HOW TO GET YOUR BOSS TO APPROVE EXCEL TRAINING

A quick guide for talking to leadership about workflow improvement

1. Clarify why training matters

Focus on team-level benefits rather than personal interest.

Ask yourself:

- What reporting or data tasks take too long?
- Where do errors or rework happen repeatedly?
- How would the team's output improve with better workflows?

2. Use free resources wisely

Free courses are great for exploration but not always enough for mission-critical work.

Questions to discuss with your boss:

- Are people completing the free modules in a way that supports real tasks?
- Which lessons translate well into our actual workflows?
- Where are the gaps that still create bottlenecks or confusion?

3. Frame training in terms of ROI

Leaders need to connect training to outcomes, not just cost.

Try questions like:

- What level of efficiency improvement would make this worthwhile?
- Which workflows would benefit most from even small time savings?
- Should we estimate time lost to manual cleanup or errors each month?

Even a 1 percent productivity gain often pays for training immediately.

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4. Use workload pressure as a signal

If the team feels too busy for training, that is often the clearest sign that training is needed.

Ask your boss:

- Which recurring tasks always feel rushed or error-prone?
- If we streamlined one or two processes, how would that affect workload?
- Could a short, targeted session relieve some of the pressure?

Training does not take time away from work. It creates breathing room.

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5. Highlight the difference between basic Excel and modern Excel

Many people know formulas and PivotTables. Fewer know Power Query, Power Pivot, dynamic arrays, automation, or AI-driven tools.

Clarifying questions:

- Are we rebuilding the same reports each month?
- Are we cleaning data by hand when automation could handle it?
- Do people spend more time fixing spreadsheets than analyzing results?

Modern Excel removes busywork and reduces risk.

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6. Make value measurable

Suggest a simple before-and-after pilot.

Steps:

1. Pick one recurring workflow.
2. Track how long it takes today.
3. Complete a focused training session.
4. Measure again in a few weeks.

Questions to ask:

- Which task would make a good pilot?
- Should we track time saved, fewer errors, or improved turnaround?

A measurable pilot builds confidence and earns trust.

7. Use a simple, professional script

Here is a template you can adapt:

"I have been reviewing our reporting and data cleanup process and see opportunities to work more efficiently. A short, targeted Excel session tailored to our actual workflows could make a meaningful difference. Would you be open to a ninety-minute pilot to see whether it improves our process? If it works, great. If not, we can leave it there."

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8. When you are ready, bring me in

Whether you need help shaping your pitch, want backup, or have already convinced your boss...

Book a consult call at:
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I will help you refine your case, talk with leadership, and design a training plan that gets your team real results.