# THE ONE
## CRITICAL EXCEL SKILL YOU NEED

XELPLUS / LEILA GHARANI

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# Introduction

## Are you using Excel in baby mode too?

Fun fact: did you know that many people think they're Excel wizards when in reality, they're barely scraping by?

It's true! Despite being one of the most widely used programs in the business world, a shocking number of people only have a basic understanding of Excel.

Sure, they can create a basic spreadsheet and maybe use some formulas. But that's not enough anymore in today's digital world where even small companies collect millions of data points.

Nowadays, you need be able to take data - that's often in less than pristine condition – **transform** and **clean** it. But it doesn't end there! You then need to turn this raw data into **useful metrics** and present the big picture with **dynamic reports**.

That's how you make a name for yourself!

At this point you may think, "Ok, but how do I do all that?"

That's what this quick guide is all about. Don't miss out on any opportunities going forward because of your current skill level. Read on to learn how you can improve your skills and stay ahead of the competition.

*Leila Gharani*
CEO and Founder of XelPlus

# Who Am I?

**Hi - I'm Leila,
the founder of XelPlus.**

We're a fast-growing online education company, specializing in Excel, Power BI, and other applications to help you, the data wrangler. Our courses and tutorials have been featured in BBC, Microsoft and CNBC.

As a Microsoft MVP, I sit in on those monthly video calls where the Microsoft team tells us the shiny new features coming down the pipeline. My mission is to make sure you know how to use them.

I've worked a corporate job for 15 years. Started as an Economist (after getting my Masters in Economics), then switched to consulting, project management with system implementations for Finance and IT.

I love Excel and anything technical, but I can't stand when these tools are taught to me like I'm a robot. Around here, we teach Excel in plain-English.

Ready? Then let's explore what you need to know to advance your career.

> **"**
>
> *Continuous learning is the minimum requirement for success in any field.*
>
> **Brian Tracy**

# The Problem

**Here are some typical challenges in the life of an Excel user.**

They apply whether you work in finance, marketing, sales, HR, procurement, or you run your own company:

- Before you can even start analyzing anything you have to spend hours cleaning the data files you receive 😔

- After combining multiple data sources in your workbook, Excel gets soooo slow 🐌

- Each month you have to follow the same exact steps to create your reports 😵‍💫

- The workbook you're using requires so many complex formulas that it becomes difficult to maintain 🤯

- You're so absorbed with preparing data that you're having trouble transforming it into meaningful reports 😓

If any of this sounds familiar to you, you're not alone!

In fact, I hear this a lot. The good news is that it doesn't have to be that way.

I invite you to leave the Excel baby mode behind. It's not meant to handle these tasks.

I'll show you how you can make your workday easier AND be ready for future challenges.

# The Solution

**There is a whole world beyond cells & formulas in Excel that many don't know about:**

**Power Excel**

Knowing how to use Power Excel is **the** must-have skill that will set you apart from the competition. It will save you hours at work and significantly reduce your headaches.

## What is Power Excel?

There are 2 components to Power Excel:

1. Power Query
2. Power Pivot

I'll give you an explanation of what these are. But first, I want to share what some of our smart members who use Excel just like you, have to say. This is right after they discovered the Power Side of Excel:

> "
> I like that I can reduce the number of requests to IT and I can organize the data the way I need it.
>
> **Mike Hoffman**

> "
> I got a task from my boss, and I used Power Query to analyze 3.4 million rows! Amazing! Thank you so much for teaching me this.
>
> **Jeanette Grunnan**

# The ONE Skill

## ONE Skill - Two Components

They go together like **shampoo & conditioner**

or **shaving cream & aftershave**.

You pretty much always NEED the first one but the second one is sometimes optional. It depends on what you're dealing with.

**The same applies to Power Query & Power Pivot.**

You'll need the first one but the second one depends on how your data is organized and whether you'll need a proper model to analyze it.

Most people don't realize these tools are for them! They think Power Query is like a fancy hair product that they will never use. But you are different!

You know that Power Query is like shampoo - it cleans your data and makes it ready for analysis. Power Pivot is your conditioner. Yes. Power Pivot is optional, but it can help you detangle and relate your data in different ways. You'll have flexibility styling your data, just like you can create a hairstyle that suits your face shape.

Knowing how to use both Power Query and Power Pivot will give you an edge over others. You will be able to save time and impress your managers with your skills. **Power Excel is not just a tool, it's a superpower!**

# First Component

## ONE Skill – Two Components

**Power Query** is the power tool you need when you're faced with the task of getting data into Excel.

It can also save you from pulling your hair out as you clean data. And it allows you to ship reports to your boss and colleagues faster – winning you praise and promotions.

