Score Tracking Template
Training Script

Storyboard Scene	Script	Actions
2 (0:01:30)	Hi, I'm so glad you've found my site and are reviewing this project I put together. You already know I'm Daisy Urso, but repeating it helps you remember it, right? I've been in training for about 8 years full time, with lots of one-off training experiences before that. My roles have been in the financial services industry, both consumer banking and investments. I am passionate about helping people grow and develop, and I also know how important it is to bring financial education to everyone. Money is something we all think about, and often! I made this spreadsheet in an earlier role, where I was coaching people who were studying for the Series 7 Top-Off exam offered by FINRA. This is a *3-hour* (pause for emphasis), *45-minute* (quick pause) proctored exam, covering a large range of information about stock and option markets (quick pause), fraud (q.p.), investment types (q.p.), suitability(q.p.), compliance and regulations(q.p.), and really pesky details like calculating tax equivalencies for various bonds. Not to mention all the other math! It's a big test, and as a coach, the data I could review was pages of numbers. Lots of numbers. The type of numbers where you lose your place before you have the answer you need. I wanted, and *needed*, a visual guide to quickly see how a learner was doing. With this spreadsheet, I could *easily* see where someone needed support and more training. If you also prefer visual cues over endless numbers, I recommend this tool.	Camera on self, engage with audience.
3 (0:02:00)	This is the spreadsheet, Tada!!! My example has one sheet in the workbook for each learner, with multiple test attempts listed on the top, broken down by each topic or subject on the side. I have 2 example learners, and their scores listed on the first 2 sheets. Looking at Learner 1, you can see that topic 2 and topic 8 were very low scoring on the first attempt. With the colors in the cells, it was easy for me to find those areas as places to study after that first test attempt. Then, once the learner completed the 2nd test, I can again visually call out where they need to study, and if there are multiple areas, I can prioritize study topics based on trends, overall score, and check with the learner to see how they felt on topics. Getting them to name where they wanted to study and feel more confident was always a winning strategy. From the scores on the 2nd test, Learner 1 still wants to spend time on topics 2 and 8, while I can just keep an eye on topics 6 & 7 to be sure the scores for those areas stay high. If we move to learner A, we can see this person was an overall high scorer, but still I'm able to see where to focus some study time, first looking at the score (lowest scoring topics should be studied), then	Camera to Screen – Spreadsheet zoom to 140% Point out relevant scores on learner 1 sheet. Point out the relevant scores on the Learner A sheet.

	the trend arrows (any reds arrows down indicate a dropped score, and opportunity for more study). Think about what metrics you would like to use on a score tracking spreadsheet. Are all of your learners going to be on one sheet? How many tests will they take? (pause 3 sec) Another area to consider is how those numbers relate to where the learners need to be – is an 80% passing? Or 100%? How will the scores show the effectiveness of training? On my spreadsheet, I used conditional formatting to break down the data. I'll review this with you, so that you can create your own spreadsheet that works for you.	
4 (0:00:30) (0:00:50) (0:00:20)	Let's begin! If you know what you want listed on the top and side of your spreadsheet, go ahead and fill that in. On this demonstration, I'll show you a version with the learners listed down the side, and multiple tests (that would cover the same material) on the top. I used the spreadsheet to show change in scores over time, so let's pretend my class has a pre-training test, a test half-way through training, a test at the end of training, and one final test 2 months later to find out what is sticking. Take a moment to fill out your spreadsheet or copy what I have here so that you get some experience using the conditional formatting rules. (Pause 10 seconds) While you're filling out your version, I've added averages scores as a final on both my rows (learners) and columns (tests). This allows me to see someone's overall score, as well as if the various tests are testing to the same difficulty. Remember that relying on averages can distract from other factors in someone's skill, so this is just informational for me, and to get a big picture view of the testing process (or the learner) overall. To get the formatting rules to work as we create the worksheet, go ahead and type in some numbers so the program knows you'll be formatting text. Be sure to include scores that are in all your ranges so you can make the formatting rules work!	Move to sheet 4 in the spreadsheet to begin the demonstration First row – 65, 65, 80, 85 Second row – 80, 83, 85, 92
(0:00:20)	Ok, now that we have our people and tests set up, it's time for the formatting rules! I'm going to show you how to set this up with a 3-color range, but you can certainly adjust this to using 2 colors (pass/fail) or more, whatever is best for you.	
(00:00:30)	Let's select the cells that will have the score data. Once the cells are highlighted, from your home menu on the ribbon, about in the middle there is a "Conditional Formatting" button. Select this, and a drop-down menu will show with lots of options.	Demonstrate the actions on the demonstration tab of the spreadsheet as the script goes through. Read the

