

Excel to Pivot Tables

in 8 weeks with Excel & Free Online Resources

Goal: Build working confidence with Formulas, Data structure & Pivot Tables

Weekly Routine (1 hour total video instruction & Excel): Watch 1-2 short videos (15-20 min total), then open Excel immediately after and try it out.

- Resource YouTube content from Kevin Stratvert, ExcelisFun, or Leila Gharani
- Open Excel > file > new & use templates like: Sales tracker | Budget | Expense report
- Modify the same file each week instead of creating new ones

Sanity Checks to Stay on Track

- Don't watch an entire video
- Instead: focus on just the topics specific to the weekly goal

Track: Things I learned each week & One thing I can now do faster.

Week 1: Getting Comfortable in Excel

Focus:

- Navigation
- Rows/columns
- Basic formatting

Practice: Open a Budget or Sales template in Excel and just explore

Success: you can confidently move around the spreadsheet, adjust formatting, & understand how rows/columns organize info.

Things I learned:

1 thing I can now do faster:

Week 2: Core Formulas

Focus:

- SUM
- AVERAGE
- COUNT

Practice: Add totals to your week 1 template

Success: you can enter basic formulas without copying step-by-step instructions & understand what the result represents.

Things I learned:

1 thing I can now do faster:

Week 3: IF Statements

Focus:

- IF logic
- Simple conditions

Practice: Create a "high/low" or "on track/off track" column to your week 1 template

Success: you understand how IF statements evaluate conditions, even if you still need examples to write the formula.

Things I learned:

1 thing I can now do faster:

Week 4: Lookups Made Simple

Focus:

- Pulling data from another table

Practice (choose one):

- Use a second worksheet to create a small reference table (for ex. category names, departments, or status labels), then use XLOOKUP or VLOOKUP to pull one value into your main sheet.
- If lookups feel overwhelming, try setting up the second table and practice identifying which column would be used to match data. Understanding the structure matters more than getting the formula correct.

Success: you understand why lookups are useful & how they connect two tables, even if you rely on examples or videos to complete the formula.

Things I learned:

1 thing I can now do faster:

Week 5: Pivot Tables

Focus:

- Rows
- Values
- Basic setup

Practice: Insert your first pivot table into your week 1 data.

Success: you can create a pivot table and recognize how fields move between Rows and Values (Milestone Moment!!)

Things I learned:

1 thing I can now do faster:

Week 6: Pivot Tables (Exploring Layouts)

Focus:

- Sorting
- Filtering
- Grouping

Practice: Change your pivot table layout several times to explore how different values affect the results.

Success: you can confidently adjust the pivot table layout and explain how those changes affect what you see.

Things I learned:

1 thing I can now do faster:

Week 7: Pivot Tables + Charts

Focus:

- Turning pivots into visuals

Practice: Add a chart to your pivot table and adjust how the data is displayed,

Success: you can create a pivot chart and understand how visuals help communicate insights.

Things I learned:

1 thing I can now do faster:

Week 8: Reinforcement

Focus:

- Repetition from a different instructor

Practice: Rebuild everything from scratch (HUGE MILESTONE!!)

Things I learned:

1 thing I can now do faster: