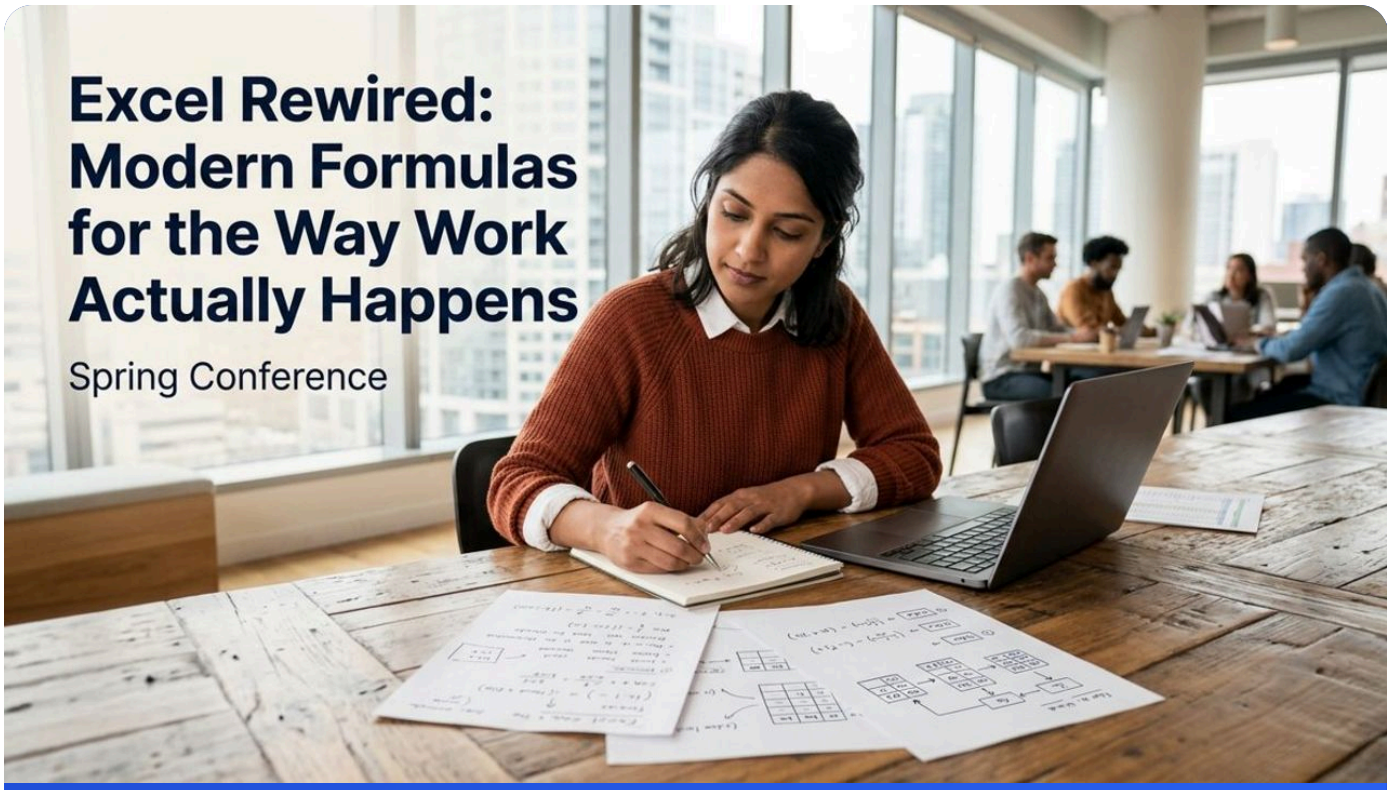


CPE Today · 2027 K2 Technology Conferences

Excel Rewired: Modern Formulas for the Way Work Actually Happens

Excel - Spring Conference

June 2, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

The Excel formula engine has changed, rendering many legacy habits and lookup methods obsolete. This conference addresses the shift from static grids to dynamic, self-resizing reports. You will learn to use new functions like LET, LAMBDA, and XLOOKUP to build more efficient models. The curriculum focuses on two tracks: Formulas and Structure, and Data and Integrity.

In the Data and Integrity track, you will learn to use Power Query to automate the cleaning of client exports and how to apply structured references to improve file stability. The program also covers auditing techniques to find broken cells in large workbooks and error-handling discipline using IFERROR. In the Formulas and Structure track, you will apply dynamic arrays to accounting schedules and allocations. The day concludes with design principles for workbook protection and documentation, ensuring your files remain functional after they are handed off to other users. You will earn credits in Computer Software and Applications, Accounting, and Audit.

Who Should Attend

- CPAs who need to earn 8 CPE credits across Software, Accounting, and Audit fields.
- Finance professionals managing legacy spreadsheets that rely on manual copy-down formulas.
- Controllers responsible for the integrity and auditing of complex financial models.
- Accountants who spend significant time manually cleaning and formatting client data exports.

What You'll Take Away

- Replace VLOOKUP with XLOOKUP and XMATCH to create more resilient links.
- Automate data cleaning using Power Query to unpivot and merge monthly exports.
- Build self-resizing accounting schedules using FILTER, SORT, and UNIQUE functions.
- Apply formula-driven conditional formatting to flag variances and reconciliation errors.
- Trace precedents and use auditing tools to locate errors across multi-tab workbooks.
- Separate input, calculation, and output layers to improve workbook durability.

