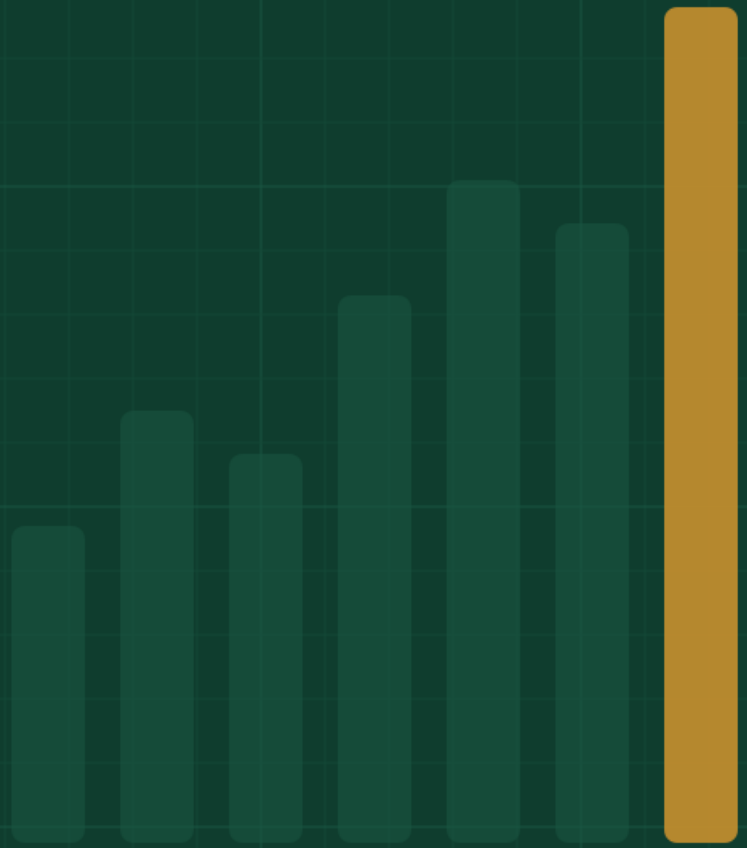
MICROSOFT 365 COPILOT

Turn Data into Insights with Excel Copilot

From raw spreadsheets to decisions, faster



Mohammed Arif,PhD
GenAI Solution Architect · Microsoft Certified Trainer

TODAY'S JOURNEY

Three steps, one dataset

01

Get started

Know the tools, modes and good habits

02

Find insights

Data to information to insight

03

Generate reports

Dashboard and management summary

PART 1

Get started

Copilot in Excel: what it is and how to drive it

COPILOT IN EXCEL FEATURES

Four things to know before you prompt

Three modes

Pick how much Copilot may do

Allow editing
Copilot edits the sheet

Plan
Shows steps first

Chat only
Answers, no changes

Skills

Ready-made experts. Call them with @

@clean-data fix this sheet

@clean-data
@chart-design
@theme-design
@skill-builder

Customize

Personal settings and workbook rules

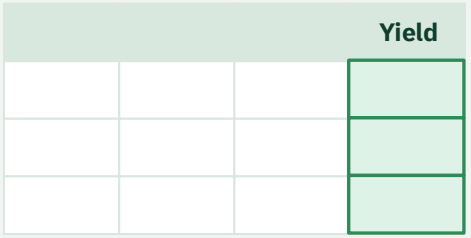
Settings › Personalization
Your style, every workbook

Read_Me | Data | **.Rules**

A visible .Rules sheet = rules for this workbook

See and undo

Every change is shown. You stay in control



Changed cells and sheet tabs light up

Ctrl + Z **Stop**

WHAT IT CAN DO

Ask in plain English. Copilot does the clicks.

Ask questions
Which estate grew the most?

Find trends
Month by month, peak and dip

Write formulas
Yield per hectare, % change

Build charts
The right chart for the message

PivotTables
Summaries by any field

Format data
Tables, colours, highlights

BEST PRACTICES

Good habits, better answers



Name columns clearly

FFB_Tonnes, not Col3



Keep data tidy

One header row, no merged cells, no blanks



One ask at a time

Small steps beat one giant prompt



Always check the numbers

Tie back to a known total



Protect your data

Follow company policy for AI tools

PART 2

Find insights

Think like an architect, not a typist

THE GOAL

Our goal: turn data into insight

An architect designs the path before building. Three steps:

01

Data

Raw rows. Messy, unchecked

02

Information

Clean, proven, summarised

03

Insight

What happened, why, what to do

STEP 1 · DATA TO INFORMATION

Copilot does the heavy lifting. You decide.

Copilot does

- Profiles the sheet in seconds
- Finds and fixes data issues
- Adds calculated columns
- Builds PivotTables and summaries

You decide

- What question to answer
- Which fixes to approve
- Whether the totals are right
- What the numbers mean

STEP 1 · DATA TO INFORMATION

Two moves: prepare, then scan

P.R.E.P

Prepare the data

Profile · Repair · Evaluate & Enrich · Prove

S.C.A.N

Scan for signals

Spikes · Comparison · Anomalies · No change

PREPARE

P.R.E.P: make the data trustworthy

P

Profile

What is in the sheet? What is wrong?

Chat only

R

Repair

Fix names, blanks, duplicates, text numbers

Plan

E

Evaluate & Enrich

Add the columns you need: yield, cost per tonne

Allow editing

P

Prove

Totals match the source. Then trust it

Chat only

TRY IT · P.R.E.P

P.R.E.P in four prompts

P **Profile** — Chat only

Profile the sheet Estate_Data. List the columns, row count, and every data quality issue. Do not change anything.