And the best part? Power Query remembers. Yes, you can record the steps you take to import and clean your data.

That way, when a new batch of data arrives, all you need to do is click "Refresh." Instantly, your data is imported, cleaned, and beautifully presented.

I swear, using Power Query must be the same feeling people had 100 years ago when they drove a car for the first time.
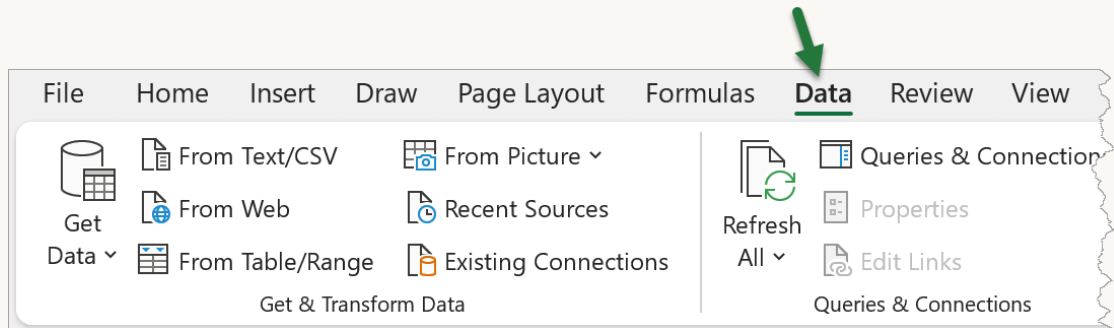
It lets you go fast 🚀.

# Where Is Power Query?
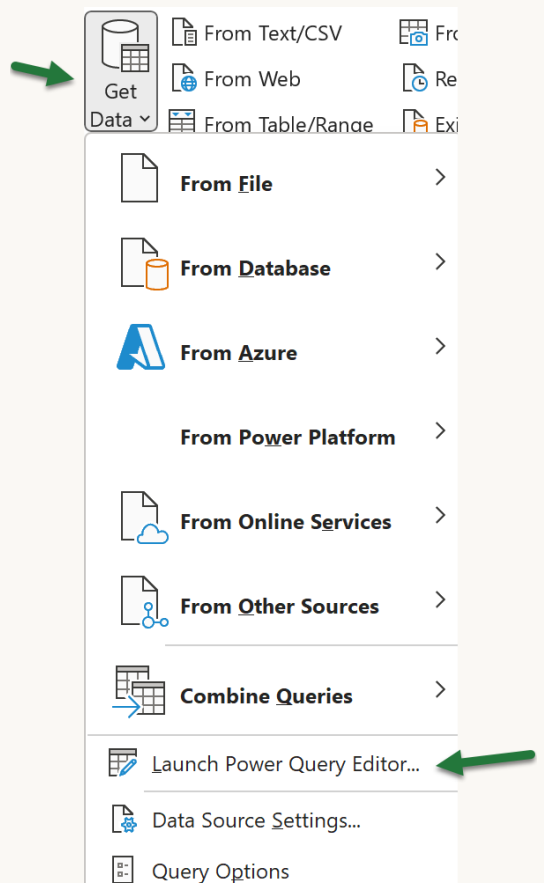
## So Where Is Power Query In Excel?

You'll find Power Query in the **Data tab** of Excel's Ribbon.



You can get to the Power Query Editor directly if you click on the Get Data icon and "Launch Power Query Editor".

The Power Query editor also launches, the moment you start the data import process.

For example, when you select any of the buttons in the Get & Transform data section. First, you'll be prompted to choose the file or web address you want to import data from. Then, the Power Query editor opens, allowing you to import only the data that you need.

# Second Component

Okay, you finish selecting and cleaning your data. You say, "Thank you, Power Query," and place it back in your toolbox.

Now you can either import the data directly into Excel via a Pivot Table or a Table.

