

rocket matter

**Microsoft 365 Series
Crash Course in Excel for Legal
Professionals**



Using Excel since the 90's!

Larry Port, CEO and Co-Founder of Rocket Matter. Co-Founder of LexCharge.

Worked with thousands of law firms.
Author, writer, speaker on law firm efficiency.

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Why spend time learning Excel?

- Work quickly with numbers
- Grow your practice
- Gain insights quickly



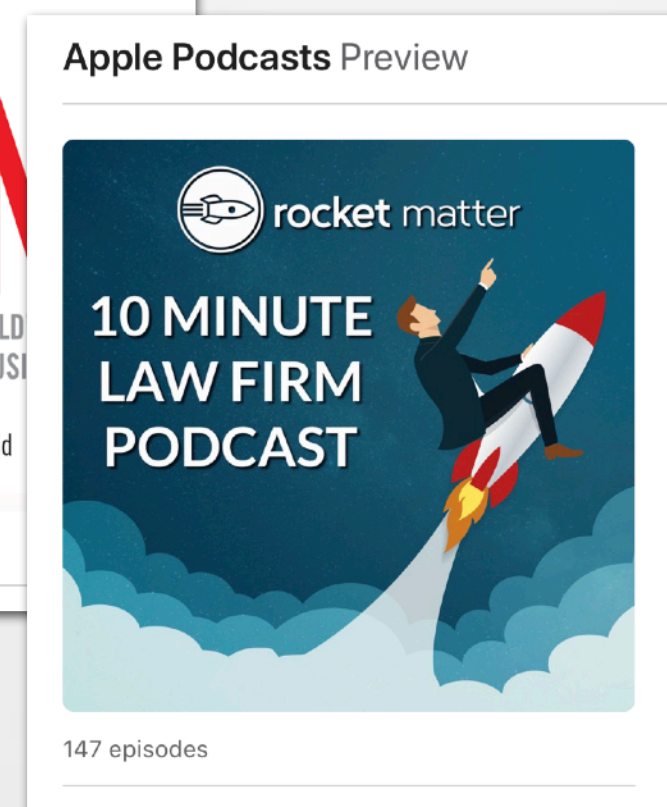
