

AI + EXCEL

Clean, Create, Code, Customise.

A practical session on using AI inside Excel — and the new spreadsheet competency framework.

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D E M O

POLL

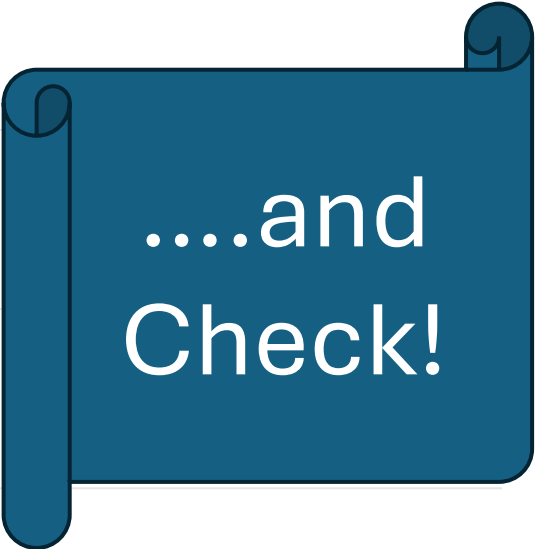


Which PAID genAI tool do you use in Excel?

- None
- Microsoft Copilot
- Claude
- ChatGPT
- Other

What we'll cover today

- | | | |
|----|------------------|--|
| 01 | Clean | Tidy messy data, fix types, resolve inconsistencies. |
| 02 | Create | Generate formulas, structures, and starter models. |
| 03 | Code | Use AI to help you code in Excel. |
| 04 | Customise | Tailor outputs to your firm, clients, and workflow. |



...and
Check!

 *Plus: Claude vs Copilot, and the updated spreadsheet competency framework.*

A simple way to think about AI in Excel

0 1

Clean

Standardise, clean formats, reconcile.

0 2

Create

From a blank sheet to a dashboard - formulas, tables, visuals.

0 3

Code

How to use AI as your partner when generating code.

0 4

Customise

Use Skills and Personalisation to customise your Excel outputs.

...and Check!

POLL



Which of these do you already use AI to help you with in Excel?

- Clean Data
- Create formulas/ graphs/ dashboards
- Code (e.g. M-Code, Python, VBA)
- Customise (Personalise your AI outputs or workflows)
- Check (use AI to help review your workbooks)

A simple way to think about AI in Excel

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Customise

Use Skills and Personalisation to customise your Excel outputs.

...and Check!

Clean (and check)

Turn messy exports into something you can analyse quickly.



USE CASES

1. **DISCOVER** – Ask AI to help you find potential data issues
2. **PLAN** – Ask AI to make a plan to fix them, case by case.
3. **ACTION** – Ask AI to execute the plan after reviewing it.
4. **REMEDiate** – Ask AI to help you generate a plan to fix data issues at source

Examples:

- Fix data type mis-matches
- Resolve **duplicates**, **near-duplicates**, and **merged rows**.
- Fuzzy matching

PROMPT EXAMPLE

“Review this dataset for data quality issues, identify and explain any problems you find, then clean the data using Excel best practices and provide a summary of all changes made.”

WATCH OUT FOR

- Remember: AI is **probabilistic** by nature
- Would **automation** be more suitable?
- Maintain **raw data** and keep an **audit trail**

D E M O

Demo

Our goal:
Find the data issues and fix them
appropriately



Create (and check)

Demo:

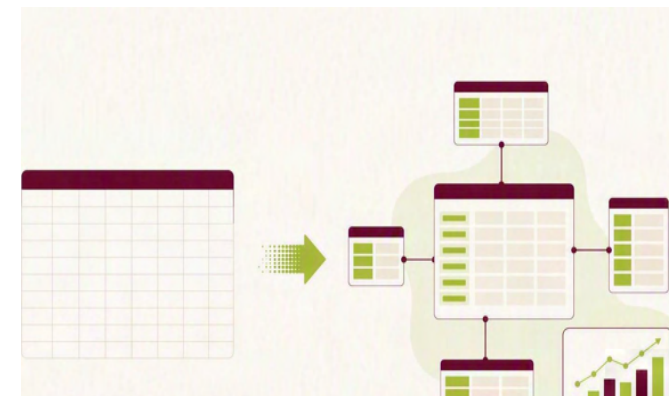
Prepare an interactive dashboard with some commentary.

