Microsoft 365 Copilot and Excel Data Analysis Training

Duration: **3 Day**

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Overview

This interactive {*training} explores how Microsoft 365 Copilot can be applied within Excel for**efficient and intelligent data analysis**. Learners will use **plain English prompts** to:

- Generate formulas
- Clean datasets
- Analyse trends
- Create visual summaries

Delivered in a licensed, live environment, this hands-on course equips learners to**automate reporting, build dashboards, and transform raw data into actionable insights**.

Prerequisites

- Basic working knowledge of Excel
- Ideally, completion of **Empower Your Workflow: Fundamentals of Microsoft 365 Copilot**

Who Should Attend

- Professionals managing and analysing data in Excel
- Individuals aiming to improve productivity with AI in Microsoft 365
- Beginners & intermediates enhancing data storytelling and reporting with Copilot

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What You Will Learn

By the end of this {*training}, you will have gained knowledge and skills in the following areas:

- Understand Copilot's role in enhancing Excel workflows
- Use natural language prompts for common data tasks
- Analyse datasets with AI insights and summaries
- Identify duplicates, inconsistencies, and clean messy data
- Create charts and dashboards with Copilot prompts
- Develop automated reports and narrative summaries
- Troubleshoot common Copilot issues in Excel

Outline

1. Prompting Basics: Asking the Right Questions

- Introduction to prompting in Copilot
- Examples of effective vs ineffective prompts

2. Data Cleansing

- Removing duplicates and empty fields
- Standardising formats and detecting inconsistencies

3. Fundamental Data Analysis

- Generating key statistics
- Exploring trends over time, categories, and metrics
- Identifying anomalies and outliers

4. Visualisations

- Creating bar, line, and pie charts
- Customising visuals and layouts
- Automating dashboards with Copilot

5. Smarter Reports & Narratives

- Converting visuals into narrative summaries

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- Creating dynamic storytelling for reports
- Improving clarity and insight in data presentation

Exams & Assessments

- No formal exams included
- Learners assessed via real-time tasks and guided demonstrations

Hands-On Learning

- Practical exercises in a licensed Microsoft 365 environment
- Real-world datasets for practice
- Guided prompts and collaborative problem-solving