(0:02:00)	Do know that in Excel, there are many ways to get tasks done. I'll show you one here, but as versions update, or from your own knowledge, there are other ways to set this up just as well. One Excel trick is how it is figuring out the rules for formatting. For my learners, we had an 81% passing score, anything between 65% and 80% was a place to study more, and if the score was below 64%, that was a critical focus. This is shown on sheets 1&2 of the example template on the site. The complicated part is that the formatting rules used 80-100 as passing/Green, but a score of 80 is 'Study/yellow.' Same on the lower range, the rule is set that 0 – 65 is 'Critical/red,' but 65 itself is yellow and 64 is red. This is because the rules works as if the score 80 is not above 80 – whereas 80.1 is above 80. On the bottom, the rule is looking for the score below 65, which starts at 64.9. So, as you figure out your score ranges, remember that Excel says between, but is calculating the figures as "greater than" and "less than." For this example, I'd like to use another option. Here, we'll label 91-100 our passing scores, 76-90 our concern areas, and 75 and below our critical focus.	dialogue, then, moving the cursor slowly, complete the step.
5 (0:01:40)	One point is to be mindful of accessibility. If this is going to be used for anyone besides yourself, be sure that you're checking for color-blindness, low vision, and other needs. As of the Microsoft 365 version, Office products also have an accessibility checker on the Review Tab of the ribbon. If you're interested in building your own color palette, I recommend Bruce Gabrielle's book, Speaking PowerPoint, as a great way to learn about colors and many other considerations for presentations and documents. I'm not going to cover his teaching here, but he does have a great website, https://speakingppt.com/ which has many of his tips and pointers for using color theory and visual presentation for effective communication. The book and his online videos cover this information in full. I recommend both tools. If you're not up to creating your own color palette, you can always use one of the preset choices Microsoft has. In Excel, you can go to "Page Layout" on the ribbon and select the "Colors" button. For me this is on the very far left. Once the drop down opens, you can see all the color themes that Office has. Since I'm looking to use Green, Yellow and Red, I can see that the themes Median and Marquee offer some colors in these hues. Let's try out Median and see if that fits.	Screen grab of https://speakingppt.com/ (Use edge browser to minimize bookmark and tab distractions)
6 (0:02:00)	Alright – we're ready to set up our first rule! Highlight all the cells in your spreadsheet that will have score data, and then, from the Home tab in the ribbon, select "Conditional Formatting." This will give you a drop down menu, and I'm going to select "New Rule." This brings up the "new formatting rule" dialog box. On the top, where it says, "Select a Rule Type," we're going to choose "Format only cells that contain. Then we can select "Cell Value" as the first	Back to the demonstration spreadsheet and slowly walk learners through the steps. Read the dialogue first, then

