

Sales Manager's Cheat Sheet for Becoming an **Excel** Ninja

The 6 Steps to Mastering Pipeline 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 |
|----------------|---|---|
| VLOOKUP | Look up a value in one column and find a corresponding value in another | Perfect for comparing objects from different SFDC reports |
| SUMIF | Add up all values in a range the meet specified criteria | Use this to sum values conditionally, like all Won Deals |
| COUNTIF | Count cells in a range that meet specified criteria | Want to count all of the opportunities in a stage? Use this |
| MATCH | Find specified value in an array | Looking for a single opportunity or lead? Use Match. |

10 Essential Keyboard Shortcuts

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

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