LIVE WORKSHOP

AI in Excel Masterclass

With George Mount

hosted by Tobias Zwingmann

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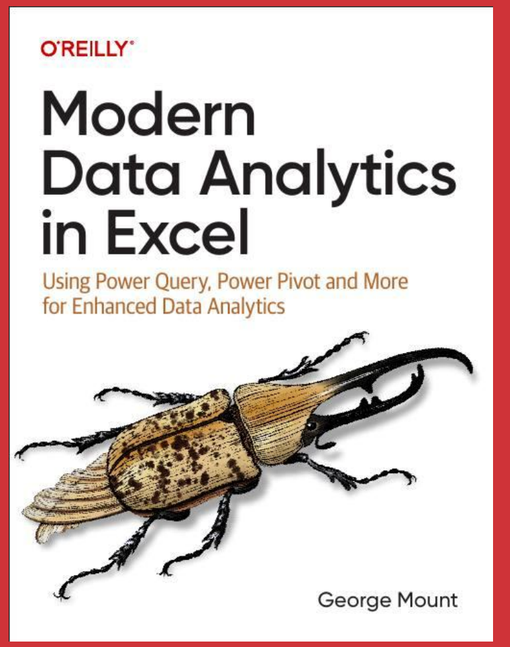
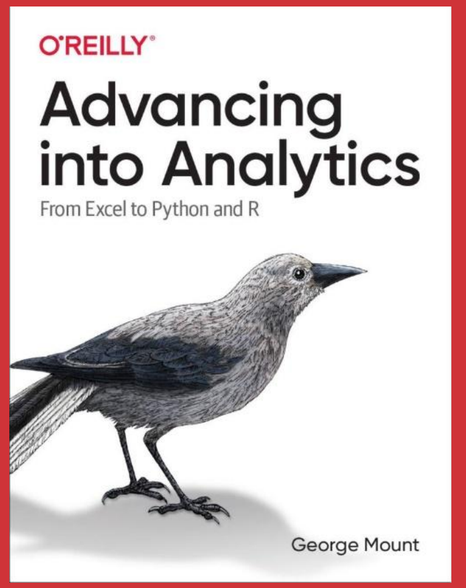
About me

I'm an [in]structor

LinkedIn Learning





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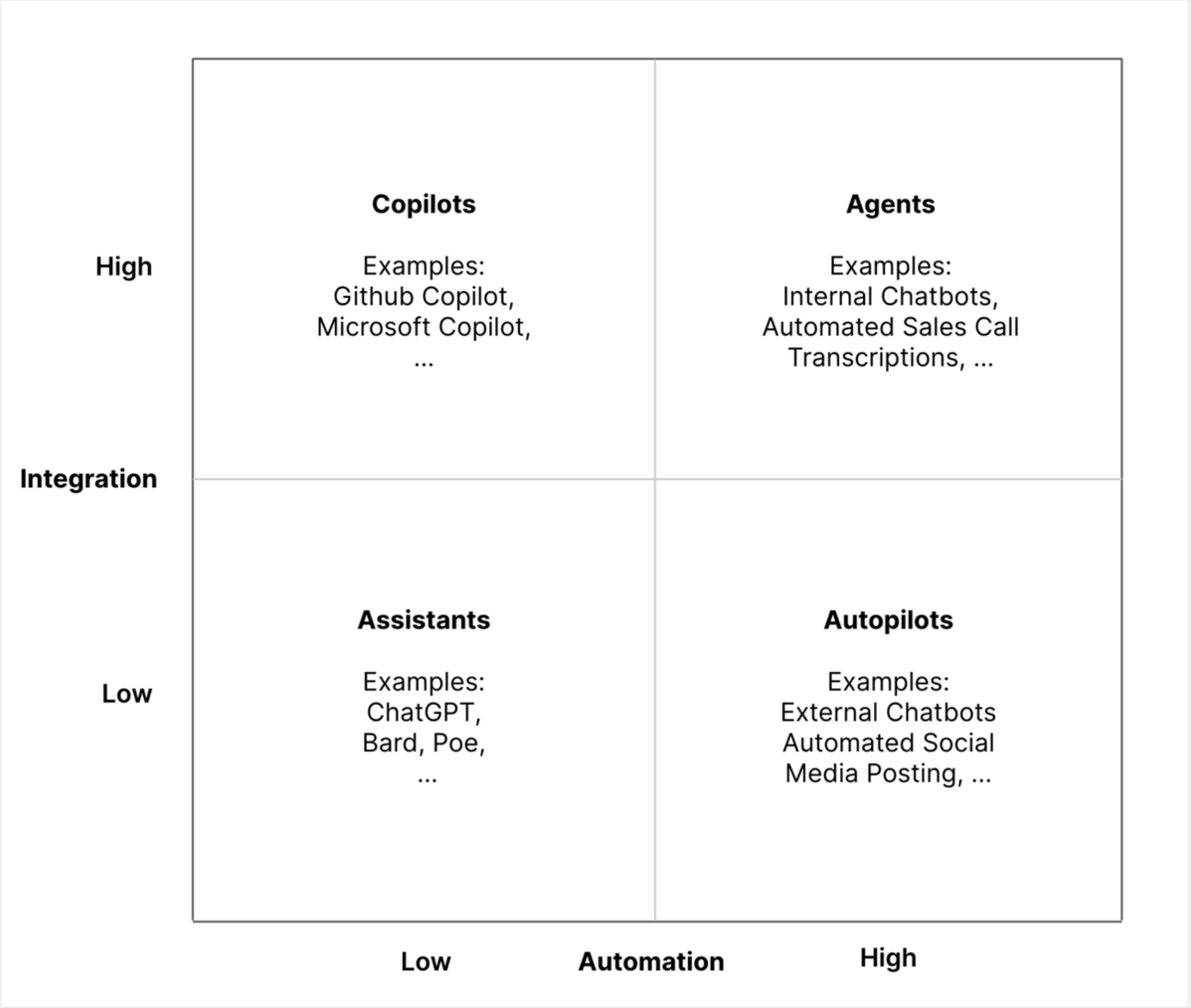
Objectives for this session