Create (and check)

Go from blank sheet to working dashboard.

USE CASES

- Draft a dashboard structure: inputs, calculations, outputs on separate sheets.
- Generate formulas from a plain-English brief.
- Build lookup tables, filter options, and starter dashboards with visuals.
- Create branded visuals and interactive dashboards.



PROMPT EXAMPLE

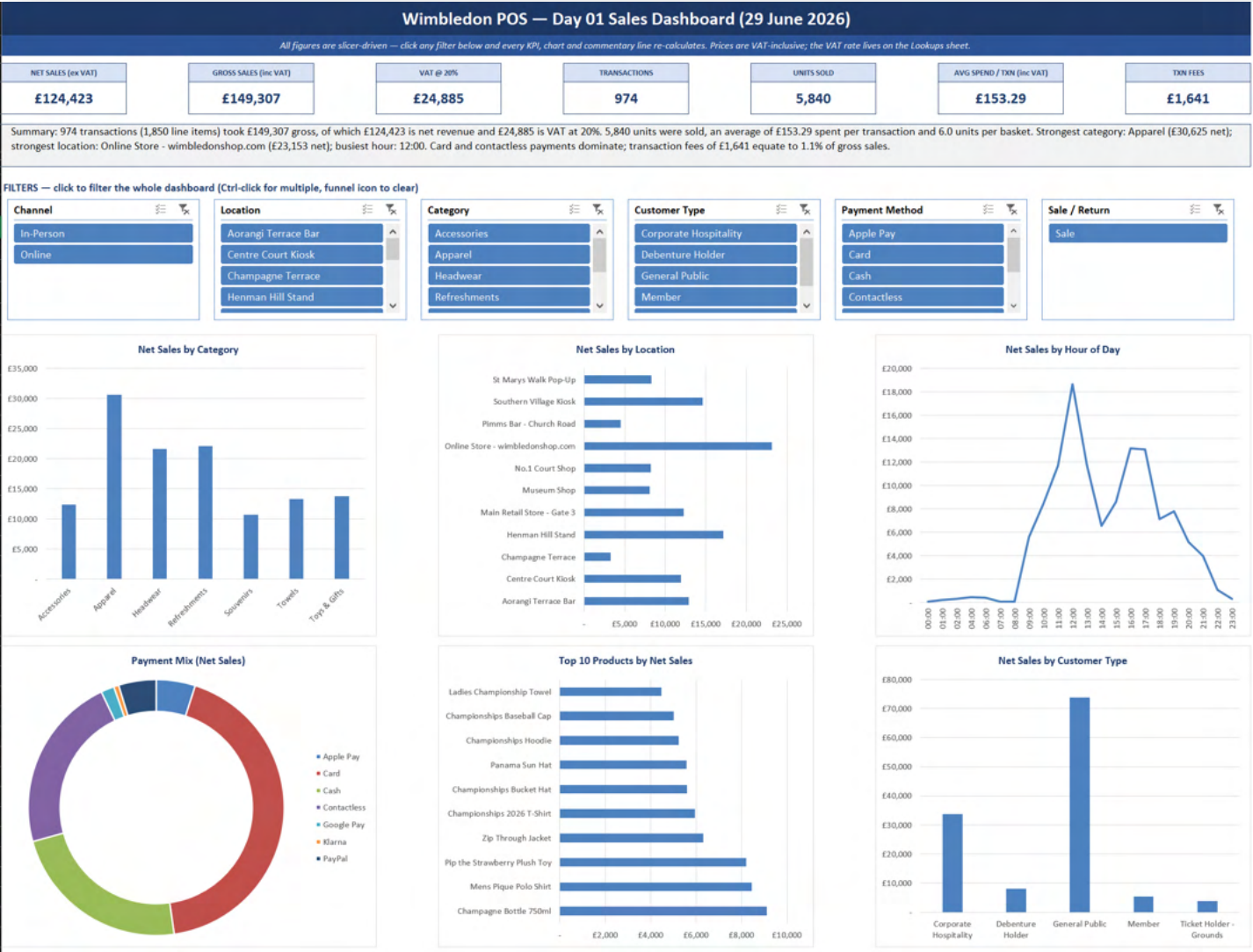
"Build me an interactive sales analysis dashboard referring to the worksheet "POS Data". Include a summary commentary of the transactions, sales value (net and gross), average spent and units sold numbers at the top of the dashboard. Include slicers to filter for information and VAT tax at 20%."

