



Excel for Marketing Professionals

Overview

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Excel for Marketing Professionals

1. Introduction

These courses will enable delegates to use Excel effectively. From an understanding of relative and absolute cell addressing at the beginner level through to goal seeking, scenarios, eye-catching charts and automated macros at the advanced level, delegates will develop skills that will enable them to construct robust, easily adjustable spreadsheets quickly. The courses are set within a marketing context, addressing the types of problems that marketers face.

These are extremely hands-on courses where delegates will learn Excel by creating real-world marketing spreadsheets covering areas such as forecasting and cashflow, campaign planning and evaluating marketing inputs. Many of the models created in our courses will be of lasting value to managers.

2. Who will benefit

All marketing professionals

3. Learning outcomes

The learning outcomes will depend on the level of course undertaken. We would normally discuss the needs of the delegates and then develop a course to address these.

4. 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 marketing model

- Model structure
- Combining learning from Sessions 1 and 2 to 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

5. 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