

AI-Powered Excel: Data, Dashboards & Decisions



Days: 1

Prerequisites: Participants should have advanced Excel skills equivalent to Excel Level 3. Completion of Excel Level 3 is recommended; however, participants who have completed Excel Dashboards, Power BI, Excel Advanced Data Analysis with Pivot Tables and PowerPivot, or who possess equivalent advanced Excel experience are also appropriate candidates for this course. No prior AI experience is required.

Audience: Business professionals, analysts, coordinators, operations staff, managers, and supervisors who use Excel to prepare, analyze, or report data and want to work more efficiently with Microsoft Copilot.

Description: AI-Powered Excel: Data, Dashboards & Decisions is a hands-on, instructor-led course that teaches participants how to direct Copilot through spreadsheet preparation, calculations, analysis, dashboards, and reporting while maintaining human judgment and verifying results.

Through a realistic business scenario, participants move from messy source data to a management-ready recommendation. Guided demonstrations, individual and partner exercises, and a final capstone develop practical skills in reviewing Copilot plans, tracing findings to source data, and auditing workbooks for errors that may otherwise go unnoticed.

Participants create a cleaned dataset, a formula-assisted workbook, analyst and management dashboards, a traced business finding, a workbook audit, and an executive summary with a recommendation.

Course Objectives: By the end of this course, participants will learn to:

- Distinguish between Copilot modes and choose whether to request an answer or a workbook change
- Evaluate a multi-step Copilot plan before it changes a workbook
- Prepare and structure data for reliable analysis
- Generate, explain, and troubleshoot formulas using business language
- Investigate spreadsheet data and trace findings back to source rows
- Build analyst and management dashboards with slicers and timelines
- Audit Copilot-generated work and hand-check critical results
- Create an executive summary explaining findings, assumptions, and recommended next steps

OUTLINE:

COURSE OVERVIEW AND INTRODUCTIONS

- Participants will review workshop activities, access class files, and discuss how they currently use Excel in their work.

MODULE 1: THE NEW EXCEL WORKFLOW

- How Copilot acts on a workbook
- Answer-only and editing modes
- Reviewing proposed plans before approval

MODULE 2: PREPARING DATA FOR SUCCESS

- Diagnosing messy spreadsheet structures
- Preserving evidence of missing data
- Cleaning source information
- Creating reliable Excel tables

MODULE 3: EVERYDAY PRODUCTIVITY WITH COPILOT

- Creating calculated columns

- Explaining inherited formulas
- Producing summaries
- Completing common spreadsheet tasks

MODULE 4: FROM ANALYST VIEW TO MANAGEMENT DASHBOARD

- Building an exploratory analyst dashboard
- Designing a dashboard for managers
- Adding slicers and a timeline
- Connecting reports for independent use

MODULE 5: FINDING THE BUSINESS INSIGHT

- Turning business concerns into answerable questions
- Investigating spreadsheet data
- Tracing findings to supporting source rows

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MODULE 6: COPILOT GETS IT WRONG

- Auditing inherited workbooks
- Identifying structural and formula errors
- Recognizing reasonable-looking but incorrect results
- Checking business risks and critical calculations

MODULE 7: GUIDED EXECUTIVE CAPSTONE

- Resolving conflicting departmental data
- Defining the appropriate business measure
- Building and verifying the analysis
- Presenting an executive summary and recommendation

MODULE 8: YOUR FIRST WEEK BACK

- Identifying a practical Copilot task
- Establishing a workbook audit habit
- Developing a plan for applying course skills

WORKSHOP WRAPUP

- Participants will have an opportunity to ask final questions and complete a training satisfaction survey.