

AI-Driven Data Analysis with Excel Online + ChatGPT

Learning Outcomes

- Organize and transform raw business and stock data into structured, analysis-ready formats using Excel Online.
- Create charts, identify trends, and simulate forecasts with Excel tools and AI-assisted reasoning.
- Use ChatGPT to interpret data, predict future outcomes, and generate concise reports and recommendations.
- Develop data-driven decision-making skills by combining spreadsheet analysis with natural language AI prompts.

Activity Summary

Warmup Activity

- Open Excel Online and paste this raw dataset into Column A:
- John Doe, Electronics, 500
- Sarah Lee, Furniture, 300
- Alex Smith, Clothing, 150
- Michael Brown, Electronics, 700
- Emily Davis, Clothing, 200
- Chris Johnson, Furniture, 400
- Select Column A, go to Data > Split Text to Columns.
- Choose Delimiter > Comma (,).
- Format the resulting table. Label columns as: Customer Name, Category, Total Sales.

Visualize Sales Potential with Interactive Sorting

- Click anywhere inside your formatted sales table.

- Go to Home > Sort & Filter > Sort by Total Sales (Descending).
- Highlight Category and Total Sales columns.
- Go to Insert > Recommended Charts and choose a Clustered Column or Pie Chart.
- Add Data Labels to the chart.

Summarize Sales Insights with ChatGPT

- Copy the full sales table.
- Paste it into ChatGPT.
- Prompt: "Analyze this dataset and summarize sales trends. Which category is underperforming and why?"

Ask GPT to Forecast Sales

- Copy the updated dataset (with Month column).
- Paste into ChatGPT.
- Prompt: "Predict sales for the next 3 months based on this data."

Business Strategy Suggestion

- Prompt ChatGPT: "What business actions should be taken to improve sales in underperforming categories?"

Import Stock Price Data

- In Google Sheets: `=GOOGLEFINANCE("AAPL", "close", DATE(2023,1,1), TODAY())`
- Copy Date and Close columns.
- Paste into Excel sheet AAPL_Data.

Visualize Stock Price Trend

- Highlight Date and Close Price columns.
- Insert Line Chart.
- Add a Trendline (Right-click > Add Trendline).

ChatGPT Stock Summary

- Copy the stock table.

- Prompt: "Summarize this stock's performance and direction over 6 months."

Generate Investor Report

- Prompt: "Write a 5-line investor summary: current trend, forecast, risk, and final recommendation."

Final AI-Based Business Decision

- Prompt: "Based on both business and stock data, suggest 3 strategic actions for the next quarter."

Email Management with Gemini and Gmail

Learning Outcomes

- • Reply to emails using AI-generated content.
- • Understand email context and past threads using Gemini.
- • Retrieve files from Google Drive directly within Gmail.
- • Translate emails into calendar events.
- • Schedule meetings using AI-suggested times.

Gemini-Powered Email Scenarios

Summarize an Email Thread

- Open the email thread in Gmail.
- Click the Gemini icon.
- Prompt: "Summarize this thread in bullet points."
- Use the summary to quickly understand prior communication.

Write a Professional Email Response

- In the reply section, open Gemini.
- Prompt: "Write a reply that acknowledges receipt and asks for weekly status updates."
- Customize and send the email.

Advanced Response Using Document Context

- Prompt: "Write a professional email to the supplier acknowledging the spec change. Request a side-by-side comparison of A vs B for QA. CC the product compliance team."
- Gemini will generate a complete draft within Gmail.

Drive and Calendar Integration with Gemini

Retrieve Historical Confirmations

- Prompt Gemini: “When did this supplier last confirm delivery of Item #XP-442 with Coating A? Find the email and draft a reply based on it.”

Cross-Check with Documents

- Attach a Drive file or reference it in the conversation.
- Prompt: “Does Coating B meet the approved standards in the attached file?”
- Gemini responds directly – no email draft needed.

Schedule a Meeting

- In Gmail, highlight the suggested time.
- Prompt: “Schedule a meeting at this time.”
- Gemini opens Google Calendar and suggests meeting setup.

PowerPoints with Gamma

Learning Outcomes

- Use ChatGPT to generate professional slide content.
- Enhance PowerPoint presentations using built-in AI tools like Designer and SmartArt.
- Transform or redesign slides using Gamma with uploaded files or prompts.
- Compare different AI presentation tools and apply best practices for visual communication.

