

Two-Day Excel for Sales: Beginner Course

This is a simple, two-day course for people who have never used Excel, or who only open it now and then. Each step is taught slowly, with sales examples and lots of practice.

Who it is for: Salespeople, account managers, and team leaders who are new to Excel

Length: 2 days, about 6 hours of class each day

What you need: A laptop with Excel installed. No Excel experience is needed. We give you practice files. **How we teach:** The trainer shows one idea (5 to 10 minutes), then you try it yourself right away. About one-quarter explaining, three-quarters practice.

What You Will Be Able to Do

After two days, you will be able to:

- Type sales information into Excel and make it neat and easy to read
- Add up, average, and count numbers with simple formulas
- Work out percentages such as growth, discount, and progress toward target
- Sort and filter a customer list to find what you need in seconds
- Get totals by salesperson, region, or product
- Build a simple summary and a chart to share with your manager

Words You Will Hear

You do not need to memorize these. The trainer explains each one when we use it.

Word	What it means
Cell	One box in the grid, such as A1 (column A, row 1)
Row and column	Rows go across (numbers on the left). Columns go down (letters on top).
Sheet	One page inside your Excel file. Tabs at the bottom switch sheets.
Formula	A calculation you type, always starting with =, such as =B2*C2

Word	What it means
Function	A ready-made formula, such as SUM, that does the work for you
Table	A neat block of data with titles at the top that Excel can sort and filter
PivotTable	A tool that summarizes lots of data in a few clicks

Day 1: Getting Comfortable and Doing Basic Math

Goal for the day: be able to enter data, make it look good, and add up sales with confidence.

Time	Session	What you will do
9:00 – 9:30	Welcome and tour of Excel	Meet the group, open Excel, and find the ribbon, cells, sheets, and Save button
9:30 – 10:30	Session 1: Enter and format data	Type a sales list, fix column widths, and add colors, borders, and currency format
10:30 – 10:45	Break	
10:45 – 12:00	Session 2: Your first formulas	Add, subtract, multiply, and divide, then use SUM, AVERAGE, MIN, MAX, and COUNT
12:00 – 1:00	Lunch	
1:00 – 2:15	Session 3: Percentages and sales math	Work out discounts, growth, share of total, and progress toward target
2:15 – 2:30	Break	
2:30 – 3:30	Session 4: Sort, filter, and tidy a list	Sort customers, filter by region, and remove repeated names
3:30 – 4:00	Review and practice time	Redo your favorite exercise and ask questions

Session 1: Enter and Format Data

- Move around a sheet and select cells, rows, and columns
- Type text, numbers, and dates, and fix mistakes (Undo with Ctrl+Z)
- Make columns wider, wrap text, and align cells
- Format money, percentages, and dates
- Save your file and give it a clear name
- **Practice:** Build a list of 15 sales with date, customer, product, quantity, and price

Session 2: Your First Formulas

- A formula always starts with an equals sign (=)
- Use cell names in formulas, such as =B2*C2, instead of typing numbers
- Copy a formula down a whole column with the fill handle (the small square at the corner of a cell)
- Use AutoSum (the Σ button) to total a column in one click
- Find the average, highest, lowest, and count of your sales
- **Practice:** Add a Total column (quantity $\times$ price) to your sales list, then total the whole list

Session 3: Percentages and Sales Math

- What a percentage is in Excel and how to format a cell as %
- Discount: price $\times$ discount rate
- Growth: how much higher or lower this month is than last month
- Share of total: how much one customer contributes
- Progress toward target: sales divided by quota
- Why locking a cell with \$ (press F4) keeps a formula from breaking when you copy it
- **Practice:** Work out each salesperson's percentage of quota and each product's share of total sales

Session 4: Sort, Filter, and Tidy a List

- Turn a list into a Table (Ctrl+T) so it is easy to manage
- Sort A to Z, Z to A, and largest to smallest
- Filter to show only one region, one rep, or sales above a certain amount
- Freeze the top row so titles stay visible when you scroll

- Remove duplicate rows and clean up extra spaces
- **Practice:** Clean a short customer list, then find all customers in one region with orders over \$1,000

Day 2: Answering Sales Questions

Goal for the day: use Excel to answer real questions such as who sold the most, which region is behind, and what the customer's price is.

