

# ExcelAI: Using AI and Chatbots for Efficient Work in Excel

This training provides a practical introduction to using artificial intelligence in everyday work with Excel. Participants will learn how to leverage AI tools to automate tasks, generate formulas, clean and transform data, and support decision-making processes. The program combines modern AI capabilities with traditional Excel automation techniques, including VBA, to create efficient, scalable, and business-oriented solutions. The training is highly hands-on and focused on real-world use cases.



## Training recipients

- Excel users who want to increase their efficiency using AI
- Data analysts and reporting specialists
- Business professionals working with data on a daily basis
- Office workers looking to automate repetitive tasks
- Individuals interested in combining Excel, AI, and automation
- Beginners to intermediate users of Excel (basic knowledge required)



## Benefits

- Significant reduction of manual work in Excel
- Faster data analysis and report generation
- Improved accuracy and reduced risk of errors
- Ability to solve complex problems more efficiently
- Increased productivity in daily tasks
- Practical skills immediately applicable at work

- Better understanding of modern AI tools in business environments



## Training program

### Module 1

1. Introduction to artificial intelligence and its role in Excel
2. Best practices for using AI and security considerations
3. Setting up your own chatbot to support Excel users
4. Adapting the chatbot to worksheet structure and business context
5. AI tools used in Excel workflows
6. Automating tasks in Excel using AI
7. Generating and optimizing formulas with AI
8. Automated data cleaning and transformation with AI support

### Module 2

1. Introduction to macros and the concept of workflow automation
2. Recording first macros and basic code editing
3. Overview of the VBA editor and structure of simple procedures
4. Creating macros to automate repetitive tasks
5. Supporting VBA work with AI — code generation, analysis, and improvement
6. Hands-on workshops and building custom solutions combining formulas, macros, and AI
7. Advanced use of AI for formulas, data processing, and automation in Excel
8. Practical scenarios combining AI, formulas, and VBA in a single workflow
9. Analyzing and interpreting AI-generated results in a business context



## Expected preparation of the participant

- Understanding how AI can support Excel-based workflows
- Ability to use AI tools to generate and optimize formulas
- Skills in automating repetitive tasks using AI and macros
- Knowledge of how to clean and transform data with AI support
- Ability to design and use a chatbot in the context of Excel
- Understanding of VBA basics and AI-assisted coding
- Capability to combine AI, formulas, and VBA into one workflow



## Czas trwania

2 dni / 14 godzin

## Language

English