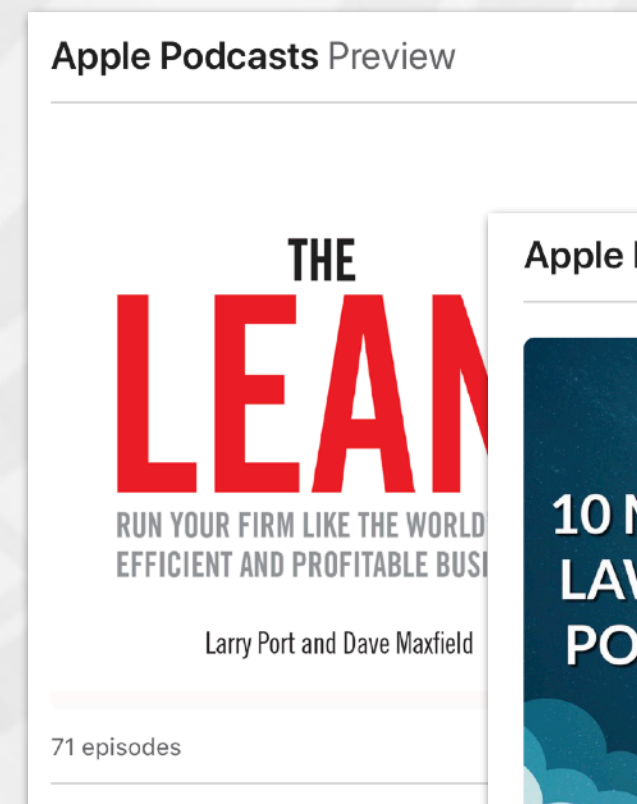
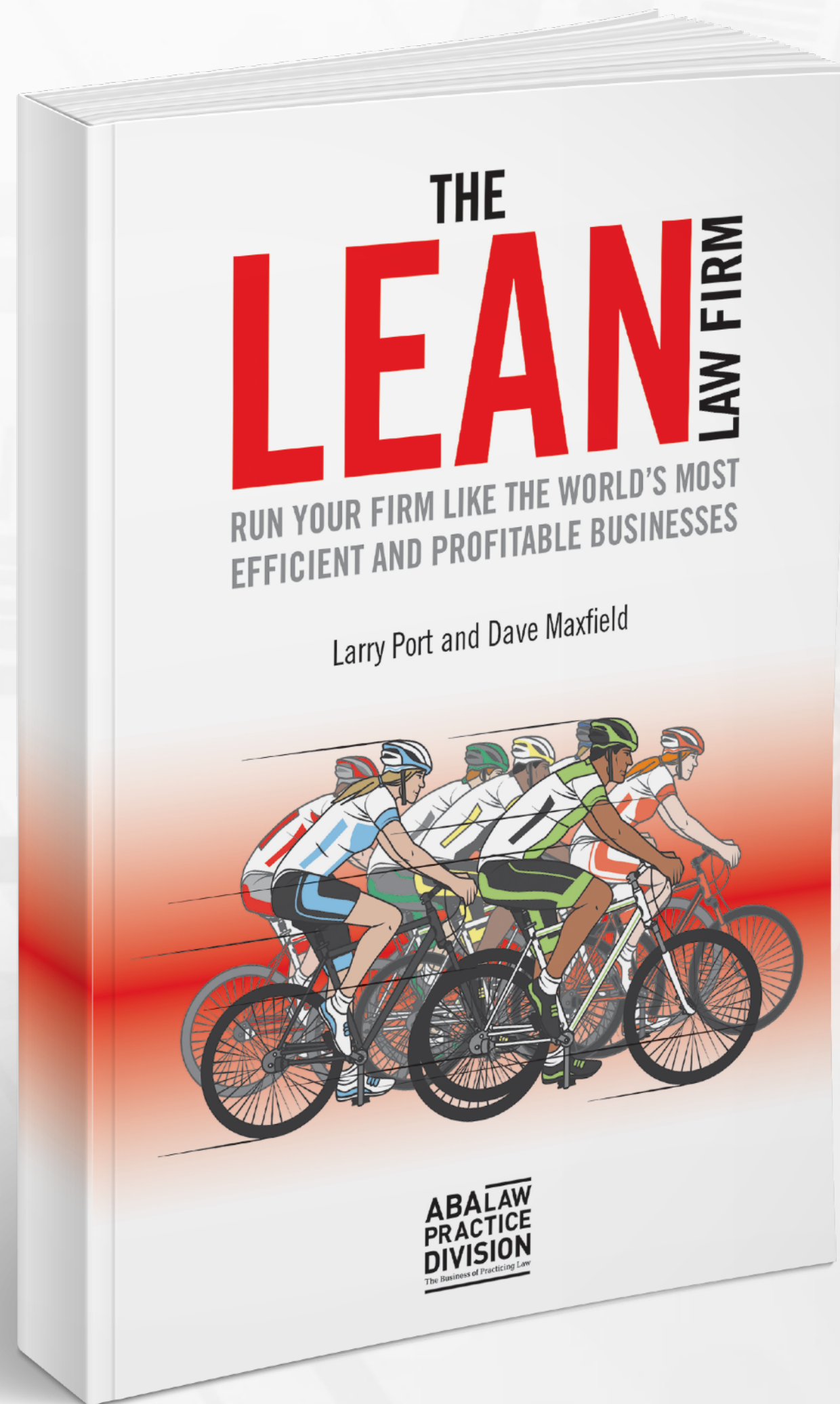
This may terrify you now...

=VLOOKUP (H2 , \$B\$13 : \$C\$15 , 2 , FALSE)

...but by the end you'll get it!

Thought Leadership

Rocket Matter's content marketing and thought leadership combines deep expertise, creativity, and wit. CEO Larry Port is a widely-known speaker and author, performing dozens of live CLEs and producing more than one hundred pieces of content each year.