Slide Generation with ChatGPT

- Go to chat.openai.com.
- Prompt: “Create a 5-slide presentation about climate change and its impact on cities. Include titles and bullet points.”
- Copy the output into PowerPoint Online.

Enhancing Slides with PowerPoint Online

- Paste the ChatGPT content into PowerPoint Online.
- Use Designer: Go to the Home tab → Click the Designer icon.
- Explore suggested designs and layouts.
- Use Insert → SmartArt to convert bullet lists into visual diagrams.
- Use Insert → Images → Stock Images to add relevant visuals.
- Optional: Use Alt Text for accessibility and clarity.
- Preview the slides in Presentation Mode.

Enhance or Transform with Gamma

Enhance an Existing PowerPoint:

- Go to Gamma → Create with AI Page.
 - Select “Import File or URL” → Upload your downloaded PowerPoint.
 - Select Visual Import.
 - Choose a theme and whether to keep original or imported layout.
 - Continue to view and adjust slides.

Transform PowerPoint Content in Gamma:

- • Go to Gamma → Create with AI Page.
- Upload your downloaded PowerPoint.
- Choose content setting: Generate, Condense, or Preserve.
- Select amount of text per card: Brief, Medium, or Detailed.
- Choose audience and tone → Continue.

Generate New Slides from Prompts or Outlines:

- • Go to Gamma → Create with AI Page → Select Generate.
- Enter a prompt or outline.
- Select content style: Brief, Medium, or Detailed.
- Customize tone and audience.

Prompt Engineering

Learning Outcomes

- Understand why AI-generated responses can fail.
- Compare weak vs. effective prompts.
- Apply the building blocks of strong prompts: task, context, audience, format, and tone.
- Create targeted prompts for real scenarios: summaries, insights, personas, and more.

Steps to Write a Strong Prompt

Topic: Lebanese stock market summary

1. Start Vague

“Write something about the market.”

2. Add Task + Context

“Summarize recent activity in the Lebanese stock market.”

3. Add Format

“Write a 100-word summary.”

4. Add Audience

“For the investment team.”

5. Add Tone/Style

“Using clear, professional language.”

✓ Final Prompt:

“Write a 100-word summary of recent activity in the Lebanese stock market for the investment team using clear, professional language.”

Prompt Templates for Workplace Use

- PDF Report Extraction

“Summarize this uploaded PDF report into 5 key findings and 3 recommendations, using clear and concise bullet points for internal management review.”

Prompt Segment	Role
Summarize this uploaded PDF report	Task + Context
into 5 key findings and 3 recommendations	Format Constraint
using clear and concise bullet points	Tone/Style Guidance
for internal management review	Audience

- PowerPoint Insight Mapping

“Review this PowerPoint presentation and summarize each slide’s main message in one sentence, using a clear and informative tone for internal documentation.”

Prompt Segment	Role
Review this PowerPoint presentation	Task + Context
summarize each slide’s main message in one sentence	Format Constraint
using a clear and informative tone	Tone/Style Guidance
for internal documentation	Audience

- Competitor Intelligence Briefing

“Summarize this competitor’s pitch deck into a one-page profile covering their value proposition, offerings, target market, and competitive edge.”

Prompt Segment	Role
Summarize this competitor's pitch deck	Task + Context
into a one-page profile covering their value proposition, offerings, target market, and competitive edge	Format Constraint
using clear language	Tone/Style Guidance
for internal strategy use	Audience

- Client Persona Builder

“From these customer survey responses, create 3 client personas with goals, pain points, behaviors, and communication preferences.”

Prompt Segment	Role
From these customer survey responses	Task + Context
create 3 client personas with goals, pain points, behaviors, and communication preferences	Format Constraint
in clear language	Tone/Style Guidance
for the marketing team	Audience

IC Readiness Prompt Templates

- IC Readiness Snapshot

Based on the uploaded proposal and internal commentary, generate a 150-word IC Readiness Snapshot highlighting current status, key strengths, open gaps, and next steps for internal leadership review.

Prompt Segment	Role
Based on the uploaded proposal and internal commentary	Task + Context
generate a 150-word IC Readiness Snapshot highlighting current status, key strengths, open gaps, and next steps	Format Constraint
for internal leadership review	Tone/Style Guidance
	Audience

- Approval Probability Estimate

Evaluate the likelihood of IC approval based on uploaded project materials and recent IC feedback. Rate readiness from 1 to 5 and support with 3 bullet points on sponsor strength, documentation quality, and strategic fit.