Time	Session	What you will do
9:00 – 9:20	Warm-up	Quick quiz and questions from Day 1
9:20 – 10:30	Session 5: Making decisions with IF	Show "Met target" or "Below target" automatically
10:30 – 10:45	Break	
10:45 – 12:00	Session 6: Totals by rep, region, or product	Use SUMIF and COUNTIF to add up only what you need
12:00 – 1:00	Lunch	
1:00 – 2:00	Session 7: Looking up information	Pull a customer's region or a product's price from another list
2:00 – 2:15	Break	
2:15 – 3:15	Session 8: Summaries and charts	Build a PivotTable and a simple chart
3:15 – 4:00	Final project and wrap-up	Put it all together, share one result, and complete the feedback form

Session 5: Making Decisions with IF

- IF checks something and gives one answer if true and another if false
- Example: =IF(B2>=C2,"Met target","Below target")
- Use IF to work out a simple commission, such as 5% if sales are over target and 3% if not

- Color cells automatically with conditional formatting (for example, red when below target)
- **Practice:** Add a status column and a commission column to the quota list from Day 1

Session 6: Totals by Rep, Region, or Product

- SUMIF adds up numbers only when something matches, such as all sales for one rep
- COUNTIF counts how many times something appears, such as the number of deals in one region
- Build a small summary table with one line per rep
- Check your work: the pieces should add up to the grand total
- **Practice:** Create a sales-by-region table and a deals-by-rep table from the practice file

Session 7: Looking Up Information

- A lookup finds a value in one list and brings it into another, like looking up a name in a phone book
- Use XLOOKUP to find a product's price or a customer's region
- If your Excel is older and has no XLOOKUP, use VLOOKUP instead; the trainer shows both
- Hide error messages with IFERROR so your sheet stays tidy
- **Practice:** Add the product price and customer region to an orders list using lookups

Session 8: Summaries and Charts

- Build a PivotTable by dragging fields: for example, total sales by product and by month
- Refresh a PivotTable when data changes
- Make a column chart or line chart from your summary
- Add a clear title and labels, and remove clutter
- Copy your chart into an email or presentation
- **Practice:** Build a PivotTable of sales by region and a chart that shows the best and worst regions

Final Project and Wrap-Up (45 min)

- **Task:** You get a short list of a month's sales. Clean it, add a Total column, add a lookup for region, summarize sales by region, and make one chart

- **Share:** Each person or pair shows one thing they found
- **Wrap-up:** Review the top skills, complete a short quiz, and fill in the feedback form

Ten Shortcuts to Keep

Shortcut	What it does
Ctrl+S	Save
Ctrl+Z	Undo your last action
Ctrl+C, Ctrl+V	Copy and paste
Ctrl+Arrow key	Jump to the edge of your data
Ctrl+T	Turn a list into a Table
Ctrl+Shift+L	Turn filters on or off
Alt+=	AutoSum
F4	Lock a cell reference with \$
Ctrl+1	Open Format Cells
Ctrl+;	Insert today's date

What to Bring and What We Provide

- **You bring:** A laptop with Excel, and one small task from your own job you would like to do faster (no real customer data, please)
- **We provide:** Practice files for every session, finished example files to compare with yours, a one-page cheat sheet, a short quiz at the start and end, and a feedback form

How We Check Your Progress

- A short quiz at the start and end of the course shows how much you learned
- The trainer walks around and helps during every practice
- The final project is checked against a short list: data is neat, totals are correct, and the chart is easy to read

Trainer Tips

- Go slowly and avoid jargon. Say "the formula bar" and show it, rather than assuming people know.
- Repeat key steps: type =, click a cell, press Enter, copy down.
- Pair people who feel confident with people who feel nervous.
- Use made-up sales data so nobody has to worry about privacy.
- Keep a "parking lot" for advanced questions about macros or Power Query and offer a follow-up session.
- Make sure Excel versions are checked at the start so lookups use the right function.
- Celebrate small wins; confidence matters more than speed on Day 1.