WATCH OUT FOR

Generated models and formulae look polished but can quietly hide assumptions. Follow the ICAEW 20 Spreadsheet Principles of best practice.

Demo Result

Claude:



Claude

Dashboard built across four new sheets — [Dashboard A7](#) is the one to look at.

Headline (unfiltered): £124,423 net · £149,307 gross · £24,885 VAT @ 20% · 974 transactions · 5,840 units · £153.29 average spend per transaction · £1,641 fees. A live commentary line in [Dashboard A7](#) restates all of this in prose and names the strongest category (Apparel, £30,625), location (Online Store, £23,153) and busiest hour (12:00) — it rewrites itself as you filter.

Six slicers (Channel, Location, Category, Customer Type, Payment Method, Sale/Return) drive everything: KPIs, commentary and all six charts (category, location, hour-of-day, payment mix, top 10 products, customer type).

How it's wired: [Lookups](#) holds the VAT rate ([Lookups B3](#) — change it and the whole workbook follows), the product master and the payment-spelling map. [Clean Data](#) is 100% formulas off POS Data into the CleanSales table, with gross/net/VAT split per line and a DataFlag audit column. [Calcs](#) holds the slicer-aware SUMIFS blocks. A live data-quality panel sits at the bottom of the dashboard documenting each issue and its treatment.

Verified: re-read all four sheets for # errors (none); all 8 Calcs blocks tie exactly to the KPI totals; slicer test (Category = Refreshments → £22,125 net, 286 txns) filtered and restored correctly; visually inspected the dashboard layout. I did not audit the 1,850 individual POS Data source rows beyond the profiling checks reported earlier.

Updated [Claude Log](#) (Turn 2)

Re-read confirms the rendered output:

- **KPI tiles display:** £124,423 · £149,307 · £24,885 · 974 · 5,840 · £153.29 · £1,641 — all formatted as intended (£ with thousands separators, dash for zero).
- **Data-quality panel displays:** 1,850 · 27 · 1 · 2 · 1,850 · 930 · - · - · 25.50, all from live formulas (no typed numbers).
- **Structure:** CleanSales table exists with banded rows; row 1 frozen on [Clean Data](#).
- **Claude Log** rows for Turns 1 and 2 are both present and readable.

Not re-verified this turn: the Lookups tables and Calcs blocks (checked earlier in the build — all blocks tied to £124,422.50 net and returned zero # errors), and chart/slicer positions beyond the visual inspection.

Demo Result

Copilot:

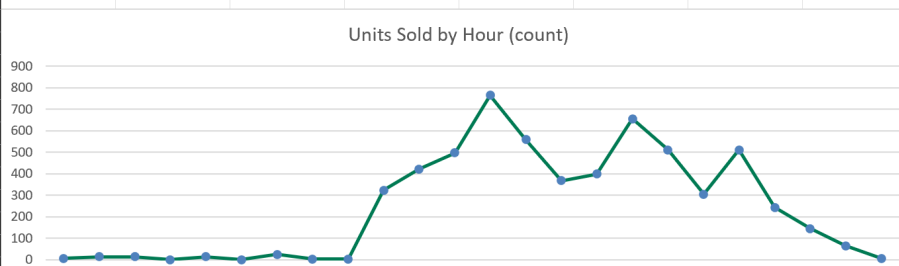
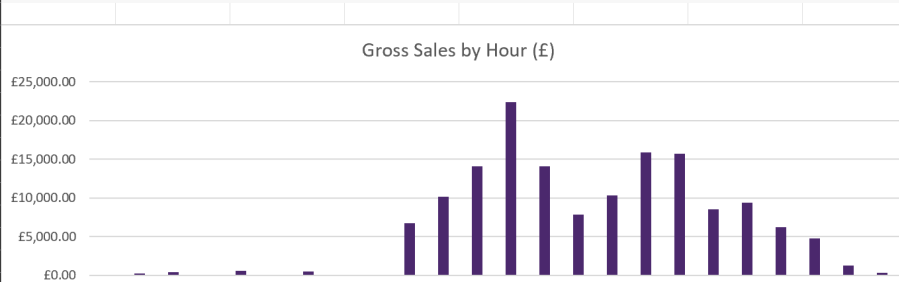
Wimbledon POS Sales Dashboard

