5 Microsoft Excel Tips to IMMEDIATELY Increase Your Productivity!

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Why this, why now, why Donna?

Mention Excel to some people and their eyes glaze over.

Mention it to others and they get excited!

Like it or not, Excel is an integral part of today's business world.

Maybe some are fearful because they were told they were never good at math at school, or are perhaps part of the generations not exposed to the commonplace technology of today, resulting in anxiety and stress.

In 2008 Australian company Medibank Private conducted a report on the Cost of Workplace Stress in Australia. In 2008 the cost to the Australian economy was $14.81 billion per year.[1]

As a productivity expert who focuses on technology, I see too many organisations putting pressure on their staff to get more done in less time but not providing them with the insights, skills or support they need to truly feel empowered to get their work done without stress, frustration or the need to take work home at night or weekends!

The result is increased absenteeism, presenteeism or worse, their most valuable asset, their people, leave their organisation in search of a less stressful or more supportive environment.

Harvard Business Review's Pulse Survey [2] suggests "... fostering new work habits and processes is critical in meeting the needs of the digital enterprise."

I think it is time that rather than trying to increase productivity by adding more, we need to start viewing what is needed in the workplace through the lens of context and instead leveraging what we already use to increase efficiency, and accuracy whilst reducing risk, stress and frustration.

In this short eBook, I hope I can help kick-start your journey to a more contemporary approach to Microsoft Excel.

Yours in productivity,

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1. Copying Worksheets

When I mention copying and pasting I metaphorically see those perceiving themselves as "more advanced" with Excel rolling their eyes expecting a lecture reminiscent of a school teacher telling students to click here, then there, but never actually understanding what or why they are doing something.

Reality is, sometimes with Excel we expect things to be complicated not simple. I've lost track of the number of times I have been shown the "long" way of how someone does something, only to show them a couple of quick steps that shaves minutes or even hours off the time it takes to do something.

Whilst a few minutes may not seem like much, on one task repeatedly undertaken, over the course of a year, this can add up to days of lost productivity that we assume is simply part of today's working life.

Copying worksheets is one tip that can literally save you hours of time!

Firstly, let's provide some context around how you might use this in a real life environment.

For example, you have the same data on multiple worksheets that represents a week or a month.

The layout is the same, it is just that the data for each period is separate. The most common example is an annual file with tabs that represent data such as sales etc for each month.

When you copy and paste the data from one sheet to another the formatting is often lost.

If you do this instead, your new worksheet ends up being an **exact** duplicate of the first one.

Here are the written steps:

To Copy a Worksheet

1. Click on the tab you want to duplicate
2. Hold down the Ctrl key and drag the tab to the right ..... you will see a small + sign
3. Let go of the mouse, then let go of the Ctrl key
4. Voila, a duplicated worksheet!

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2. Sending an Individual Worksheet.

Whilst working with an executive, he told me that when he needed to send one of his team a worksheet of their monthly sales, he saved the existing file with a new name, deleted all the tabs he didn't want them to see, saved it, then sent it.

When I showed him how to send the individual worksheet, without having to save it, it was a d'oh moment.

Sometimes we get so caught up in what we are doing that we make things harder than they need to be and we overlook the obvious.

Whilst the process of saving the file, removing unwanted tabs and then sending the email might have only taken a few minutes, doing it five or ten times, depending on the number of staff, could add up to a half hour or more each time they needed to send them data.

By using this technique , that changed from hours to minutes, reducing stress, frustration and risk and allowing the executive more time to focus on more important matters.

NOTE: This tip saves even MORE time if you are using Microsoft Outlook for your email!!!

Here are the written steps:

How to Send an Individual Worksheet

1. Right click on the tab you want to share

2. Select Move or Copy option

3. Check the Create a copy box

4. Click the drop arrow to the right of the current file name and choose (new book)

5. Click OK

6. Click the File tab and choose Share

7. Choose to attach the file as an Excel workbook or PDF

8. Type in the email address of the person you wish to sent it to

9. Click Send.

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3. Creating Quick Graphs

They say a picture is worth a thousand words.

Graphs can be particularly challenging, but with a few little tips, a visual representation of your Excel data can totally change how your reader understands and analyses the information you are presenting.

When I work with executives and their teams, this simple tip can save them hours of stress and frustration, particularly when they need to create a graph minutes before going into a client pitch or board meeting.

Whilst this tip will cover creating a simple graph, for one participant in a session it took two hours off the graphing process, EVERY SINGLE time she created a graph!