	drop down in the bottom, “Between” as the 2nd, in the 3rd box type in 91, and that last box will be 100. Now we have the values, but we need to tell Excel how to display the information in the cell – here's that visual part! There is an area showing **Preview**, and next to that a button with “Format…” Selecting “Format” will open another dialog box where you can change your font, font color, and background, or fill, color. Since we have our passing scores as the cell values, we want to use passing green, or whatever color you choose. I prefer to make the font bold and a darker green, and the background the same green hue but a much lighter shade to not be overwhelming with colors all over the place. Once you have your ideal font and background, selecting “Ok” will return you to the formatting rule box, and select ok again here. Now we’ll repeat this step with the 2 remaining score ranges and color schemes.	slowly move the cursor and complete the step.
(0:01:10)	With your data cells still highlighted, select the “Conditional Formatting” button from the home tab on the ribbon and select “New Rule.” In the dialog box, choose the option “Format only cells that contain” in the top section, and in the bottom section, we’ll update our “Cell Value” | “Between” | 76 | 90. Since this is our middle range, I’m going to use a yellowish color on the formatting options. Again, I’m updating my font to bold, the font color to a darker version of the color, and the background or fill to a very light version. I select “OK” and I’m choosing “OK” again and closing out the dialog. Still with me? Awesome. We’re on the last rule, for our ‘Red’ scores.	
(0:001:00)	Make sure your data cells are highlighted, select “Conditional Formatting,” then “New Rule.” Once our dialog box comes up, choose “Format only cells that contain” in the top section, and on the bottom, we’ll enter “Cell Value” | “Between” | 0 | 75. And onto the formatting options! These are the lowest scores, so I want to select a reddish orange color for the font and make it bold. Let’s do that Background/fill color in a lighter version. Almost done! Take a look at your cells – are the scores and colors matching up? Do you like how it looks together? Does the accessibility tracker show “Good to go?”	
(0:01:40)	If, like me, you didn’t fill out all of the cells with scores, you have a lot of cells that are red and don’t have data. Again, visually, that much red is distracting to me and makes me feel worse because red = bad! Let’s get rid of it, shall we? One more time – let’s highlight our cells with data, go up to Conditional Formatting, New rule. We’ll still select “Format only cells that contain,” but now we’re going to change it up just a bit. On the bottom half, we’re going to move the first drop down to read	

	"Blanks." Since we want the cells to still be normal, or unformatted, you can simply select "OK" here and close out the box. But Daisy, "It didn't work!" Yep, you're right. Easy update on this. Still have the data cells highlighted, and back to our conditional formatting. However, we need to "Manage Rules." On this box, you'll see the 4 rules we created, and they are listed in the reverse order of how we entered them. All we need to update here is that first rule listed, the last one we created with "Blanks." To the far right of the rule is a box that you can check, reading "Stop if true." This is going to tell Excel that if the cell is blank, we don't want the rest of the rules applied. Select OK, and your cells blank cells should be white!	
(0:02:10)	Most importantly, take a moment to test out your formulas. Do the colors change at the right numbers? We've set ours up so that 75 is red, 76 is yellow, 90 is yellow, and 91 is green. You can also add your averages formulas. Select the top cell for your average that you need to use the formula. Type **"Equals Average Open Parentheses**" then highlight the cells in the row that you want to include in the calculation. Close the parenthesis. Press ENTER. Once the formula is on the top cell, you can select the cell to highlight it and then position your cursor in the bottom right corner of the cell (on the box) and click and drag down to the rest of the cells you want the formula to apply to. This will ensure the formula applies to each row or column, using the numbers only from each row or column. If you have your averages on the row under your data, enter the formula on your left-most cell and type **"Equals Average Open Parentheses,"** highlight the cells in the column that you want to include in the calculation, "**close parenthesis"**, and press enter. Once the formula is set in that first row, you can highlight the cell, position your cursor in the bottom right corner of the cell (on the box of the outline), and click and drag to the rest of the cells that you need the averages on.	Model entering numbers throughout. Demonstrate average formula on the learner's scores first, then the test averages.
7 (0:02:10)	Congratulations! You've built a spreadsheet to help you review numbers visually, keeping you from ending up in a numbers pit with seemingly no way out! Now you should be able to create a score tracking spreadsheet with multiple variations available to allow you to use what will best meet your needs. This is a perfect place to stop if what we've completed here will work for you. That said, I do have another piece we can add to demonstrate – visually – how the learners' scores are changing with repeated testing. As a Series 7 coach, I wanted to use the data to see if someone was testing better on all topics as they got closer to test day, or if a bad score was just a one off for that day, or if they were increasing or decreasing their scores in topics. For that, I choose to add Icon Sets to the data to show these trends. First, a little background. The trick we used with the averages formula? Dragging the highlighted cell to following cells and it works with the information in just that row or column without adjusting the formula? That's a super helpful feature in Excel where it uses a	Camera on self

