

2-Day Excel Training Curriculum for HR Professionals

Instructor-led workshop | Beginner to intermediate | No timestamps

1. Training overview

Training objective: Enable HR professionals to use Microsoft Excel confidently to manage employee data, automate routine HR calculations, analyze workforce metrics, and create clear, actionable HR reports.

- Organize and clean employee master data accurately.
- Use essential formulas and functions to automate HR calculations.
- Track recruitment, attendance, leave, training and employee attrition.
- Analyze HR data using PivotTables, charts and conditional formatting.
- Build a basic HR dashboard for management reporting.
- Apply good practices for data accuracy, confidentiality and reporting.

Recommended learning approach: 30% demonstration and explanation, 60% hands-on practice, and 10% assessment and review.

2. Day 1 - Excel foundations and HR data management

Module 1: Excel essentials for HR

- Workbook, worksheets, cells, ranges and navigation
- Entering, editing and formatting employee records
- Sorting, filtering, freeze panes and Excel Tables
- Data validation and drop-down lists for departments and employment status

Practical exercise: Create a structured employee master sheet with employee ID, department, designation, joining date and employment status.

Module 2: Essential formulas and functions

- Arithmetic formulas and relative vs. absolute references
- SUM, AVERAGE, MIN, MAX and COUNT
- COUNTA, COUNTIF, SUMIF and IF
- IFERROR and basic error troubleshooting

Practical exercise: Calculate department headcount, average salary, employees meeting a target, and counts by employment status.

Module 3: HR-specific formulas and date calculations

- TODAY, DATE, YEAR, MONTH and DAY
- DATEDIF for completed service years, where supported
- IF and AND for eligibility and status checks
- COUNTIFS and SUMIFS for multi-condition reporting
- Joining-date, tenure and confirmation-date calculations

Practical exercise: Calculate employee tenure, identify employees approaching confirmation, and flag upcoming work anniversaries.

Module 4: Data cleaning and lookup functions

- Remove duplicates and handle blank cells
- TRIM, CLEAN, LEFT, RIGHT and TEXT
- XLOOKUP to retrieve employee or department information
- VLOOKUP for compatibility with older Excel versions
- Standardizing inconsistent text, dates and employee IDs

Practical exercise: Clean a sample employee dataset and retrieve designation and department details using employee IDs.

Day 1 deliverable: A cleaned employee master workbook with automated tenure calculations, validation rules and department-level summaries.

3. Day 2 - HR analytics, reporting and dashboards

Module 5: Advanced formulas for HR reporting

- SUMIFS, COUNTIFS and AVERAGEIFS
- Nested IF statements and IFERROR
- INDEX and MATCH for flexible lookups
- XLOOKUP and dynamic arrays, where supported
- Combining formulas to automate HR reports

Practical exercise: Generate department-wise employee counts, salary summaries and recruitment status reports using multiple criteria.

Module 6: PivotTables and PivotCharts

- Create and configure PivotTables
- Group data by department, month and location
- Summarize headcount, recruitment and training data
- Calculate counts, sums and averages
- Use slicers, filters and PivotCharts
- Refresh reports when source data changes

Practical exercise: Build a headcount report by department and location, plus a monthly recruitment summary.

Module 7: HR metrics and conditional formatting

- Conditional formatting for alerts and exceptions
- Data bars, color scales and duplicate highlighting
- Recruitment funnel and time-to-fill calculations
- Attendance and leave utilization analysis
- Attrition rate and employee movement reporting
- Training completion and compliance tracking

Practical exercise: Create a recruitment tracker, highlight overdue vacancies, and calculate HR metrics using clearly defined reporting periods and denominators.

Module 8: Building an HR dashboard

- Select relevant HR key performance indicators (KPIs)
- Create summary cards and charts
- Combine PivotTables, formulas and visualizations
- Use slicers to filter by department or location
- Apply consistent formatting and management-reporting standards
- Prepare the dashboard for review and presentation

Practical exercise: Build a one-page HR dashboard showing total headcount, hires, exits, attrition rate, recruitment status and training completion.

Module 9: Capstone project and assessment

- Clean a sample HR dataset and validate the data
- Calculate workforce metrics and create a PivotTable
- Build a basic dashboard and present three management insights

Practical exercise: Submit a complete, accurate HR report and explain the key findings.

Day 2 deliverable: A functional HR reporting dashboard supported by PivotTables, formulas, charts and HR metrics.

4. HR use cases covered

HR function	Excel application	Expected output
HR operations	Data validation, lookups, date formulas	Employee master and tenure tracker
Recruitment	COUNTIFS, date calculations, PivotTables	Vacancy and hiring tracker
Payroll support	SUMIFS, IF, lookup functions	Salary and allowance reconciliation support
Attendance and leave	Conditional formatting, formulas	Exception and leave reports
Learning & Development	Completion percentages, PivotTables	Training participation dashboard
HR business partnering	Charts, PivotTables, KPIs	Workforce insights dashboard
HR leadership	Dashboard design and trend analysis	Management reporting pack

5. Assessment and success criteria

Assessment	Description	Weight
Pre-training skills check	Diagnostic questions on formulas, data handling and reporting.	Diagnostic
Day 1 practical assessment	Clean employee data, apply formulas and calculate tenure.	25%
Day 2 practical assessment	Create a PivotTable, calculate HR metrics and build a dashboard.	35%
Capstone project	Submit an accurate HR report and explain three findings.	40%

Suggested completion standard: At least 70% overall, with demonstrated ability to perform the essential tasks independently.

6. Trainer preparation and resources

- A laptop for each participant with Microsoft Excel installed.
- A synthetic employee dataset containing approximately 100-300 records.
- Separate practice datasets for recruitment, attendance, leave and training.
- Step-by-step exercise sheets and formula reference guides.
- A sample completed HR dashboard for demonstration.
- Pre- and post-training assessment questions.

Data privacy: Use synthetic or anonymized employee data throughout the workshop. Avoid exposing actual employee salaries, personal identifiers, performance ratings or sensitive HR records.

Excel compatibility: The curriculum works best with Excel 365 or Excel 2021 and later. Teach VLOOKUP as a fallback for older versions, and make XLOOKUP and dynamic arrays optional where compatibility is uncertain.

7. Final capstone - HR Workforce Analytics Dashboard

Participants receive a sample employee dataset containing department, location, joining date, exit date, employment status, recruitment status and training completion.

- A cleaned and structured data table.
- Formula-driven employee and workforce metrics.
- A PivotTable showing headcount by department.
- A chart showing hiring and exits over time.
- A dashboard with key metrics and filters.
- Three evidence-based observations for HR management.

Evaluation criteria: Data accuracy, formula correctness, appropriate metric definitions, visual clarity and quality of insights.

Recommended approach: Keep the workshop focused on practical HR deliverables rather than teaching every Excel feature. Participants should leave with three reusable assets: an employee master template, an HR metrics workbook and a management dashboard.