



Crystal Lean Solutions

Training
Academy

Introduction to Excel



Introduction to Excel

DURATION:	Day 1
ACCREDITATION:	Crystal Lean Solutions
COURSE CODE:	1093

AIM:

This course aims to equip participants with practical Excel skills to streamline data collection and preparation. Learners will use features such as structured tables, drop-down menus, and conditional formatting to ensure data consistency, while leveraging Power Query to automate the collation and transformation of data from multiple sources—reducing manual, repetitive tasks and enabling faster, more reliable analysis.

OBJECTIVES:

At the end of the course, learners will be able to:

- ✿ Set up Excel sheets for quick and effective data collection
- ✿ Structure master data using Tables and Dynamic Drop-down Menus
- ✿ Apply Conditional Formatting to highlight key data points
- ✿ Protect cells and worksheets to prevent data loss or errors
- ✿ Use Power Query to collate and clean data from multiple sources
- ✿ Automate repetitive preparation steps with Power Query
- ✿ Sort and filter data efficiently using Tables
- ✿ Create Pivot Tables and Pivot Charts for summary analysis
- ✿ Build interactive Dashboards to visualise key insights

THIS PROGRAMME IS FOR:

The Introduction to Excel programme is suitable for anyone who works with data in Microsoft Excel and wants to improve the accuracy, consistency, and efficiency of their data management and reporting, including but not limited to:

- ✿ Administrative and executive staff responsible for data entry or reporting
- ✿ Analysts and coordinators who prepare or clean data for reports and dashboards
- ✿ Team leaders and managers who rely on Excel for monitoring performance metrics
- ✿ Professionals who want to automate repetitive Excel tasks and streamline workflows

PROGRAMME CONTENT:

1. Introduction to Smart Data Management in Excel

- ✧ Importance of data consistency and structure
- ✧ Overview of key Excel tools for data organisation and automation

2. Setting Up Excel for Data Collection

- ✧ Designing clean, logical data entry sheets
- ✧ Creating structured **Tables** for flexible data ranges
- ✧ Using **Dynamic Drop-down Menus (Data Validation)** for standardised input

3. Ensuring Data Accuracy and Visual Clarity

- ✧ Applying **Conditional Formatting** to highlight trends and exceptions
- ✧ **Protecting cells and worksheets** to prevent accidental changes

4. Automating Data Preparation with Power Query

- ✧ Importing and combining data from multiple sources
- ✧ Cleaning, transforming, and refreshing data automatically
- ✧ Building repeatable workflows to replace manual steps

5. Analysing and Presenting Data

- ✧ Sorting, filtering, and summarising data using **Tables and Pivot Tables**
- ✧ Creating **Pivot Charts** for visual summaries
- ✧ Building simple **interactive dashboards** to present insights clearly

6. Practical Hands-On Exercises

- ✧ Step-by-step guided activities on each feature
- ✧ Real-world scenario: from data collection to dashboard

ASSESSMENT:	None
GRADING:	Not Applicable
PROGRAMME DELIVERY:	Classroom
TOTAL DURATION OF THE PROGRAMME INCLUDES:	1 Day
CERTIFICATION CRITERIA:	Completion of all training days on programme
CERTIFICATION BODY:	Crystal Lean Solutions
RECOGNITION OF PRIOR LEARNING (RPL):	N/A
PRE-REQUISITE:	None

OTHER COURSES OF INTEREST FROM THE CLS TRAINING ACADEMY:



- ☀ Rapid Problem Solving
- ☀ A3 Problem Solving
- ☀ Human Error Problem Solving
- ☀ Leadership Training
- ☀ Presentation Skills
- ☀ Teamwork & Conflict Management
- ☀ Lean Six Sigma Yellow Belt
- ☀ Lean Six Sigma Green Belt