

EXCEL OVERDRIVE: MODELS, AUTOMATION, AND GETTING OUT OF THE GRID



● CPE Today • 2027 K2 Technology Conferences

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

Excel - Fall Conference

December 15, 2027

Live online • Central Time

8 CPE

Credits, proposed

1 day

Group Internet Based

Proposed Agenda

Day One

8:00 AM – 9:40 AM

PivotTables You Thought You Knew

Computer Software and Applications · Intermediate · 2 CPE

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

Computer Software and Applications · Intermediate · 2 CPE

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

Computer Software and Applications · Intermediate · 1 CPE

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

Computer Software and Applications · Intermediate · 1 CPE

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.

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

Sharing and Collaboration Without Chaos

Computer Software and Applications · Intermediate · 1 CPE

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.

<https://www.cpetoday.com/conferences/2027/excel-overdrive>