Proposed Agenda

Day One

8:00 AM – 9:40 AM

Excel Isn't What It Was

Computer Software and Applications · Intermediate · 2 CPE

The modern formula engine changed what a good spreadsheet looks like, including dynamic arrays, LET, LAMBDA, and the shift from copy-down grids to formulas that spill. Learn what to unlearn and how to spot legacy habits in your own files.

- Identify legacy spreadsheet habits that create unnecessary risk and manual effort in modern workbooks.
- Distinguish between the traditional grid-based calculation model and the modern dynamic array engine.
- Determine when to replace manual 'copy-down' formulas with spilling array logic to improve model integrity.
- Explain the role of the LET function in documenting logic and improving calculation performance.

Prerequisites: A working knowledge of traditional Excel functions like VLOOKUP and basic logical statements. · Advance preparation: Participants should update their version of Microsoft 365 to ensure access to the latest formula engine features.

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 2 SESSIONS

Dynamic Arrays in Practice

Accounting · Intermediate · 2 CPE

FILTER, SORT, UNIQUE, SEQUENCE, and TEXTSPLIT applied to real accounting work such as dynamic schedules, allocation tables, and reports that resize themselves.

- Apply the FILTER and SORT functions to create automated schedules that update as source data changes.
- Implement the UNIQUE and SEQUENCE functions to build dynamic row and column headers for allocation tables.
- Utilize TEXTSPLIT to clean and organize concatenated data strings common in system exports.
- Construct spilled range references to ensure downstream calculations adjust to changing data volumes.

Prerequisites: A working knowledge of basic Excel functions and experience building multi-sheet workbooks. · Advance preparation: Participants should ensure their version of Excel supports dynamic array functions like FILTER and UNIQUE.

Power Query: Cleaning What Clients Send You

Computer Software and Applications · Intermediate · 2 CPE

Import, unpivot, merge, append, and refresh to turn the monthly export mess into a repeatable ten-second process.

- Import monthly client exports into Power Query.
- Apply unpivot transformations to turn crosstab reports into usable tables.
- Combine data sources using merge and append queries.
- Build a refreshable query that repeats the cleanup on each new export.

Prerequisites: A working knowledge of Excel tables and basic formulas. · Advance preparation: None

11:30 AM – 12:20 PM

Lunch

12:20 PM – 1:10 PM

CHOOSE ONE OF 2 SESSIONS

Lookups That Don't Break

Computer Software and Applications · Intermediate · 1 CPE

XLOOKUP, XMATCH, and why the VLOOKUP habits still in your files are a liability.

- Identify the structural limitations and common failure points of VLOOKUP and HLOOKUP in legacy workbooks.
- Apply XLOOKUP to replace traditional lookup and reference functions while improving formula readability.
- Implement XMATCH to perform flexible searches and approximate matches without the risks of sorted data requirements.
- Construct horizontal and vertical lookups that remain functional even when columns or rows are added to the source data.

Prerequisites: A working knowledge of VLOOKUP and basic formula construction in Microsoft Excel. · Advance preparation: Participants should ensure their version of Excel supports XLOOKUP and XMATCH before the session.

Tables, Names, and Structured References

Computer Software and Applications · Intermediate · 1 CPE

The structural layer most people skip, and what it buys you.

- Identify the limitations of standard cell references in growing datasets.
- Apply Excel Table structures to automate range expansion for formulas.
- Construct structured references that improve formula readability and auditability.
- Implement named ranges to define key variables and constants across a workbook.

Prerequisites: Familiarity with standard Excel formulas and basic range selection. · Advance preparation: None

1:10 PM – 1:20 PM Break

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

Conditional Formatting Beyond the Presets

Computer Software and Applications · Intermediate · 1 CPE

Formula-driven rules for exception flagging, variance highlighting, and reconciliation.

- Write formula-driven conditional formatting rules that go beyond the built-in presets.
- Apply rules that flag exceptions in transaction data.
- Design rules that highlight variances in financial schedules.
- Apply conditional formatting to support account reconciliation.

Prerequisites: Experience writing Excel formulas with relative and absolute references. · Advance preparation: None

Error Handling and Auditing

Audit · Intermediate · 1 CPE

Tracing precedents, IFERROR discipline, and finding the broken cell in a 40-tab workbook.

- Identify the root causes of common Excel error codes and their impact on workbook integrity.
- Apply formula auditing tools to trace data relationships across multiple worksheets.
- Implement error-handling functions like IFERROR and ISERROR to manage data gaps without masking critical failures.
- Develop a structured diagnostic workflow to locate and repair broken links in large-scale files.

Prerequisites: Familiarity with writing basic Excel formulas and a working knowledge of multi-sheet workbook structures. · Advance preparation: None

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

The Workbook Nobody Can Break

Computer Software and Applications · Intermediate · 2 CPE

Design principles for files that survive handoff: separating input, calculation, and output; documentation that lives in the file; validation and protection; version practice.

- Identify the core structural flaws that lead to workbook corruption and formula errors.
- Implement a three-tier architecture to isolate data inputs from calculation logic and final reporting.
- Apply data validation rules and worksheet protection to prevent unauthorized structural changes.
- Construct internal documentation systems that explain workbook logic to future users.

Prerequisites: Familiarity with Microsoft Excel including basic formulas and data entry. · 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-rewired