	"relative reference" so that you can have the same formula apply to different sets of data. With Relative Reference, moving a formula to a new cell allows Excel to understand that you want the formula to apply to the data entered in row 4, not the data in row 3 where the formula was entered. When it comes to the conditional formatting rules, though, Excel is only set up to use "Absolute reference," meaning we have to enter the formula for each cell so that it's based on a specific cell. There's no way (currently) to get Excel to use the relative reference and apply the formula correctly. I will say that this step can be, well, boring and repetitive. So, if you're ok without the trends arrows, this can be a good place to stop. That said, let's go ahead and get back into Excel and add some arrows!	
8 (0:04:10) (0:02:00)	Ok! Here we are back in Excel. One point I want to show you is that for my data, I only wanted to see an arrow up or down if there was a change in the score over 1 percentage point. Depending on your data, you may want to see smaller changes, which I will review quickly. Keep in mind that the formula I used is only going to adjust to up or down arrows if the change is more than 1 percent. There are 2 ways to add the icon sets – you can apply them to all of your cells with data, then edit each cell with your formulas. For me, I added the icon sets and edited the rules for each cell. This just helped me to keep my place and know what cell I was working on and thereby know which cell to reference in my formulas. I'll demonstrate the latter option. Starting on my 2nd cell on the top with data, cell C2. I do not want the icon set on the first column of data, since I'm using it to show the change from one test to the next. Once I have that cell highlighted, I'm going back to the "Conditional Formatting" button, and from the drop-down menu, there's an option for "Icon Sets." A new drop-down appears on the side, with all the sets you can use. The directional arrows showing Green (Up), Yellow (straight) and Red (Down) are the ones I use. Selecting that choice adds the icon set to the cell, however, the type of arrow that is listed is based only on the number in the cell, not how one cell's value relates to another cell's value. Let's fix that! Go back to "Conditional Formatting," and this time we're going to "Manage Rules." We've seen this dialog box before, when we added the option to 'stop if true' for our blank cells. You should have your new Icon Set rule on the top of the list of rules, and you want to select "Edit Rule" to change the formatting rule. The bottom half of this dialog box is where we want to make our changes. The rules start with our Green Up arrow, then a drop down box to change your relation (Greater than, Greater than and equal to), and if you want to see changes that are smaller than one percentage point, select "Greater Than" for your green up arrow.	Back to screen recording of Excel – demonstration sheet.

