

Intro to Copilot for Excel

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Resources:

<https://github.com/stringfestdata/ai-week-intro-copilot-excel/archive/refs/heads/main.zip>

About Me

- Microsoft Excel MVP
- Author, Modern Data Analytics in Excel
- Founder, Stringfest Analytics
- Trainer & Consultant in Excel, AI, and Data Analytics

Agenda

1. Analyze Data: Free early alternative to Copilot
2. Power Query for clean, structured data
3. Copilot on penguins data: formatting, calculated columns, charts, PivotTables 
4. (time permitting) Advanced Analysis with Python 

Starting Point

- Workbook: wholesale-customers.xlsx
- Explore Analyze Data for quick insights
- Try natural language querying
- How can we get better results with cleaner data?

Why Power Query?

- Copilot works best with clean, structured data
- Power Query makes data machine-readable
- Ensures better results with Copilot and Analyze Data

Moving to penguins.xlsx

- Getting data Copilot-friendly
- Formatting data as a Table
- Creating calculated columns
- Building summary charts
- Using PivotTables
- Exploring advanced analysis with Python in Excel

Key Takeaways

- Use tables for clean, structured data
- Use good names and refer to them early and often
- Don't be afraid of Python code ... it's a big part of Excel's future!

Wrap Up

- Any questions?
- Resources: <https://github.com/stringfestdata/ai-week-intro-copilot-excel/archive/refs/heads/main.zip>
- Follow me: stringfestanalytics.com
- Connect: [linkedin.com/in/gjmount](https://www.linkedin.com/in/gjmount)
- Free until end of year: Copilot in Excel Course:
- <https://www.linkedin.com/learning/excel-with-copilot-ai-driven-data-analysis>

Thank You!

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