Prompt Segment	Role
Evaluate the likelihood of IC approval based on uploaded project materials and recent IC feedback	Task + Context
Rate the readiness from 1 to 5	Format Constraint
support it with 3 bullet points covering sponsor strength, documentation quality, and strategic fit	Tone/Style Guidance
(Implied: for the deal team preparing for IC)	Audience

- Stakeholder Readiness Heatmap

Review internal emails and meeting notes to build a stakeholder readiness heatmap. Categorize each stakeholder as 'Ready,' 'Neutral,' or 'Not Ready,' with a 1-line justification for each to help guide IC preparation.

Prompt Segment	Role
Review internal emails and meeting notes to build a stakeholder readiness heatmap	Task + Context
Categorize each stakeholder as 'Ready,' 'Neutral,' or 'Not Ready'	Format Constraint
with a 1-line justification for each	Tone/Style Guidance
to help guide IC preparation	Audience

Deal Timeline Management Prompts

- Deal Timeline Generator

Extract key phases and milestones from the uploaded deal documents and create a chronological deal timeline covering diligence, negotiation, IC submission, final approvals, and projected close. Format each milestone with a target date and responsible owner.

Prompt Segment	Role
Extract key phases and milestones from the uploaded deal documents	Task + Context
create a chronological deal timeline	Format Constraint
covering diligence, negotiation, IC submission, final approvals, and projected close	Tone/Style Guidance
Format each milestone with a target date and responsible owner	Audience

- Delay-Based Adjustment

Revise the previously generated deal timeline. Adjust target dates for diligence and final approval phases, flag slippages, and output the revised timeline in a table format.

Prompt Segment	Role
Revise the previously generated deal timeline	Task + Context
Adjust target dates for diligence and final approval phases	Format Constraint
flag any slippages	Tone/Style Guidance
output the revised timeline in a table format	Audience

Risk Scenario Simulation Prompts

- Delay Risk Scenario

Based on the uploaded project timeline and internal risk register, simulate the impact of a 3-week delay in diligence completion. Estimate changes to IC

submission, final approval, and deal close. Highlight cascading risks or mitigation steps.

Prompt Segment	Role
Based on the uploaded project timeline and internal risk register simulate the impact of a 3-week delay in diligence completion	Task + Context
Estimate changes to IC submission, final approval, and deal close	Format Constraint
Highlight any cascading risks or required mitigation steps	Tone/Style Guidance
present the output for the deal execution team	Audience

- Regulatory Risk Scenario

Analyze the uploaded deal summary and legal review notes to simulate the impact of a sudden regulatory change affecting cross-border data handling. Summarize the top 3 impacted areas, likely consequences, and 2 mitigation actions.

Prompt Segment	Role
Analyze the uploaded deal summary and legal review notes simulate the impact of a sudden regulatory change affecting cross-border data handling	Task + Context
Summarize the top 3 impacted areas, likely consequences, and 2 mitigation actions	Format Constraint
using clear, executive-friendly language	Tone/Style Guidance
suitable for the decision-making team	Audience

Memo & Document Enhancement Prompts

- Executive Memo Rewrite

Review the uploaded internal memo and rewrite it using clear, concise language. Improve the structure to highlight the problem, key insights, and next steps in a way that is suitable for a C-level executive audience.

Prompt Segment	Role
Review the uploaded internal memo	Task + Context
Improve the structure to highlight the problem, key insights, and next steps	Format Constraint
rewrite it using clear, concise language	Tone/Style Guidance
in a way that is suitable for a C-level executive audience	Audience

- Tone Reframing for Strategy

Analyze this internal memo and adjust the tone to reflect a more strategic and forward-looking perspective. Rephrase key sections to better align with executive expectations while keeping the message intact.

Prompt Segment	Role
Analyze this internal memo	Task + Context
Rephrase key sections to better align with executive expectations	Format Constraint
adjust the tone to reflect a more strategic and forward-looking perspective	Tone/Style Guidance
for the senior leadership team	Audience

Document Comparison Prompts

- Term Sheet Comparison

Compare the two uploaded term sheets and produce a structured comparison covering valuation, governance rights, exit terms, and investor obligations. Highlight key differences in a side-by-side table.

Prompt Segment	Role
Compare the two uploaded term sheets	Task + Context
produce a structured comparison covering valuation, governance rights, exit terms, and investor obligations	Format Constraint
using concise language	Tone/Style Guidance
for advisory committee review	Audience

- Strategic Proposal Comparison

Analyze the two uploaded strategic proposals and generate a comparison summary focusing on risk exposure, operational feasibility, and strategic alignment. Present the results in bullet points with flags for legal or financial redlines.