10 Minute Law Firm and
Lean Law Firm Podcasts



Infographics and eBooks



CLE Webinar Series in conjunction
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The Lean Law Firm

Run Your Firm Like the World's Most Efficient and Profitable Businesses

By: [Larry Port, Dave Maxfield](#)
Narrated by: [Eric Deuser](#)
Length: 7 hrs and 38 mins
Unabridged Audiobook
Release date: 12-16-20
Language: English
Publisher: [Larry Port and Dave Maxfield](#)

Webinar Promotion

Sign up for Rocket Matter before April 1 and get:

2 Free Months

of Rocket Matter!

www.rocketmatter.com/365webinar

Free Training in 30 Minutes or Less

Webinar Schedule

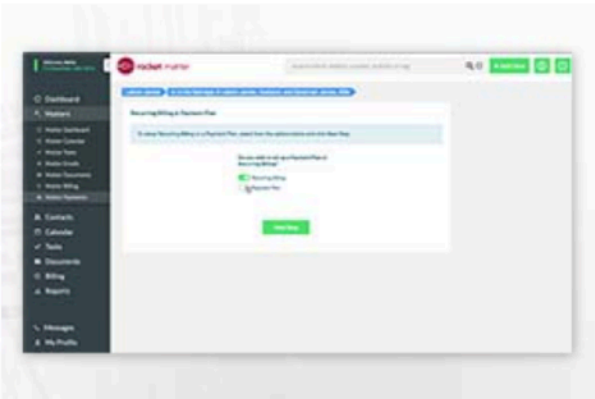
Click on a class to sign up and enjoy one of our fun, quick, and helpful webinars!

| Times | Monday | Tuesday | Wednesday | Thursday | Friday |
|-------------|------------|--|-----------------------|------------------------------|----------------------------------|
| 11:30am EST | Rocket 101 | Matter Templates, Calendaring, and Tasks | LEDES Billing | Document & Invoice Templates | Rocket Project Management Part 1 |
| 3:30pm EST | Lexcharge | Billing, Invoicing, and Trust Accounting | Rocket Essentials 101 | Business Intelligence | Rocket Project Management Part 2 |

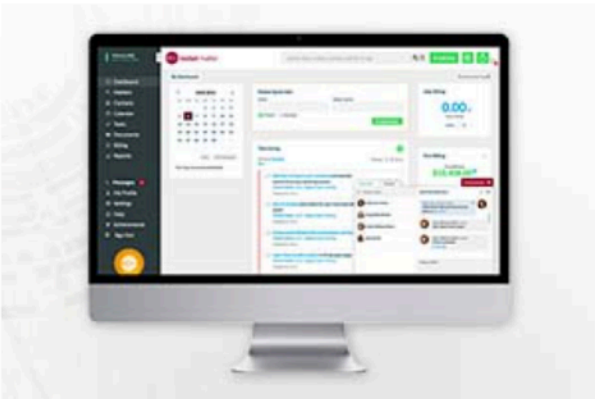
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On-Demand Training



Feature Overviews



Short How-To's



Microsoft 365 Plans

Microsoft 365 Business Basic

\$5.00 user/month
(annual commitment)

[Get started](#)

Try free for 1 month⁴

Best for businesses that need easy remote solutions, with Microsoft Teams, secure cloud storage, and Office Online (desktop versions not included).

Microsoft 365 Business Standard

\$12.50 user/month
(annual commitment)

[Get started](#)

Try free for 1 month⁴

Best for businesses that need full remote work and collaboration tools including Microsoft Teams, secure cloud storage, business email, and premium Office applications across devices.

Microsoft 365 Business Premium

\$20.00 user/month
(annual commitment)

[Get started](#)

Try free for 1 month⁴

Best for businesses that require secure, remote work solutions with everything included in Business Standard, plus advanced cyberthreat protection and device management.

Only includes apps

Microsoft 365 Apps

\$8.25 user/month
(annual commitment)

[Get started](#)

Try free for 1 month⁴

Best for businesses that need Office apps across devices and cloud file storage. Business email and Microsoft Teams not included.