OR you can reach for the second power tool:

**Power Pivot.**

How do you know if you need Power Pivot? It's simple.
If you need to:

- Import more data and relate them together
- Create hierarchies
- Perform complex calculations and aggregations
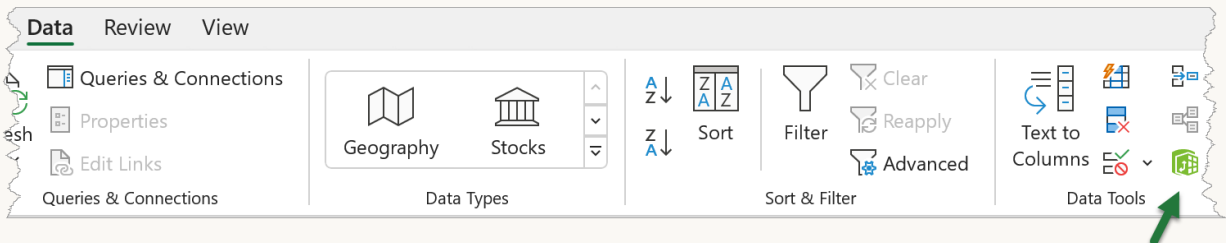
That's when you'll reach for Power Pivot.
When things start to get complicated, Power Pivot can help.
It will bridge the gap between "looking" at different datasets and analyzing and presenting it.

# Where Is Power Pivot?

## Where Is Power Pivot In Excel?

You'll find Power Pivot also in the **Data tab** of Excel's Ribbon.
It's the green icon inside the Data Tools Group.



You can directly send data from Power Query to Power Pivot.
Inside Power Pivot, you can then relate the different datasets with one another. If you're familiar with Access, it's a very similar process.

If you need to do additional calculations, you can create your own formulas. Formulas created in Power Pivot are called DAX formulas (Data Analysis Expressions).

DAX formulas are like Excel formulas. They have a similar syntax except they calculate lightning-fast on large data. They also let you do some amazing things like time intelligence calculations (YTD, rolling average, % change...) as well as dynamic aggregations.

# Become Unstoppable

## Recap. Do You Need Both Power Tools?

Not necessarily.

At XelPlus we use Power Query on its own 70% of the time. But there is that 30% when we need to design an overview report and connect data from our different systems together to see the big picture.

Generally, Power Pivot is not needed if you don't need to relate the data and create models with more detailed calculations.

For example, if you just want to filter, remove blanks, add calculated columns, sort or transpose your data, Power Query can do that for you.

But sometimes you do need Power Pivot. For example, if you want to create relationships between different tables and analyze your data more deeply.

So, depending on your needs and goals, you can choose whether to use Power Query alone or together with Power Pivot.

# Important!

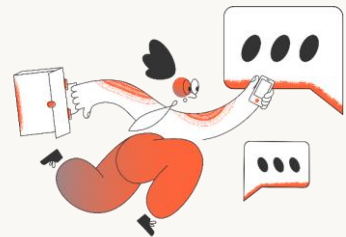**Let's clear up a common misconception.**

When I tell people about **Power Excel**, they often assume these tools are only for "power" aka advanced users or for people who work with millions of rows of data. This myth really bugs me.

No, these are power tools – for <u>everyone</u>. Power Excel is not reserved for Excel masters!

Rather, these are powerful tools that can benefit even the Excel beginner. It's nothing to be feared!

At the end of the day, these power tools are nothing more than a series of clicks.

Once you get to know them a little bit, you'll think, "*Where have you been all my life?*"
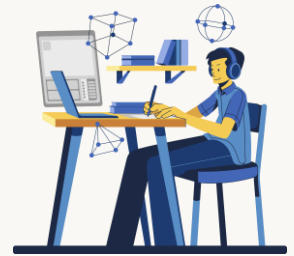
# Time to Leave the Baby Mode!

**When will you set aside the time to make sure your Excel skills stay sharp?**

My advice is to dig your well before you're thirsty.

Because if you don't learn Power Excel, rest assured, other people are. We have thousands of them among my students and YouTube subscribers.

And they are the ones who will reap the benefits going forward. They will be first in line for promotions, pay raises, and praise.

You can be one of them!

Because I absolutely believe these power tools are the future, I created step-by-step online course to help you leverage Excel's biggest time-saving features.

