



### Transcript for Session 027

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#### **Transcript:**

Hey there, podcast listeners, welcome to <http://chandoo.org/podcast>. Let me first wish you a very happy new year 2015. I am so glad to be doing the very first podcast of 2015 and I have so much news and awesome insights to share with you this year. I also want to really thank you for supporting <http://chandoo.org/podcast> and making 2014 a really memorable year here for all of us at the <http://chandoo.org/> company as well as my family.

Let me share a couple of brief announcements first. If you are wondering how my New Year celebrations went, let me tell you they were really awesome. Every year on 1st of January, I have been getting an email for the last 6 years, and this year also it was special. It is an email from Microsoft awarding me the **MVP Award for 2015**. It has become a ritual over the last few years to celebrate New Year's by looking at that email from Microsoft and feeling happy about what I have done and feeling much more responsible about what I am set out to do in the next year. This year, Jo, my wife, made a cake on New Year's Eve and the kids stayed up late. They don't usually have any idea about New Year but this year they were very adamant and they wanted to stay up because of the cake. We told them that they can't eat the cake till the clock struck 12 so they waited till midnight and we had the cake and went to bed. And, I started the New Year with a fantastic fitness workout. On 2nd January, I went on a bicycle expedition for 2 days. We went to a nearby hilly area and I rode for about 150 kms (roughly 100 miles) for 2 days in a very difficult terrain. I had a lot of self-doubt before I started that expedition. I wasn't even sure if I would complete it because most of the bicycling that I do is on flat terrain moderate climbs. But, this was different. I think on the first day, we climbed about 5000 feet altogether and the elevation gain was roughly 1000 meters or 3000 feet. But, we went up and then down and we were constantly climbing. So, it was a lot of hard work and I feel very happy to have completed that expedition and explored really natural and very beautiful places near our house. That's how our new year started and I hope your new year is looking great so far and I really wish you the very best year ahead.

Moving on, I also want to tell you about two exciting events that I am doing in 2015. The first one is that I will be speaking at the **Pass BA Conference in Santa Clara, California in the month of April 2015**. This is a **Business Analytics conference** that happens every year in USA and I have been itching to go there and at least be a participant for the last couple of editions but, somehow, I couldn't get my dates or calendar right. This time, when the event was happening, they invited me to speak and I was just jumping with



joy to accept that invitation. I am really honoured and thrilled to be part of this conference. This is the place where a lot of rock-stars of the data analytics world usually meet and share fantastic ideas and have really mind-blowing sessions about how to analyse data better and how to prepare better charts, make awesome dashboards and all sorts of things. I will be doing a couple of sessions in that conference. Apart from that, I am also doing a **pre-conference training program** for one whole day on creating dashboards. I will leave a link to the conference and how you can sign up for it in the show notes. Please visit <http://chandoo.org/session27> where you can find that information. Remember, it is happening towards the end of April 2015 in Santa Clara, California. I also want to tell you that it a very popular event and it usually sells out very fast so if you would like to book yourself for this event then I suggest that you hurry up. I would love to see some of you there.

The next thing that I am doing is a bunch of **master classes**. These are **two day classes in Australia in May and June**. I will be doing the classes in Sydney and Melbourne and probably in Brisbane too. I have been to Australia in 2012 and it was a really memorable experience so I wanted to go back again and offer some of the training there and help many of our customers who are already living there. So, if you are from Australia, Singapore or one of the nearby places, give it a thought. I will leave a link to this also in the show notes. Well, that's a little bit about the start of year announcements. I will definitely talk about these conferences and master classes in the upcoming podcasts too.

Let's now get into the topic for the day. Today, we are going to talk about **15 ways to make you awesome in Excel and your work in 2015**. Well, this is a good topic to start the year and it is a very general topic where I am going to share some of the popular ways in which you can learn Excel and improve your skills in a dramatic, drastic fashion.

To keep the list simple, I have categorized these 15 methods into **three buckets - learning, application and sharing**. Each of these individual strategies will help you maximize your skills and you'll feel a lot better about yourself and your environment. Let's talk about the individual strategies. When it comes to **learning**, there are many ways to learn Excel. I am going to talk about seven of them. The first is to **try writing a new formula**. There are hundreds of formulas in Excel and every now and then, whenever I get a chance, I usually introduce a new formula to you so that you are familiar with it and apply it. But, most of us work in a silo environment where we end up doing similar analysis or work every day. So, we don't get to experiment with what else is out there. Formulas fall into that bucket very quickly because there are hundreds of formulas and to do our work successfully, we just need about 5-10 of them. So, we often just use those and we don't even bother about the other formulas. So, my suggestion to you is to pick up at least one formula that is new to you this year and apply it. If you are wondering what formula to pick, my suggestion is to simply go to your formula ribbon and click on the Insert Function button and see what else is there that you haven't really used. This is how I used to learn Excel very early on when I was working as an Analyst. Often, when I had no work or when there was some downtime in my work, I would go the Insert Function box, select a function, read the description and see how I may be able to apply that function for my work.