R **Repair** — Plan

Plan a clean-up: one row per estate per month, standard estate names, numbers as numbers, no blank or duplicate rows. Put it in a new table tbl_Estate on a sheet named Clean.

E **Enrich** — Allow editing

In tbl_Estate, add Yield_t_ha = FFB_Tonnes / Mature_Hectares and Cost_per_t = Harvest_Cost_RM / FFB_Tonnes.

P **Prove** — Chat only

Compare tbl_Estate with Control_Totals: rows, FFB_Tonnes and Harvest_Cost_RM. Show both and say Match or No match.

SCAN

S.C.A.N: look for the signals

S

Spikes & Drops

What moved the most?

C

Comparison

Versus last month, peers or target?

A

Anomalies

What looks odd or out of pattern?

N

No Change

What should have moved, but didn't?

Output: information you can trust, ready to become insight

TRY IT · S.C.A.N

Let Copilot scan, you judge

1 **Build the view**

Allow editing

From tbl_Estate, make a PivotTable on a new sheet named Scan: Estate in rows, Month (Apr to Sep) in columns, average Yield_t_ha in values.

2 **Scan it**

Chat only

Apply S.C.A.N to the Scan sheet: Spikes/Drops, Comparison, Anomalies, No Change. One line with numbers for each. Use only this data.

3 **Challenge it**

Chat only

Challenge the biggest finding. Could rainfall or a data error explain it? Check Rainfall_mm and Harvesters and tell me what the data says.

STEP 2

Information to insight

Numbers inform. Insights move people to act.

WHAT IS AN INSIGHT?

Insight = what + why + what to do

WHAT happened
with numbers

+

WHY it matters
to the business

+

WHAT to do
next step

NOT AN INSIGHT

Bukit Hijau yield was 1.24 t/ha in September.

INSIGHT

Bukit Hijau yield fell 29% from June to September while the other estates grew. Harvesters fell by 67 in the same months. We lost about 3,500 tonnes of fruit in peak season. Add harvesters before October.

PART 3

Visual reports

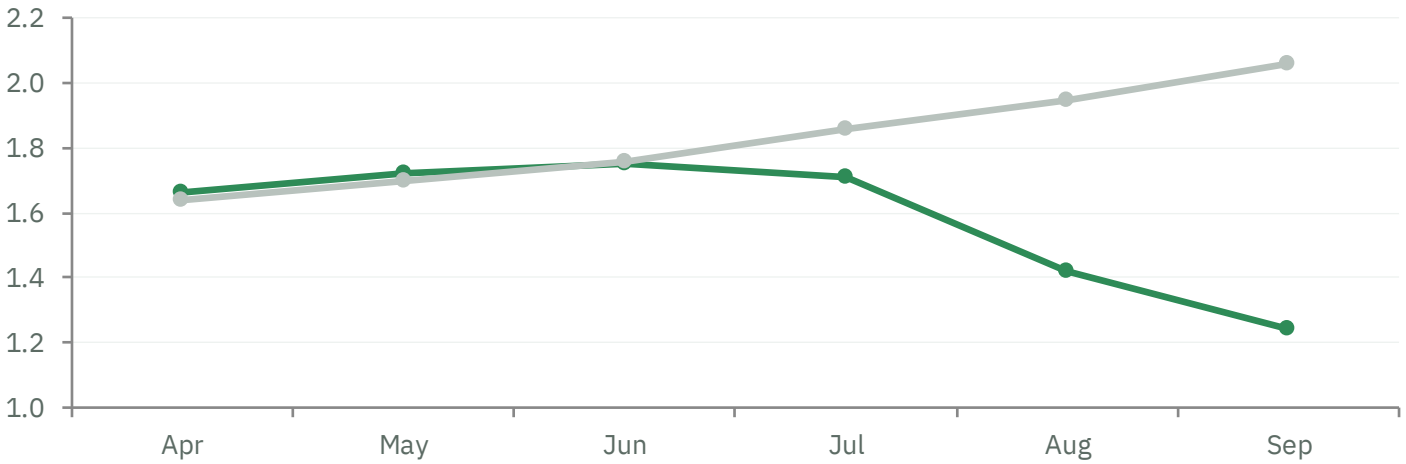
Show the insight so leaders can decide in one glance

DASHBOARD + MANAGEMENT SUMMARY

One page. One message. One ask.

Bukit Hijau yield fell 29% while 5 other estates grew

151,961 t	1.24 t/ha	-67
FFB, Apr to Sep	Bukit Hijau, Sep	Harvesters since Jun



1. **Title tells the story**
   Insight + colour as legend
2. **3 numbers that matter**
   KPI cards, not a data dump
3. **One clear chart**
   Grey for context, one colour for the point
4. **Summary + ask**
   Problem, impact, action, owner

TRY IT · REPORT

From information to a one-page report

1

Plan the dashboard

Plan

Plan a one-page dashboard on a new sheet named Dashboard: 3 KPI cards, a line chart of Yield_t_ha by month for Bukit Hijau vs the average of the other estates, and a title that states the insight.

2

Build it

Allow editing

Build it. Use @chart-design: Bukit Hijau in green, other estates in grey, no gridlines, no 3D.

3

Write the summary

Allow editing

Under the chart, add a management summary: Problem, Impact (with numbers), Action, Owner, Due date. Max 60 words.

REMEMBER

Do's and don'ts

Do

- Start in Chat only to explore
- Use Plan for big changes
- Keep data in clean tables
- Prove totals before you present
- Ask for one thing at a time

Don't

- Trust a number you have not checked
- Paste confidential data into unapproved tools
- Ask for everything in one prompt
- Skip reading the plan
- Present a chart without a message

Attendance

Scan to mark your attendance

Achievement code

Scan to claim your achievement

Feedback

Two minutes.

Thank you