

Next-Generation Excel – Advanced Copilot AI for Real-World Applications

The “Next-Generation Excel – Advanced Copilot AI for Real-World Applications” training course demonstrates how to effectively use artificial intelligence for advanced data analysis, workflow automation, and the creation of professional reports and dashboards in Excel. The program focuses on practical business scenarios and maximizing the capabilities of Microsoft Copilot in day-to-day analytical and reporting tasks.

During the workshop, participants will learn how to create advanced analyses, generate complex formulas, use AI to interpret data, and automate time-consuming processes. The training also covers advanced prompt engineering techniques, optimizing work with large datasets, and using Copilot to support business decision-making processes.

Through hands-on exercises and real-world examples, participants will gain practical skills that enable them to work more efficiently, uncover valuable insights from data, and take full advantage of AI-powered features within Microsoft Excel and Microsoft 365.



Training recipients

Individuals who regularly work with Microsoft Excel, including analysts, finance professionals, controllers, HR specialists, sales professionals, managers, and other users who rely on data in their day-to-day work.



Benefits

After completing the training, participants will be able to:

1. Accelerate advanced data analysis and reporting processes.
2. Automate complex workflows and tasks in Excel.
3. Work with more confidence on advanced formulas and functions.
4. Use AI to interpret data and generate business recommendations.
5. Create professional dashboards and management reports.
6. Use AI solutions within their organization in an informed, responsible, and effective manner.



Training program

Advanced Microsoft Copilot Capabilities in Excel

- Copilot capabilities in Excel
- Integration of Copilot with Microsoft 365
- Advanced AI use cases and scenarios
- Working with large datasets
- Limitations and best practices

Hands-on exercises:

- Analyzing complex business scenarios
- Optimizing workflows with Copilot

Advanced Formulas and Business Logic

- Generating complex formulas with Copilot
- Advanced functions, including:
 - XLOOKUP
 - FILTER
 - UNIQUE
 - SORT
 - LET
 - Conditional logic and formulas

- Building business logic in Excel
- Analyzing and optimizing existing formulas
- Debugging formula errors with AI assistance

Hands-on exercises:

- Creating advanced calculations
- Optimizing worksheets using Copilot

Advanced Data Analysis with AI

- Trend and anomaly analysis
- Identifying relationships and patterns in data
- Generating business insights

- Comparative and predictive analysis
- Automatically creating management commentary and executive summaries
- Working with complex datasets

Hands-on exercises:

- Analyzing sales and financial data
- Developing business recommendations
- Interpreting results with AI support

Reporting and Management Dashboards

- Automated report creation
- Advanced charts and data visualizations
- Building KPI dashboards
- Copilot-assisted PivotTables
- AI-powered data storytelling

Hands-on exercises:

- Building a management dashboard
- Summaries and report narratives

Process Automation and Productivity

- Automating data-related workflows
- Data preparation and transformation
- Generating instructions and procedures
- Using Copilot within business processes

Hands-on exercises:

- Automating report preparation
- Standardizing data with AI assistance

Prompt Engineering and AI Security

- Advanced prompt engineering techniques
- How to obtain precise and reliable AI responses
- Limitations of AI models
- Validating outputs and analysis quality
- Data security and governance considerations

Hands-on exercises:

- Creating advanced prompts
- Evaluating the quality and accuracy of Copilot responses



Expected preparation of the participant

basic knowledge of MS Excel or EX02 training



Duration

1 days / 7 hours

Language

English