



LIVE SEMINAR

# Using Microsoft® Copilot in Excel®

How to work smarter with AI while staying in control



## THIS SEMINAR AT A GLANCE:

Copilot does not replace Excel expertise—it amplifies it.

By the end of this course, participants will know how to:

- Use Copilot in Excel productively without over-relying on AI
- Ask clearer, more effective questions that generate better results
- Evaluate Copilot output and identify errors or misleading responses
- Protect sensitive data, follow policy and avoid costly mistakes
- Integrate AI into everyday Excel work with confidence

Participants leave with practical skills they can apply immediately at work.

# Using Microsoft Copilot in Excel

S E M I N A R S U M M A R Y



Microsoft Copilot is transforming how professionals analyze data, build insights and work in Excel. This seminar is designed for Excel users who want to use Microsoft Copilot confidently, productively and responsibly without treating AI as a black box.

Rather than promising shortcuts or magic answers, this course shows you how Copilot really works inside Excel. Participants learn where Copilot excels, where it has limitations and how to combine AI assistance with strong Excel skills for better outcomes.

This seminar emphasizes practical application as well as critical thinking and professional judgment. Participants learn how to think with AI, not simply click buttons, so they can use Copilot as a powerful support tool while staying in control of their data and results.

## How You'll Learn:

- Live demonstrations using real Excel data
- Guided examples that walk through common scenarios
- Discussion-based learning and scenario analysis
- Practical examples you can apply immediately at work

This course emphasizes thinking with AI, not just clicking buttons.

## Who Should Attend?

- Excel users who want to use Copilot effectively and safely
- Analysts, operations staff and business professionals
- Trainers, educators and support teams
- Anyone responsible for data-driven decisions using Excel

## WHAT YOU'LL LEARN:

### Foundations: AI, Copilot and Expectations

- What generative AI is and what it is not
- How Microsoft Copilot differs from public AI tools
- Understanding Chat Mode vs. Agent Mode in Excel
- Building realistic expectations for AI-assisted work

### The Art of the Prompt

- How to write prompts that produce useful results
- Structuring requests for clarity, accuracy and control
- Iterating and refining prompts for better outcomes
- Knowing when to continue a conversation or start a new one

### Preparing Your Data for Copilot

- Formatting data to improve Copilot analysis
- Cleaning and standardizing datasets
- Splitting, combining, sorting and filtering columns effectively
- Avoiding common data issues that confuse AI tools

### Applying Calculations with Confidence

- Using Copilot to generate formulas and explanations
- Date calculations, text processing and lookup scenarios
- Knowing when native Excel tools are the better choice
- Verifying and testing AI-generated formulas

### Analyzing Data

- Discovering trends and insights with Copilot
- Refining AI-generated analysis for business relevance
- Forecasting and prediction scenarios
- Understanding limitations of AI-driven insights

### Visualizing Data

- Creating PivotTables and summaries
- Generating charts and visualizations
- Applying conditional formatting for clarity
- Communicating insights more effectively with visuals

### The AI Mindset: How to Be Diligent

- Recognizing hallucinations and misleading outputs
- Understanding data bias and GIGO (Garbage In, Garbage Out)
- Spotting red flags before decisions are made
- Applying best practices for reviewing and validating results

### Security, Privacy and Policy

- Differences between enterprise and public Copilot environments
- What data is safe—and unsafe—to share with AI
- Copyright considerations for AI-generated content
- Understanding and navigating company AI policies



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