

Excel Basics

- This session provides a hands-on introduction to Excel.
- Participants will build skills progressively with time for practice.
- Goal: Learn basic Excel skills

Welcome

- Introductions and expectations
- What participants will be able to do by the end
- Walkthrough of:
 - - Ribbon & tabs
 - - Worksheets vs. workbooks
 - - Cells, ranges, columns, rows
 - - Quick Access Toolbar

What can you do with Excel

1. Manage Personal Finances

- Track monthly expenses
- Build a simple budget
- Monitor savings and retirement withdrawals
- Compare spending month-to-month
- Keep a list of recurring bills and due dates

2. Track Health & Wellness

- Medication schedules
- Blood pressure or glucose logs
- Exercise routines
- Doctor appointments and medical history
- Why it helps:
Excel makes patterns easy to spot — like changes in blood pressure over time.

3. Organize Household Information

- Home maintenance schedule
- Inventory of valuables for insurance
- Contact lists for family, doctors, and service providers
- Meal planning and grocery lists
- This is especially useful for staying on top of seasonal tasks or keeping everything in one place.

What can you do with Excel

4. Manage Hobbies

- Retirement is the perfect time to dive into hobbies, and Excel can support almost any of them:
- Gardening
- Planting calendar
- Watering schedule
- Seed inventory
- Travel
- Trip planning
- Packing lists
- Budgeting for vacations
- Genealogy
- Family tree data
- Historical timelines
- Research notes
- Crafting / DIY
- Project plans
- Supply lists
- Cost tracking

• 5. Volunteer or Community Work

Entering, Cleaning & Formatting Data

- Entering text, numbers, dates
- Autofill & Flash Fill
- Adjusting column/row size
- Basic formatting:
 - - Bold, color, alignment
 - - Number formats (currency, percent, date)
- Hands-on mini-exercise: format a messy dataset

Essential Formulas & Functions

- Cell references: Relative vs. absolute (A1 vs. \$A\$1)
- Core functions: SUM, AVERAGE, COUNT, MIN, MAX
- Error messages (e.g., #DIV/o!, #VALUE!)
- Hands-on practice: build a small budget or totals table

Tables & Sorting/Filtering

- Converting a range into a Table
- Benefits of Tables (auto-fill formulas, structured references)
- Sorting by one or multiple columns
- Filtering and using filter dropdowns
- Hands-on practice: clean and analyze a small dataset

Intro to Charts

- When to use charts
- Creating: Column chart, Line chart
- Customizing: Titles, labels, colors, Chart styles
- Hands-on practice: build a chart from sample data

Productivity Boosters

- Freeze panes
- Find & Replace
- Copy/paste tricks
- Keyboard shortcuts
- Quick analysis tool

Q&A + Wrap-Up

- Recap key skills
- Questions
- Suggest next steps:
 - - Conditional formatting
 - - PivotTables
 - - XLOOKUP