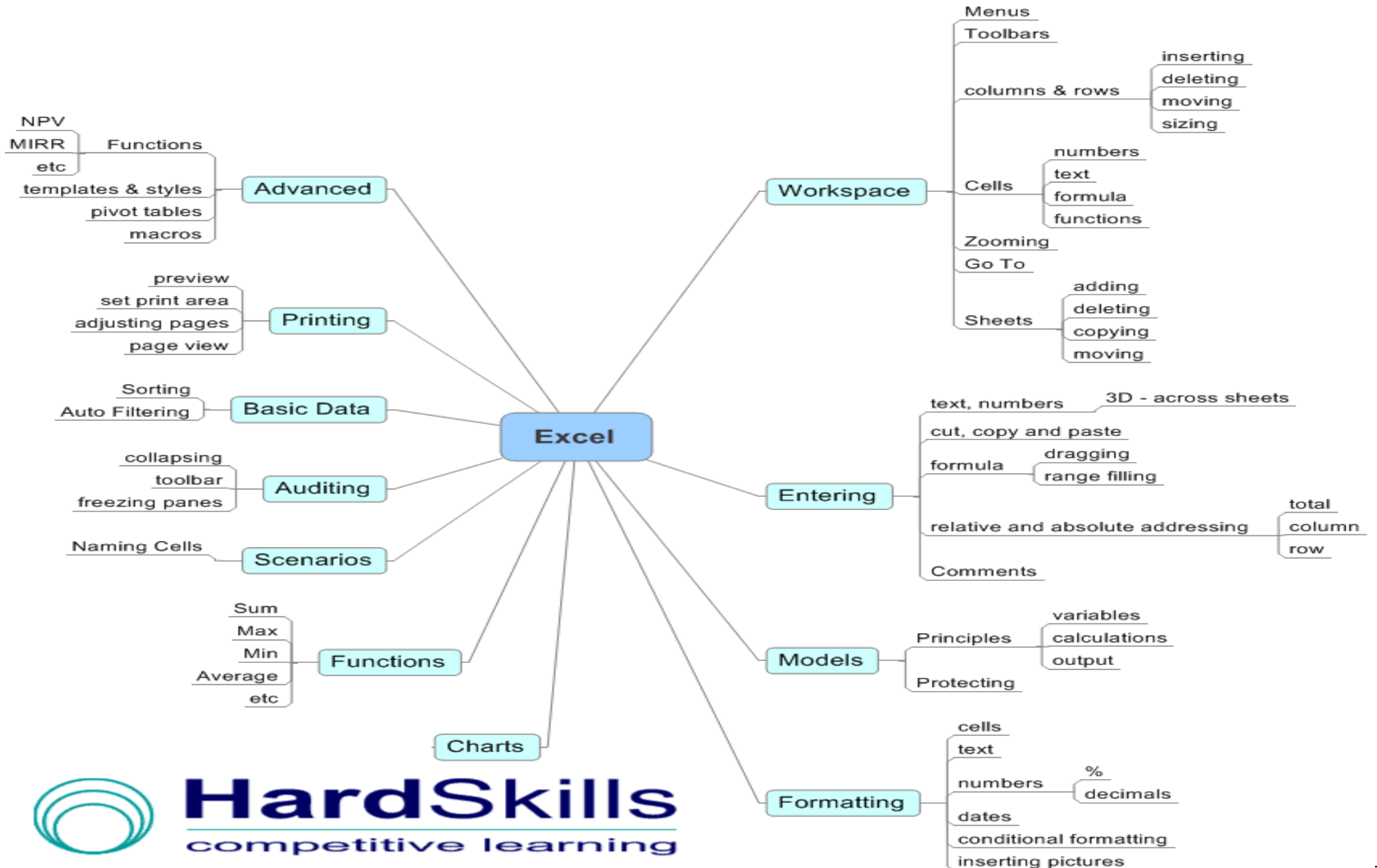
- Function Wizard
- Useful functions for marketing professionals

#### Printing

- Setting the print area
- Previewing
- Fitting to page width and height
- Manually adjusting page breaks

At “advanced” level, topics may include:

- ranges and views
- 3D spreadsheets
- templates and styles
- sorting and filtering
- macros and customising the Excel environment
- functions
- scenarios
- goal seeking
- pivot tables
- auditing
- customising user input - forms
- advanced macros



## **4. Paul Taylor – Lead Facilitator**

### **Qualifications & Memberships**

- MA in law, Oxford University
- MBA, City University, London
- Member of the Chartered Institute of Marketing
- Member of the Institute of Management Consultancy
- Accredited facilitator on Ericsson Leadership programme

### **Career**

- 18 years' experience as a consultant and trainer
- Marketing Manager, FTSE 100 company

### **Experience**

- accredited facilitator on the Ericsson global leadership programme, delivering in over 10 countries to 20 different nationalities over a five year period; development and delivery of two-day finance module for Ericsson managers and strategic marketing programme
- the design (including train-the-trainer workshops) and delivery of training programmes for ntl: Telewest / Virgin Media
- strategic management courses designed and delivered for Oxford University Press
- marketing communications and marketing effectiveness courses designed and delivered for Cisco
- four-day business management programme (customer focus, strategy, finance and business planning) designed and delivered for civil engineering firm May Gurney
- finance for non-finance managers and value-based marketing courses designed and delivered for Centrica
- consultancy and project management relating to the promotion of UK Online for Business and Best Practice initiatives for the dti
- lecturing on the Chartered Institute of Marketing postgraduate diploma