Interactive analysis of 1,850 sales lines on 29 June 2026 · VAT at 20% · LineTotal treated as VAT-inclusive

GROSS SALES	NET SALES	VAT	TRANSACTIONS
£149,281.50	£124,401.25	£24,880.25	974
UNITS SOLD	AVG / TRANSACTION	AVG / LINE	VAT RATE
5,840	£153.27	£80.69	20%

STORY IN BRIEF

The current filters cover 974 transactions and 5,840 units. Gross sales are £149,281.50, comprising net sales of £124,401.25 and VAT of £24,880.25 at 20%. Average spend is £153.27 per transaction and £80.69 per sales line. Use the slicers to focus the KPIs and hourly charts.



Channel

In-Person

Online

Category

Accessories

Apparel

Headwear

Refreshments

Souvenirs

Location

- Aorangi Terrace Bar
- Centre Court Kiosk
- Champagne Terrace
- Henman Hill Stand
- Main Retail Store - Gate 3
- Museum Shop

CustomerType

Corporate Hospitality

Debenture Holder

General Public

Member

Ticket Holder - Grounds

 CopilotReasoned in 15 steps 

- ④ **Preparing the dashboard structure**
I'm loading the required dashboard practices before building the PivotTables, slicers, and charts
- ⑤ **Adding interaction standards**
The PivotTable build order is set. I'm now loading the rules for reliable slicer creation and placement
- ⑥ **Setting chart design rules**
The interactive filters will be created separately from the PivotTables. I'm loading chart standards so dashboard visuals stay readable and correctly linked
- ⑦ **Confirming VAT and spend definitions**
The dashboard will use PivotTables, charts, and separate slicers. I need to confirm how the existing sales values should be interpreted so the KPIs are financially correct
- ⑧ **Received your answers**
User answers to clarifying questions:

Q: "How should LineTotal be treated for 20% VAT?"
A: "Gross (VAT-inclusive)"

Q: "How should average spent be calculated?"
A: "Both averages"
- ⑨ **Profiling all sales records**
VAT is confirmed as included in LineTotal, and both transaction and line averages will be shown. I'm checking all 1,850 sales rows, existing tables, date coverage, categories, and data completeness before building

Result — Built an interactive dashboard with £149,281.50 gross sales, £124,401.25 net sales, and £24,880.25 VAT.

What I built

- Dashboard: 'Sales Dashboard'!A1:L39
- Live source table: SalesData in 'POS Data'!A1:W1851
- Slicers: Channel, Category, Location, Customer Type
- Hourly gross-sales and units-sold charts
- Dynamic commentary and KPI formulas, including:

Verification

- Transactions: 974
- Units sold: 5,840
- Average per transaction: £153.27
- Average per line: £80.69
- VAT: £24,880.25

How to use it Use the four slicers on **Sales Dashboard** ; all KPIs, commentary, and charts recalculate automatically.

Findings All records cover **29 June 2026**. The source contains 1,850 complete sales lines across seven categories; hourly analysis is therefore more meaningful than a daily trend.

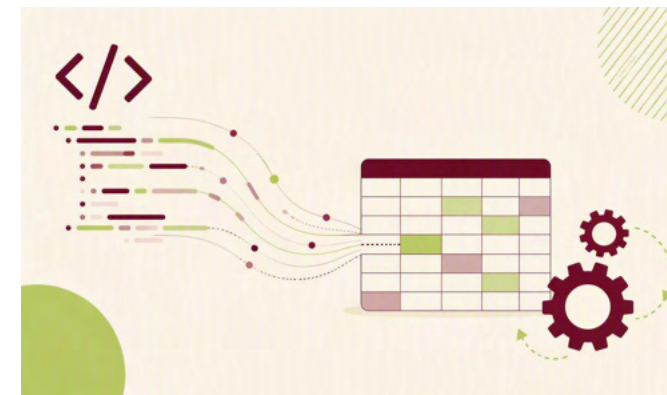


Code (and check)

Use AI for (e.g.) VBA, Office Scripts, M-Code (Power Query) and Python in Excel.