Office

Search

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LP

Home

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Microsoft 365


Tips and Tricks


Add-Ins →


Bookings
Simplify how you schedule and manage a...


Excel
Discover and connect to data, model and ...


MyAnalytics
Create better work habits with insights int...


People
Organize your contact info for all your frie...


PowerPoint
Design professional presentations.


Sway
Create and share interactive reports, prese...


Word
Bring out your best writing.


Calendar
Schedule and share meeting and event tim...


Forms
Create surveys, quizzes, and polls and easil...


OneDrive
Store, access, and share your files in one pl...


Planner
Create plans, organize and assign tasks, sh...


Project
Develop project plans, assign tasks, track ...


Teams
The customizable, chat-based team works...


Yammer
Connect with coworkers and classmates, s...


Delve
Get personal insights and relevant informa...


Kaizala
A simple and secure mobile chat app for w...


OneNote
Capture and organize your notes across all...


Power Apps
Build mobile and web apps with the data y...


SharePoint
Share and manage content, knowledge, an...


To Do
Keep track of your tasks in one place with i...


Dynamics 365
Break down the silos between your busine...

Lists
Allows users to create, share, and track dat...

Outlook
Business-class email through a rich and fa...

Power Automate
Create workflows between your apps, files,...

Stream
Share videos of classes, meetings, present...

Whiteboard
Ideate and collaborate on a freeform canv...

