

CPE Today · 2027 K2 Technology Conferences

Excel Overdrive: Models, Automation, and Getting Out of the Grid

Excel - Fall Conference

December 15, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

Most Excel users rely on a small slice of what the program can do, and their workbooks show it: helper columns, nested lookups that stop scaling, and the same steps repeated by hand every period. This conference covers the next level. It opens with the PivotTable features many users never touch, including grouping, calculated fields, value settings, slicers, and GETPIVOTDATA. It closes with how AI changes the way practitioners work in Excel.

Sessions cover the Data Model, Power Pivot, and DAX, using relationships instead of lookups and measures instead of helper columns for volumes that break a normal sheet. You will learn to record, edit, and schedule repetitive work with Office Scripts and Power Automate, apply Scenario Manager, Data Tables, and Goal Seek to pricing, financing, and capacity decisions, and project revenue and headcount with FORECAST.ETS, trendlines, and moving averages while recognizing the limits of each. The program also covers chart selection and formatting for board decks, and co-authoring, sheet protection, and version control when several people work in one model. You will earn credits in Computer Software and Applications.

Who Should Attend

- Accountants and analysts comfortable with Excel basics who want to build larger, more automated models.
- Finance professionals whose workbooks have outgrown lookups and helper columns.
- Controllers and managers who present financial results to boards and leadership.
- CPAs who want 8 CPE credits in Computer Software and Applications.

What You'll Take Away

- Use grouping, calculated fields, value settings, slicers, and GETPIVOTDATA to get more from PivotTables.
- Replace lookups and helper columns with Data Model relationships and DAX measures.
- Automate repetitive workbook tasks with Office Scripts and scheduled Power Automate flows.
- Apply Scenario Manager, Data Tables, and Goal Seek to pricing, financing, and capacity decisions.
- Build revenue and headcount forecasts with FORECAST.ETS and moving averages, and judge their limits.
- Format charts for board decks and protect shared workbooks during co-authoring.

Proposed Agenda

Day One

8:00 AM – 9:40 AM — **PivotTables You Thought You Knew**

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Covers grouping, calculated fields, value settings, slicers, and GETPIVOTDATA.

- Identify methods to group date and numeric fields to create meaningful time-series and distribution analyses.
- Apply custom calculations within PivotTables using calculated fields and items to maintain data integrity.
- Configure value field settings to show percentages and running totals for deeper comparative analysis.
- Construct interactive reporting interfaces using slicers and timelines to improve user engagement.

Prerequisites: Basic familiarity with creating standard Excel PivotTables and working with tabular data sets. · Advance preparation: None

9:40 AM – 9:50 AM — Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 2 SESSIONS

The Data Model, Power Pivot, and DAX

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Covers relationships instead of lookups, measures instead of helper columns, and handling volumes that break a normal sheet where XLOOKUP stops scaling.

- Identify the benefits of using the Excel Data Model over traditional flat-file spreadsheets.
- Differentiate between physical helper columns and DAX measures for calculating business metrics.
- Establish relationships between multiple tables to replace nested lookup functions.
- Apply basic DAX syntax to create portable calculations that adapt to different PivotTable layouts.

Prerequisites: A working knowledge of standard PivotTables and the XLOOKUP function. · Advance preparation: None

Automation Inside Excel: Office Scripts and Power Automate

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Focuses on recording, editing, and scheduling repetitive work using TypeScript basics and trigger logic.

- Identify the core differences between traditional VBA macros and modern Office Scripts.
- Record a sequence of formatting and data manipulation steps using the Action Recorder.
- Modify basic TypeScript parameters within an Office Script to handle variable data lengths.
- Construct a Power Automate flow that triggers an Office Script based on a specific schedule or event.

Prerequisites: A working knowledge of Excel tables and basic logic functions like IF and AND. · Advance preparation: None

11:30 AM – 12:20 PM Lunch

12:20 PM – 1:10 PM

CHOOSE ONE OF 2 SESSIONS

What-If Analysis: Scenario Manager, Data Tables, and Goal Seek

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Explores built-in tools applied to pricing, financing, and capacity decisions.

- Identify the appropriate what-if analysis tool for specific business problems like pricing or loan terms.
- Construct a one-variable and two-variable data table to perform sensitivity analysis on a financial model.
- Create and compare multiple business cases using Scenario Manager to evaluate potential outcomes.
- Apply Goal Seek to determine the necessary input values required to achieve a specific financial target.

Prerequisites: A solid understanding of basic Excel formulas, cell referencing, and financial functions. · Advance preparation: Participants should have a practice workbook ready with basic financial formulas for pricing and loan calculations.

Forecasting in Excel

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Covers FORECAST.ETS, trendlines, and moving averages for revenue and headcount projections, plus the honest limits of each.

- Identify the appropriate scenarios for using linear versus exponential smoothing forecasting methods.
- Apply the FORECAST.ETS function to historical data sets that exhibit seasonal patterns.
- Calculate moving averages to identify underlying trends in volatile financial information.
- Evaluate the reliability of a forecast using confidence intervals and trendline R-squared values.

Prerequisites: Familiarity with standard Excel formulas and basic chart creation. · Advance preparation: None

1:10 PM – 1:20 PM Break

1:20 PM – 2:10 PM CHOOSE ONE OF 2 SESSIONS

Charts That Make the Point

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Covers chart selection, combo charts, secondary axes, and formatting for board decks.

- Identify the most effective chart type based on the specific financial story the data needs to tell.
- Construct combo charts that integrate different data scales using secondary axes without misleading the audience.
- Apply professional formatting standards to remove chart clutter and emphasize key performance indicators in board-level presentations.
- Evaluate whether an existing chart communicates its financial insight clearly enough to support a board decision.

Prerequisites: A working knowledge of basic Excel chart creation and data entry. · Advance preparation: None

Sharing and Collaboration Without Chaos

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Covers co-authoring, sheet protection, and version control when multiple people touch the model.

- Identify the technical requirements and limitations for real-time co-authoring in Excel.
- Apply protection settings to specific ranges and sheets to prevent unauthorized formula changes.
- Utilize version history and track changes to audit or revert workbook modifications.
- Implement best practices for naming conventions and folder structures to improve team workflow.

Prerequisites: Familiarity with Excel workbook sharing and basic cell referencing. · Advance preparation: None

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

Excel + AI - A Powerhouse Combo

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A few years ago, the idea of talking to a spreadsheet felt like science fiction. Today, it is a core part of the professional toolkit. This closing keynote looks at how artificial intelligence changes the way practitioners interact with the grid. The session begins with a look at the practical reality of Copilot, moving beyond the marketing promises to show how it actually handles data cleaning and analysis. From...

- Identify the specific capabilities and limitations of Copilot when performing data transformations within the Excel interface.
- Explain how Python in Excel enables advanced data analysis and visualization beyond standard spreadsheet functions.
- Apply validation techniques to verify the logic and accuracy of formulas generated by artificial intelligence models.
- Determine the appropriate scenarios for using AI tools versus traditional manual spreadsheet methods to maintain data integrity.

Prerequisites: Participants should have a functional understanding of Excel formulas and basic data management concepts. · Advance preparation: None

All times Central Time. Proposed agenda — sessions, times and credits may change before the conference. Registration details, final credits and NASBA disclosures are published on the conference page.
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