Today, I'm excited to invite you to become a student in these course. On the next page I prepared the learning path you can follow to master Power Excel.
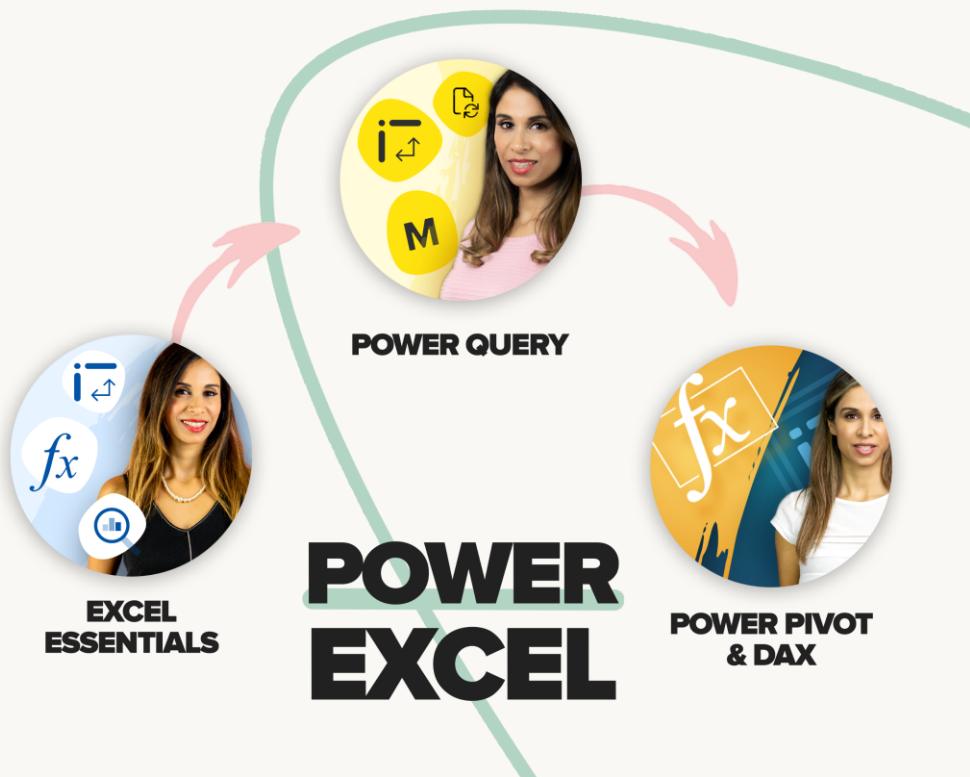
It was built for the Excel user who respects the theory but spends their day in the trenches.

# Optimal Learning Path

If you're not confident in your Excel skills, we recommend to begin with our **Excel Essentials** course. This course will provide a solid foundation and help you overcome any frustrations you may have with Excel.

Next, you'll dive into Power Query followed by Power Pivot. We offer both courses in a special **Power Excel Bundle**.

**POWER QUERY**

**EXCEL ESSENTIALS**

**POWER EXCEL**

**POWER PIVOT & DAX**

Click the buttons below to begin the easy check-out process & start your training today.

Excel Essentials

Power Excel Bundle

# Success Can Look Like...

**We can't predict what will happen once you become a Power Excel User. But we can share what some of our members achieved:**

> "

This is the best money I ever spent on my education. Leila has changed the course of my career. Her teaching skills are unmatched.

I used to direct live news and have a master's in communication. I am now a Business Analyst and manage reporting requirements for my company.

**Amrita O'Sullivan**

> "

I was already promoted after taking your Power Query course. Thank you, Leila.

**Manish Daulat**

# Paul went from a 21-day unusable report to a 1-day fully dynamic one.

> "

Working for my client, a multinational manufacturing company, the head of procurement asked me to make a model to track the steel prices, as steel is a large component of their cost.

I have worked for the past 10 years as a management consultant and am considered an Excel expert by virtually all my clients and colleagues. My initial model was built without Power Query/PowerPivot. It took me at least 21 man-days to build as client requests changed and the model became increasingly complex.

In the final days of making the model, it became clear that although it worked, it was hardly sustainable: it took me 4 hours (I've got the recordings) to explain to the client how the model works and needs to be updated.

Around the same time, I started Leila's DAX and Power Query course. Based on her teachings, I agreed with the client to rebuild the model, generating the same output but through PQ/DAX. It took me 10 full working days to set it up – including at least 70% of time just waiting for PQ to load the data, while I followed the courses. The result: a virtually fully automated report that was more dynamic than the first one.

After this second iteration, and being much more comfortable with PQ/DAX, I decided to build the same model with everything else Leila taught me while I was making the second iteration of the model. Now, using locally stored representative snippets of the client files (to avoid long loading times) I built an even better version of the report in under a day.

Bottom line: from a 21-day unusable model to a 1-day fully dynamic and automated report thanks to Leila. A steep learning curve, but I'll never use Excel in the same way again. - **Paul**

**Our members get results.**

# Will You Be The Next Success Story?

*Leila*



[www.xelplus.com](http://www.xelplus.com)