

# Sales Manager's Cheat Sheet: How to Become an Excel Ninja



## The 6 Steps to Mastering Sales Analysis in Excel

1. **Ditch the mouse** – It may slow you down initially, but forcing yourself to use keyboard shortcuts will ultimately save you tons of time.
2. **Get to know the formatting window** – Want to change a file's font, alignment or borders? Type Ctrl+1 to open the formatting window.
3. **Master "text-to-columns"** – Trying to alphabetize a list of leads that have first and last names bundled together? Learn this function.
4. **Utilize Shift+Ctrl functions** – Want to change a number to a percent? Shift+Ctrl+5. Add a dollar sign? Shift+Ctrl+4. And that's just 2 – try all 10!
5. **Customize your quick-access toolbar** – Make the toolbar your own greatest hits repository by right clicking and adding your favorite functions.
6. **Perfect the PivotTable** – These interactive tables will help you analyze sales data, compare opportunities, detect patterns and discover trends.

## The Best Formulas for Sales Managers

Formula	Use	Notes
<b>VLOOKUP</b>	Look up a value in one column and find a corresponding value in another	Perfect for comparing objects from different ATS/CRM reports
<b>SUMIF</b>	Add up all values in a range the meet specified criteria	Use this to sum values conditionally (ex. placements this month)
<b>COUNTIF</b>	Count cells in a range that meet specified criteria	Want to count all of the job orders in a stage? Use this.
<b>MATCH</b>	Find specified value in an array	Looking for a single job order or candidate? Use match.

## 10 Essential Keyboard Shortcuts

Shortcut	Function
<b>Alt+=</b>	Auto sum whatever series of data you're near
<b>F4</b>	Lock a formula in a cell
<b>Ctrl+Space</b>	Select entire column (shift+space for entire row)
<b>Shift+Ctrl+Plus</b>	Add new cell, row or column
<b>Ctrl+Pg Up</b>	Move to next tab in your workbook
<b>Ctrl+Pg Down</b>	Move to previous tab
<b>Shift+F2</b>	Add comment
<b>Ctrl+H</b>	Find and Replace
<b>Alt+W+Q</b>	Zoom/adjust sizing
<b>Shift+Ctrl+minus</b>	Delete a cell, row or column