The key lies in LEVERAGING Excel to do the hard work of graph creation for you.

If the graph isn't what you want, it is often because the data isn't appropriately laid out to make it easy for Excel to create.

The graph is merely a reflection of your data.

Here are the written steps:

To create a quick and simple graph

1. Highlight (select) the data you want to graph (be sure to include any labels but don't include any totals as generally you will want the graph to compare say month by month or product by product)

2. Press the F11 key on the keyboard (note if you are on a laptop, depending on the brand or model, in order to access the F11 key you may need to combine it with a button with text such as FN on it).

Excel has now created a graph on a separate worksheet for you to create axis, data labels and titles as needed.

The graph can be moved back to appear beside your data

To do this

1. Click Move Chart,

2. Select Object in

3. From the drop list select the relevant worksheet, then click OK.

4. Global Changes

Many of the executives and teams I work with have spreadsheets where data is the same across multiple worksheets.

Whilst we covered a tip on how to easily duplicate worksheets including the formatting, at times there are changes that need to be made on every single worksheet.

If there is only one or two, that's easy, but if you have 10, 12 or more it can be time consuming.

The next tip enables you to make global changes in your worksheet to the **same cell** in every worksheet.

This has proved extremely useful for clients who want to duplicate a file for another team or division but don't want to have to go through and edit titles or names that are in the same cell on every worksheet.

NOTE: This tip enables you to edit or enter text into the same location on multiple worksheets at the same time.

Here are the written steps:

Let's just say I have a budget for a division of the company.

In cell A1 at the top of each of my 12 worksheets in the file is the heading Finance Department and I want to change it to Customer Service.

How to Make Global Changes in a File

1. Click on the first worksheet tab in the file

2. Hold down the Shift key and click on the last worksheet tab in the file (note if you can't see it on screen, use the right pointing arrows to navigate so you can see it)

3. At the top of the screen it should indicate the file name and in [Group]

4. This means your worksheets are now grouped. [Any changes you make to any cells will impact on that same cell on EVERY worksheet].

5. Click on cell A1 (in this example)

6. Edit or retype in Customer Service and press Enter

7. Ungroup the worksheets by right clicking on one of the tabs and choosing Ungroup.

You've now changed the contents of A1 in every single worksheet in this file.

5. Freeze Panes

When preparing to work with a firm of accountants I conducted our standard pre-session survey which enables us to customise programs to focus on the ideas and strategies that will enable those attending to fast track their productivity.

One of the questions I asked was "What is the 1 thing that if you knew it, understood it or felt it would make attending this session valuable to you?"

The response surprised me. The attendee simply wanted to know to Freeze Panes.

Which basically means how to "lock" the column or row headings in a spreadsheet to ensure when you view it on screen the labels at the top of a list continue to display as you scroll down.

Now this attendee could have easily gone to Google or YouTube for the answer, but they had so much to do that they hadn't found the time.

NOTE: This tip is particularly useful if you are like a lot of the organisations I work with who are analysing and manipulating large volumes of data.

 Here are the written steps:

How to Freeze Panes

1. Click on the first cell below the column heading and to the right of the row heading (this might be B2 if your headings are in row 1 and column A)

2. Click the View tab and choose Freeze Panes

3. Select Freeze Panes to "lock" the spreadsheet with data above and to the left of your current cell "locked".

NOTE: Click Freeze Top Row if you want to freeze ONLY the top row (row 1) of your spreadsheet, Click Freeze First Column if you want to freeze ONLY the first column (column A) of your spreadsheet.

NOTE: If you Freeze Panes and then save the file, next time you open the file the panes will still be frozen.

As you scroll down the spreadsheet you will notice the relevant headings DO NOT move.

To remove the frozen panes

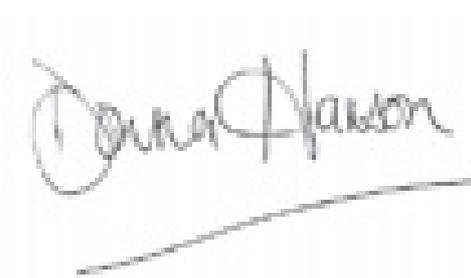1. Return to the View tab

2. Choose Unfreeze Panes.

What's Next?

Want to take your Microsoft Excel journey further?

Enrol in my self paced program Data Analysis in Microsoft Excel Simplified - find out more here.

Use the code 5ME to get $50 discount!

I hope you found this ebook valuable.

Let's keep in touch!

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References

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