Here are some formulas that I recommend you should consider trying to learn in 2015. If you are a beginner or intermediate level user of Excel and if you have not used these formulas before, try learning SUBTOTAL, SUMPRODUCT or one of those kinds of formulas. And, if you are an advanced level user of Excel, you could learn AGGREGATE or MMULT [matrix multiplication] etc. These are very powerful and they can do a lot of things. A few other formulas that are available in Excel that probably we don't even use unless there is a requirement to apply the formula are TRANSPOSE, ADDRESS, INDIRECT etc. So, consider these functions and see how you can understand them and try to add them to your skill set so that you can apply them when there is a requirement.

The next way to learn Excel is to **try to use a feature that you have not used in Excel before**. Excel has thousands of features. There are many ribbons and each of them is filled with lots of little buttons and icons that can do certain things. So, go ahead and see and click on one of those things that you haven't clicked on earlier and see what happens and how it can be applicable for you. Some of the things that I have only clicked a few times earlier are SOLVER [my work doesn't require me to use it but I plan to learn a little bit more about it and maybe share some information on the blog] and FLASHFILL [a powerful feature in Excel 2013 and I haven't really used it much so far; I am planning to learn and use it in 2015]. You too can do the same. There are many things out there in the Excel ribbon; click on them and see what happens and how you can apply them.

The third one is to **create a chart**. Again, not the kinds of charts that you have already been creating, but a chart that you have not yet tried like a custom chart or a complicated one and try to learn the entire process. For example, if you are looking for a challenge, I would recommend that you try creating either a waterfall chart or a Gantt chart or one of the combination charts with a bit of interactive control through user forms or built-in form controls. Those are really powerful and by creating them, you will learn a lot about chart formatting, chart settings and how to customize charts.

The next way to learn Excel is to **learn about macros**. Macros or VBA is one area where most of us would shy away unless there is a requirement. This is because whenever somebody says macro, we automatically think of programming or feel a little bit terrified of the concept of writing code in Excel. But, believe me; the moment you write a formula in Excel, you are already a programmer. You are building functionality that is not already part of that software. So, think of yourself as a programmer or a techie. That will make you feel at ease with the VBA functionality in Excel. If you are new to VBA and have not yet done any VBA programming, please visit <http://chandoo.org/podcast> where we have a prior podcast episode on VBA, i.e. what it is and how to use it. So, listen to that episode for some information on VBA.



The other way to learn Excel is to try to **link up Excel with other applications on your computer**, for example, how do I link Excel with MS Word? Or, how do I use Excel data to create charts and slides in PowerPoint? Or, how do I use Excel information to send automatic emails through Outlook? Or, how do I get data that is available in MS Access or SQL Server into Excel? So, think like that and see what the method to achieve it is. You don't have to understand the entire process or be very proficient with it but by thinking about how to link Excel with other applications, you suddenly open up new possibilities and new doors in your work.

These are some of the general methods for learning - learning about a new formula, feature or chart, learning about VBA or learning how to link Excel to other applications. There are two more methods in which you can learn about Excel. One is that you can **consider joining a course**. This could be a live class or an online class or anything like that. I won't recommend which course you should go for. We offer several courses at <http://chandoo.org/>. You can consider them but it is up to you. Again, learning from a course has an advantage that it will put you in a systematic, step-by-step learning path where you will learn a lot of skills in a short span of time. If your work involves using Excel often then please consider joining a course so that you'll improve dramatically in a short span of time.

The other option is to **purchase a book**. Every year, I buy at least 3-4 Excel books and read them. Sometimes, I read them many times within that year! Last year, I bought books called Data Smart, Excel Data Analysis and Business Modeling, Ctrl+Shift+Enter and I have shared some of these reviews with you in prior podcast episodes. So, go ahead and send a few dollars like maybe \$10-15. Or, if you have a tablet or Kindle then purchase the e-book versions and read them. Usually, a physical book tends to be better for Excel because Excel books contain a lot of images and illustrations which are poorly rendered on a tablet or Kindle. But, go for whatever works for you and I highly recommend reading books because when you are reading books, you're not distracted. Your entire attention usually goes to the book; you are sitting in a chair or are curled up in bed and reading the book. So, your mind tends to focus a lot and you will automatically learn more. Whereas, when you are listening to a podcast or watching a video on YouTube or when you are reading a blog post, you have a lot of distractions available to you. You could tab out and go to another page where there is something else going on or you could quickly check your Facebook feed or there might be a traffic light that is distracting you and you suddenly tune out of the podcast and pay attention to the road. Whereas, when you are reading a book, you are 100% there. So, books tend to be a really good idea to brush up your skills and learn new things. These are the seven methods through which you can learn Excel.

