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CHECKLIST

Excel Training Prep Checklist · 30-Minute Planning Guide for Team Sessions

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LICENSE	Free for personal and team use

> Most Excel training fails for the same reason: the prep work didn't happen. The instructor walks in cold, the team's expectations weren't set, no one reserved time for follow-up practice, and a week later half the room can't remember what a SUMIFS does. This checklist is the prep I run before every Excel session I deliver — twenty-two short questions across four phases, completable in about thirty minutes by whoever owns the training internally.

What's inside

- **22 questions** across four phases (Pre-Session, Day-Of, Live Session, Week-After)
- Single-page PDF, printable on letter or A4 — designed to live on a clipboard, not a screen
- One blank field per question for handwritten answers

- Quick-reference appendix on the back: the 12 Excel functions your team will use 80% of the time
- A "post-training week" template — the missing piece in every training plan I've ever audited

Who it's for

Operations leads, L&D coordinators, and team managers who are about to run an internal Excel session — whether you're delivering it yourself or bringing in an external trainer. Especially useful if this is the first formal Excel session your team has done; the checklist forces the questions you didn't know to ask.

How to use it

1. **Download** the PDF and print one copy.
2. **Walk through it twice** — once two weeks before the session (Pre-Session phase), once the morning of (Day-Of phase). Each pass takes ten to fifteen minutes.
3. **Keep it visible** during the session itself — the Live Session phase has six prompts that are easy to forget once you're in the room.

The checklist is generic enough to work for any Excel topic (pivot tables, lookup functions, dashboards, Power Query) and any audience size from three to thirty.

Why the post-training week matters most

One week of deliberate practice drives better outcomes than three weeks of training that nobody applies. The checklist's last phase covers what to schedule, what to practise, and what to measure in the week after a session — the part of training plans that almost always gets dropped because "we'll figure it out after." We won't. Plan it before the session, not after.

File details

- **Version:** 1.0 (December 2025)
- **Format:** PDF, single page front + appendix back
- **Page size:** Letter and A4 versions both included in the .zip
- **License:** Free for personal and team use; please don't repackage and resell

Other downloads from this practice

- Content Planning Template (/downloads/content-planning-template-service-businesses/). A planning template for service businesses sizing a quarterly content effort.
- WordPress Site Launch Checklist (/downloads/wordpress-pre-launch-checklist/). The pre-launch checklist that catches what most launches miss.
- Before the Excel Training Starts: What Most Teams Miss (/excel-training-team-preparation/). The longer post on what preparation actually changes about a training outcome.

WANT HELP APPLYING THIS?

If you'd like a second pair of eyes on what you turn up

Send me a note about what you're working on and I'll send back what I'd try first. Booking a call is optional. The form is the path; the call is only if a call would actually help.

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