	We're going to skip the Value box, because we need to change the type of rule we're using first, and that will clear the value box on its own. For the last 2 boxes, change "Percent" to "Formula. Now, in the Value box, type "**Equals"** and select your cell with the first score. For the yellow straight arrow, you'll leave the relation box (Greater than and equals to) as is and type "**Equals,"** then select the cell with your first score again. The Value for both arrows will show "=B2," where B2 is the reference cell. This will only show a yellow straight error if the scores are the same in both cells.	
(0:02:15)	For my goal of reviewing score changes that are over one percentage point, I'm going to model that example now. On the relation box, you want to leave it as Greater than and equal to. We're going to skip the Value box, because we need to change the type of rule we're using first, and that will clear the value box. So, on the last 2 boxes, change "Percent" to "Formula." This will clear the "Value" box so that we can use our formulas. In the "Value" box for the Green Up arrow, you can type "**Equals Sum Open Parenthesis One point one plus"**. Now you want to select cell B2 on the spreadsheet for Excel to add the cell reference to the formula. Finish by typing **"Close Parenthesis"** and move to the next box down, the Value for the Yellow straight arrow. For changes greater than one percent, on our "Value" box for the yellow straight arrow, type "**Equals Sum Open Parenthesis negative one plus**." Then select on the cell with the value from the earlier test and type your **"Close Parenthesis."** Select OK. One more OK on the "Conditional Rules Formatting Manager" dialog box, and you can see your arrow change to be a correct comparison to the change from the score on the previous cell. If I update cel B@ to a score of 66, the yellow straight arrow stays. Updating the score in B2 to 67, however, should change that to a red down arrow to indicate a score drop of more than 1 percentage point. Let's walk through this a couple more times together so you have a chance to practice entering the information.	
(0:03:30)	Highlight your next cell, select "Conditional Formatting> Icon Sets> Directional arrows." Now that you have that arrow in the cell, let's edit the rule. Back up to Conditional Formatting> Manage Rules. Make sure the Icon set rule is highlighted and select "Edit Rule." On the bottom section of the dialog box, change the two "Type" drop-downs to read "Formula." In the top Value box for the Green up arrow, type in "**Equals Sum Open Parenthesis one point one plus**" and use your cursor to highlight the cell to the left of the one with the new arrow. Then back to the dialog box to type "**Close Parenthesis"** and move down to the "Value" box for the yellow straight arrow. Here, let's type in "**Equals Sum Open Parenthesis negative one plus** [highlight the same cell to the left that we just used] **Close Parenthesis**." Select OK, ok again back in the	

(0:02:00)	Conditional Formatting Rules Manager box, and you're done with this cell! I imagine you can see how this becomes boring. I support breaks before errors – If you haven't heard of the Pomodoro technique, check it out! Timed periods of work followed by short breaks can help keep you focused and on track more than just sticking with this until it's done, and you risk making mistakes. Last one together. Highlight your next cell, select "Conditional Formatting> Icon Sets> Directional Arrows." That added our arrow, now let's fix the rule. Back up to Conditional Formatting> Manage Rules. Make sure the Icon set rule is highlighted and select "Edit Rule." On the bottom section of the dialog box, change the two "Type" drop-downs to read "Formula." In the top Value box for the Green up arrow, type in "**Equals Sum Open Parenthesis one point one plus**" and use your cursor to highlight the cell to the left of the one with the new arrow. Then back to the dialog box to type **Close Parenthesis"** and move down to the "Value" box for the yellow straight arrow. Here, let's type in "**Equals Sum Open Parenthesis negative one plus** [highlight the same cell to the left that we just used] **Close Parenthesis**." Select OK, ok again back in the Conditional Formatting Rules Manager box. And now, feel free to pause this video if you want to keep going with the icon sets, but I'm going to finish this off camera for you.	
9 (0:01:30)	Hey! You just learned a new skill in Excel! Congratulations, I'm so happy that you took this time to build up your abilities! Celebrate yourself!!! Let's take a quick run through the demonstration spreadsheet, and make sure it's working how we want it to. Please refer to the posted Job Aid for a future reference when you want to remember a part of this training. I've included screen shots to be sure the job aid is helpful, just know that Microsoft loves to update their systems, and the screenshots may not be the same as the version of Excel that you are using. I want to change the scores around so that I can see the formatting changes, and make sure I have my number thresholds set up correctly. Since I set this up to change the background/fill color at changes from 75 to 76, and also 90-91, I want to see that work, as well as the arrows updating to Up (green) and Down (Red) only when the percentage change is over one%.	Adjust the numbers in the spreadsheet to confirm working as expected.
10 (0:01:00)	This is working exactly right! My one final piece of advice is to save this spreadsheet you've made and use it as a template for the actual spreadsheets you'll use in training. Be sure when using copy/paste to choose "Paste Special> Values and Source Formatting" This is under Paste Values and will let the formatting rules and your text stay. You may need to re-enter your formulas for the averages. But since you are such an excel expert, I am sure you	Camera on self

	will be on top of it! Thank you so much for joining my training, and I hope you have the very best day.	