

INTRODUCTION TO EXCEL COPILOT

IN THIS LESSON, YOU WILL LEARN:

- ✓ What Excel Copilot is
- ✓ How Excel Copilot works
- ✓ Where to find Copilot in Excel
- ✓ How to interact with Copilot
- ✓ How to write effective prompts
- ✓ Best practices for using Copilot

WHAT IS EXCEL COPILOT?

Excel Copilot is an AI-powered assistant for Microsoft Excel.

COPILOT CAN HELP YOU:

- Analyze data
 - Create formulas
 - Identify trends
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- Summarize information
 - Organize and transform data
 - Create visualizations
 - Speed up repetitive tasks

TRADITIONAL EXCEL VS. COPILOT

TRADITIONAL APPROACH

Know the formula → Write the formula → Check the result

COPILOT APPROACH

Describe what you need → Ask Copilot → Review the result

EXAMPLE

Instead of asking “Which formula should I use?”, ask “Calculate total sales for each category.”

SAMPLE SALES DATASET

Product	Category	Sales	Quantity
Laptop	Electronics	1200	3
Headphones	Electronics	300	5
T-Shirt	Clothing	20	10
Jacket	Clothing	80	4
Monitor	Electronics	250	2

DATASET STRUCTURE

- Product → Item name
- Category → Product category
- Sales → Revenue amount
- Quantity → Units sold

OPEN EXCEL COPILOT

STEP 1

Open your Excel workbook.

STEP 2

Make sure your data is structured clearly.

STEP 3

Select your dataset or Excel Table.

STEP 4

Open Copilot from the Excel interface.

STEP 5

Enter your request in the Copilot prompt area.

YOUR FIRST COPILOT PROMPT

ENTER:

Summarize this sales dataset and highlight the most important insights.

COPILOT MAY IDENTIFY:

- Total sales
- Best-performing product
- Best-performing category
- Sales distribution
- Interesting patterns or trends

UNDERSTANDING COPILOT'S RESPONSE

FROM NUMBERS TO INSIGHTS

EXAMPLE INSIGHTS

TOP PRODUCT

Laptop

TOP CATEGORY

Electronics

TOTAL SALES

\$1,850

KEY INSIGHT

Electronics generates the majority of total sales.

REMEMBER

Excel calculates.

Copilot helps you understand.

ASK FOLLOW-UP QUESTIONS

EXAMPLE 1

Which product has the highest sales?

EXAMPLE 2

Which category generates the most revenue?

EXAMPLE 3

What percentage of total sales comes from Electronics?

EXAMPLE 4

What trends do you see in this dataset?

KEY IDEA

Analyze → Ask → Refine → Explore

WRITE BETTER PROMPTS

VAGUE PROMPT

Analyze this.

BETTER PROMPT

Analyze sales by category.

STRONG PROMPT

Analyze sales by category, identify the highest-performing category, and explain the main insight from the data.

PROMPT FORMULA

Action + Data + Criteria + Desired Result

WHAT CAN EXCEL COPILOT DO?

ANALYZE DATA

Find trends, patterns, and insights.

CREATE FORMULAS

Generate formulas based on your requirements.

CREATE VISUALIZATIONS

Help turn data into charts and visual summaries.

WORK WITH DATA

Identify patterns, organize information, and assist with data preparation.

SUMMARIZE INFORMATION

Turn large datasets into understandable summaries.

GENERATE INSIGHTS

Help identify important findings from your data.

PREPARE YOUR DATA

GOOD DATA STRUCTURE

- ✓ Clear column headers
- ✓ Consistent formatting
- ✓ No unnecessary blank rows
- ✓ Consistent data types
- ✓ Organized tables

EXAMPLE

Product	Category	Sales	Quantity
Laptop	Electronics	1200	3
Headphones	Electronics	300	5

Clean data → Better analysis

ALWAYS VERIFY THE RESULTS

AI can assist you.

You make the final decision.

CHECK:

- Formulas
- Calculations
- Data interpretation
- Assumptions
- Recommendations

BEST PRACTICE

Generate → Review → Verify → Use

LESSON 1 — KEY TAKEAWAYS

ON-SCREEN TRAINING

YOU LEARNED:

- ✓ What Excel Copilot is
- ✓ How Copilot works with Excel data
- ✓ How to open Copilot
- ✓ How to write your first prompt
- ✓ How to ask follow-up questions
- ✓ How to write better prompts
- ✓ Why structured data matters
- ✓ Why AI-generated results should be verified

COMING NEXT

LESSON 2 — CLEANING DATA WITH EXCEL COPILOT

IN THE NEXT LESSON:

- Identify messy data
- Find inconsistencies
- Clean text data
- Identify duplicates
- Standardize information
- Use Copilot to assist with data preparation

CHAPTER 17 — EXCEL COPILOT LESSONS

Learn Excel. Work Smarter. Use AI.