Prompt Segment	Role
Analyze the two uploaded strategic proposals	Task + Context
generate a comparison summary focusing on risk exposure, operational feasibility, and strategic alignment	Format Constraint
Present the results in bullet points with clear flags for legal or financial redlines	Tone/Style Guidance
suitable for corporate advisory leadership	Audience

LinkedIn Automation

Learning Outcomes

- Build a targeted lead list using LinkedIn Search Export.
- Passively increase your profile visibility using Auto-Liker.
- Automatically welcome new LinkedIn connections.
- Generate AI-enhanced LinkedIn posts with MagicPost.

Build a Smart Lead List

Tool: PhantomBuster – LinkedIn Search Export

1. Go to PhantomBuster.com → Solutions → LinkedIn.
2. Search for LinkedIn Search Export → Click 'Use this Phantom'.
3. Switch to Advanced Setup.
4. On LinkedIn, search: FinTech Founder United Kingdom.
5. Copy the LinkedIn search URL.
6. Paste the URL into PhantomBuster.
7. Limit results to 10 for safe testing.
8. Select Manual Launch → Save & Run.
9. Export the CSV with names, roles, and URLs.

Stay Visible with Passive Engagement

Tool: PhantomBuster – LinkedIn Auto Liker

1. Go to PhantomBuster.com.
2. Search for LinkedIn Auto Liker.
3. Click 'Use this Phantom'.
4. Choose URL input method.
5. Paste profile URLs of 2–3 relevant founders or investors.
6. Connect your LinkedIn account.
7. Save and launch.

Welcome New Connections Automatically

Tool: PhantomBuster – LinkedIn New Connection Welcome Message

1. Go to PhantomBuster.com.

2. Search for LinkedIn New Connection Welcome Message.
3. Connect your LinkedIn account.
4. Set a welcome message

Generating Content with MagicPost

Create a Post from Scratch

1. Click 'New Post'.
2. Select Post Type (e.g., Story, Actionable)
3. Select Category (e.g., Lessons Learned).
4. Enter Subject (e.g., 'What I learned about founder evaluation').
5. Use Advanced Options to preview, edit, or schedule.
6. Add images or modify with AI.
7. Publish or save as a draft.

Work with Templates, Hooks & Ideas

- Templates: Insert and adjust similarity.
- Hooks: Enter a keyword → generate post starters.
- Ideas: Choose a theme and category → generate post ideas.
- My Posts & Metrics: Track drafts, published posts, and engagement.

AI in Marketing

Learning Outcomes

- Generate marketing content using Gemini and Google AI Studio prompts.
- Create targeted posts for Instagram, email campaigns, and product descriptions.
- Structure campaign briefs, personas, and content calendars for effective outreach.
- Analyze campaign results and customer sentiment to improve future marketing efforts.

AI Marketing Prompts with Gemini & AI Studio

- Instagram Post: “Write an Instagram post for a sustainable clothing brand's fall collection. Include a caption, 3 emojis, and 5 relevant hashtags.”
- Email Subject A/B Test: “Write two subject lines and preview texts for a limited-time free shipping promo for an e-commerce brand.”
- Short Product Description: “Write a 2-sentence product description for a noise-canceling travel headphone targeting digital nomads.”
- Blog Outline: “Generate a blog post outline titled ‘5 Ways AI is Transforming Small Business Marketing’.”
- Marketing Persona: “Create a persona for a mid-30s tech-savvy urban professional interested in smart home products.”
- Campaign Brief: “Write a short campaign brief for launching a new fitness app, targeting Gen Z on TikTok.”
- Post Variations for Testing: “Generate 3 variations of a tweet promoting an upcoming virtual webinar on digital marketing.”
- Content Calendar: “Create a 5-day content calendar for a wellness brand. Include platform, post idea, and goal.”
- Campaign Performance Breakdown: “Analyze campaign data from email, Instagram, and LinkedIn to identify what's working, what's underperforming, and suggest 3 changes.”
- Customer Feedback Sentiment Analysis: “Summarize the top 2 pain points and top 2 positives. Suggest 1 product and 1 marketing improvement.”
- Competitive SWOT Summary: “Create a SWOT analysis comparing competitor FitTrack (deep sleep monitoring) to SmartPulse (heart rate and habit tracking).”