Now, let's talk about **application**. It's not good enough to just learn because you tend to quickly forget what you learn. This happens to me all the time. I learn several things every year and many times I don't use those skills and so I kind of lose them. This is where application comes into the picture. In order to retain most of what you are learning, I highly encourage you to apply those skills for some of the work projects. The biggest challenge is that most of us end up doing similar kind of work every day. If you are an Invoice Analyst, you are handling lots of invoices every day and doing analysis on them. So, you are a



Payment Analyst. There is really no variety in your work and so you don't really get the chance to create that new chart or use that macro or anything. This is where some of the strategies that I now mention will help you. When it comes to applying your skills, I say that you should **take up a project**. This could be a work project that nobody is willing to take up or it is a work project where there are not enough resources or it is not a priority and your boss has kind of shelved it and he is waiting for somebody from the Corporate section to say that they have hired a new person to do this. So, take up a project like that. For example, if you have a manual process in your workflow, go ahead and propose to your boss that you would like to automate this through a bit of VBA.

The other way to apply your skills is to **take up consulting on a part-time basis**. This is especially useful for people who are at an intermediate or advanced level of Excel skills. You can go to any freelancing websites like <http://odesk.com/> and sign up as an Excel freelancer there and apply for some projects. Even though you probably don't need that extra money which could be \$10 or \$200, you will end up learning different skills and applying them in an environment that is not similar to your work. So, try consulting outside. A word of caution when you are consulting outside, make sure that you are not violating any of your current employer or workplace regulations because many companies don't usually appreciate if their employees are also doing part-time work. So, make sure that you are not doing something that is against your company rules.

The other way to apply skills is to **create a new type of chart or report**. This is where I often learn most. I go to websites like New York Times and Washington Daily etc. and I go to their interactive graphs section where they put nice infographics or interactive graphs or reports which contain a lot of charts and a lot of bells and whistles. I try to re-create them in Excel. This is purely as a personal challenge where I try to learn additional concepts, skills or techniques about how to use Excel, how to set up charts, how to format them, how to make them look elegant etc. You can also do that. You can go to your favorite newspaper website and see what they are trying to do in terms of graphic representations and maybe try to copy them for your Excel work just as a personal project. This is one way to apply skills.

You can also **learn about things like PowerPivot, Power BI** etc. which are adding extra capabilities on top of Excel. The advantage of these things is that they do similar things as Excel. For example, you can create Pivot Tables and reports with regular Excel. But, if you use Power BI, you are enhancing what can be done with Excel but with more capability and more power. So, learn about Power BI and apply it to your work. This is one way to improve your application skills and retain more in your mind. This is our second strategy - application - you can take up a work project, consult on the side, visit a website like New York Times and try to re-create their charts in Excel or you could apply concepts like PowerQuery, Power BI, PowerPivot or PowerView into your work.

The third and most important aspect of learning is that if you **share** whatever you learn with the world then it tends to grow faster. Not only will your skills grow but how you feel about yourself and the world



will also change. That's the third leg of this learning tri-factor. You are learning, applying and also sharing your skills.

When it comes to sharing, there are many ways to share your skills. Not everyone can start a blog or podcast because it takes a lot of time and energy and you need to find the right audience to communicate. But, there are many ways in which you can share your knowledge without spending 6 hours per day. My favorite ways to share knowledge are to **join an Excel forum**. I run forum at <http://forum.chandoo.org/> and there are many other forums like Mr. Excel, Oz Grid etc. You can go and sign up on any of these forums and see the questions that others are asking and help them. When you are helping them, you are not only learning but you are also contributing and sharing your knowledge with the world which is a really good thing.

The other way to share your knowledge, if you don't have time for a forum or if you feel that it is too much and too impersonal, is by helping out a colleague. In your office or in your workplace itself, there are a lot of people who could use a little bit of Excel help. Go and volunteer and help them solve a work problem that they are having. When you are helping them, you are helping yourself because by talking about a particular function, charting technique or VBA with them, you are really doing a recap of those skills in your mind. So, you tend to remember them better and you tend to apply them better.

The other way to learn is that you could **comment on various popular blogs**. For example, we publish lots of articles on <http://chandoo.org/> every month sharing various Excel techniques and concepts and we also publish podcasts. So, every time that you see something like this, you can write a comment and share what you know. This is one easy way to share as there is no commitment. By sharing something there, you tend to memorise it and apply it better later on.

The last option to share is that you could **volunteer and conduct a training class in your company**. I know many of our readers and listeners do this. They often send me an email saying that they recently ran a course on beginner Excel for their company and it was really well received. So, you could also try something like that. It is a very uplifting and a wonderful experience to share what you know with a bunch of people and answer their questions. If you are feeling like how can you train others when you are yourself learning, don't feel like that. Even though you are learning some things, you already know certain things so you can always say that you are going to train them on certain aspects and that you don't know everything and that if they ask you a question, you may or may not be able to answer it. But, at least that question will give you inspiration to learn more. This is how even I run classes. When I go to a corporate or a live class, the very first thing that I tell my students is that I am here to learn as much as they are here to learn because I am always keeping my eyes and ears open for the questions they are asking and anytime that I don't know the answer, we all get into the learning mode and try to figure out a good way to solve the problem. This is how you can share your knowledge.



These are the 15 ways in which you can enhance your skills and become awesome in Excel in 2015 and really do great work in your job. Thank you so much for listening to this podcast. I hope you enjoyed these techniques. I will see you again next week with something more interesting and wonderful. Until then, stay awesome. Bye.