Tips and Tricks

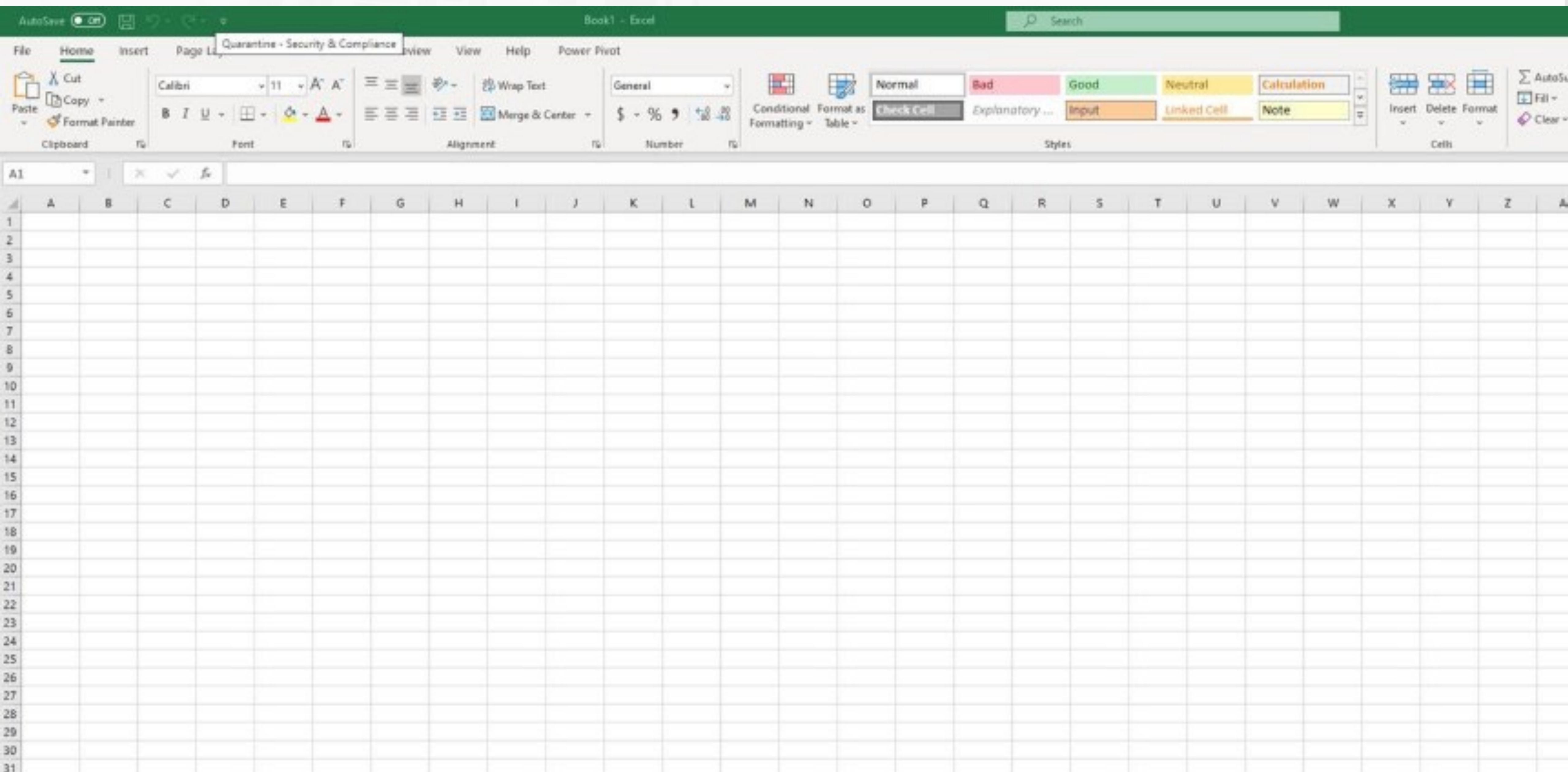


Excel

- Column Width Adjustments
- References
- Anchoring Cells
- Ranges
- SUMS, AVERAGE, MAX
- IFS
- VLOOKUP



Excel for Mac vs Online vs Windows



References

B12 - Refers to value in cell B12 and will move when copied and pasted.

\$B\$12 - Will ALWAYS refer to the value in B12

B\$12 - Will ALWAYS refer to row 12, but column may change.

\$B12 - Will ALWAYS refer to column B, but row may change.

Ranges

B12 : C24

IF

What if you have a condition
that decides what value a cell
should contain?

IF

=IF (condition, value if true, value if false)

=IF (H2 < 1500, "not at target", "target")

VLOOKUP

What if you need to lookup a
value in a table?

VLOOKUP

=VLOOKUP (lookup value, table
range, lookup column,
approximate match)

=VLOOKUP (H2, \$B\$13 : \$C\$15, 2,
FALSE)

CSV files

CSV = comma separated
values

.CSV vs .xlsx?

Using a Browser

Be aware of memory implications if you're using Microsoft 365 in a browser.



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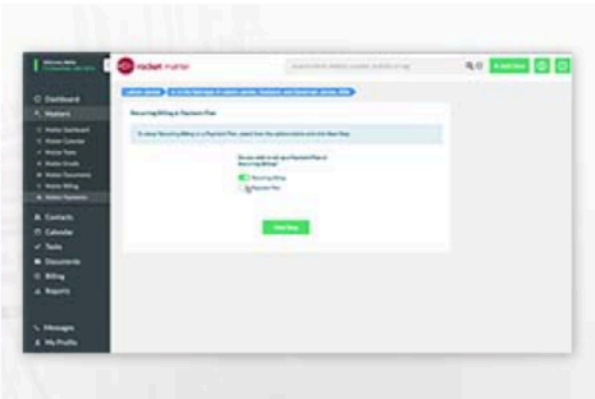
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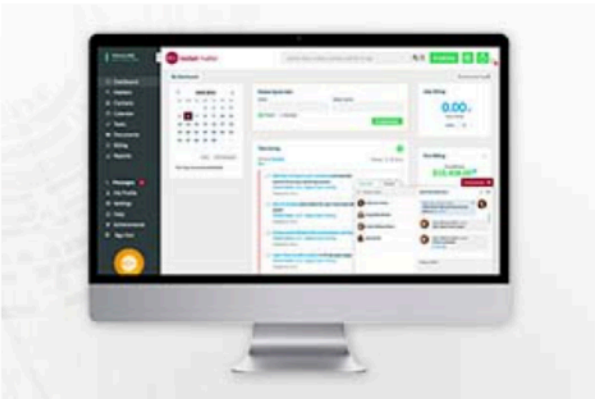
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Thank You!

CLE#4657

1 hr General + 1 hr Technology

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