- Structured data foundations with Tables & Power Query
- Instant insights with Copilot, PivotTables & charts
- Python in Excel for flexible analysis
- Agent Mode in action and how it relates vs Copilot
- The new AI-powered Excel workflow

Exercise files for today

- Download at https://github.com/stringfestdata/profitable-ai-copilot-excel/archive/refs/heads/main.zip
- Be sure to decompress folder

The integration-automation AI framework



https://blog.tobiaszwingmann.com/p/integration-automation-ai-framework

Starting point: Analyze Data

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

Why Power Query?

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

Studying penguins with Copilot

1. Workbook: `penguins.xlsx`
2. Getting data Copilot-friendly
3. Formatting data as a Table
4. Creating calculated columns
5. Building summary charts
6. Using PivotTables
7. Exploring advanced analysis with Python in Excel

Excel Copilot vs Excel Agent Mode

Feature	Excel Copilot	Agent Mode
Interaction	One-shot prompts	Iterative, self-guided workflow
Task Scope	Single actions (formulas, charts, summaries)	Multi-step processes across sheets
Error Handling	User re-prompts or fixes	Agent reviews, retries, self-corrects
User Role	You do, Copilot helps	You manage, Agent executes
Output Quality	Fast but shallow	Verified and repeatable
Best For	Quick wins, ad-hoc tasks	Structured, high-stakes workflows
Analogy	Smart assistant	Junior analyst

Demo: Agent Mode in action

1. Loan calculator
2. Variance analysis
3. Monthly close pack

What does Agent Mode do well, poorly, or not at all?

How does this relate to other tools in the Excel AI stack?

The emerging Excel AI stack

Stage	Purpose	Tools
1. Data Foundation	Store, structure, and retrieve data	Power BI, Dataverse
2. Data Preparation	Clean, shape, and combine data	Power Query/Dataflows
3. Analysis & Intelligence	Explore data and get insights	Excel (with Copilot, Python, Agent Mode)
4. Automation & Extension	Repeat, scale, and connect processes	Office Scripts, Power Automate
5. Customization & Governance	Control, deploy, and monitor AI agents	Copilot Studio

Wrap-up and resources

1. What questions do you have?
2. Resources: https://github.com/stringfestdata/profitable-ai-copilot-excel/archive/refs/heads/main.zip
3. Follow me: stringfestanalytics.com
4. Connect: linkedin.com/in/gjmount
5. Free until end of year: Copilot in Excel course at https://www.linkedin.com/learning/excel-with-copilot-ai-driven-data-analysis

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Questions?

Thank you