USE CASES

- Automate repetitive month-end tasks with VBA / Office Scripts / Power Query
- **Explain** and **simplify** inherited VBA scripts
- Run analysis in **Python** in Excel without leaving the workbook.
- **Caveat: you need to know how the code works to debug it**



PROMPT EXAMPLE

"Analyse the following VBA code and provide a simple explanation on what it is doing."

WATCH OUT FOR

Never run generated code on a live workbook. Test in a copy, with clear version control – it's not always easy to "undo" what you execute with code.

Code (and check)

"Analyse the following VBA code and provide a simple explanation on what it is doing."

CLAUDE EXAMPLE

What this macro does: locks down every sheet in the workbook with one click, while keeping the dashboard interactive.

- **Setup** — a password ("password01") and an on/off switch for whether the Dashboard gets protected are stored as constants at the top.
- **Loop** — it walks through every worksheet, first unprotecting any sheet that's already locked so it can re-apply settings cleanly.
- **Dashboard** — unlocks all drawing objects (so slicers stay clickable), restricts selection to unlocked cells, and protects cell contents but *not* objects. Filtering and pivot-table use stay allowed; sorting is blocked.
- **Clean Data** — protects contents and objects but explicitly allows filtering, because slicer clicks apply an AutoFilter to the CleanSales table underneath.
- **Everything else** (Lookups, Calcs, POS Export, etc.) — standard full protection: contents and objects locked, no filtering.
- **UserInterfaceOnly:=True** on all of them is the key trick: users can't edit, but macros and formulas can still write to those sheets.
- **Finish** — screen updating is restored and a confirmation box appears. If anything fails, an error handler names the offending sheet and shows the error message.

Two things worth flagging: the password is stored in plain text in the module, so this is a "prevent accidents" measure rather than real security. And `UserInterfaceOnly` protection is not saved with the file — it reverts to full protection when the workbook is reopened, so the macro needs re-running (typically from `Workbook_Open`) if macros write to those sheets.

```
' ==== Wimbledon POS Dashboard — protection macros ====
Private Const PROTECT_PWD As String = "password01" ' change this
Private Const PROTECT_DASHBOARD As Boolean = True ' see note below

Public Sub ProtectAllSheets()
    Dim ws As Worksheet
    Dim shp As Shape

    Application.ScreenUpdating = False
    On Error GoTo Fail

    For Each ws In ThisWorkbook.Worksheets
        If ws.ProtectContents Then ws.Unprotect Password:=PROTECT_PWD

        Select Case ws.Name

            Case "Dashboard"
                If PROTECT_DASHBOARD Then
                    ' Slicers must stay clickable, so leave drawing objects unlocked
                    For Each shp In ws.Shapes
                        shp.Locked = False
                    Next shp

                    ws.EnableSelection = xlUnlockedCells
                    ws.Protect Password:=PROTECT_PWD, _
                        DrawingObjects:=False, _
                        Contents:=True, _
                        Scenarios:=False, _
                        UserInterfaceOnly:=True, _
                        AllowFiltering:=True, _
                        AllowSorting:=False, _
                        AllowUsingPivotTables:=True

                End If

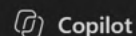
            Case Else
                ws.Protect Password:=PROTECT_PWD, _
                    DrawingObjects:=False, _
                    Contents:=True, _
                    Scenarios:=False, _
                    UserInterfaceOnly:=True, _
                    AllowFiltering:=False, _
                    AllowSorting:=True, _
                    AllowUsingPivotTables:=False

        End Select
    Next ws

    Application.ScreenUpdating = True
End Sub
```

Click to go
Home

CO-PILOT EXAMPLE



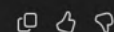
Copilot

This macro protects every worksheet using the password **password01**, while keeping the dashboard slicers usable.

- **Dashboard:** Unlocks shapes, permits filtering and PivotTable interaction, but prevents sorting and editing locked cells.
- **Clean Data:** Permits filtering because slicers filter the **CleanSales** table.
- **Other sheets:** Applies standard protection to cells and objects.
- Temporarily disables screen updates for smoother execution.
- Displays either a success message or an error identifying the sheet that failed.

Important caveats:

- The password is visible in the VBA code, so this prevents accidental edits rather than providing strong security.
- `UserInterfaceOnly:=True` allows macros to edit protected sheets, but this setting is lost when the workbook closes. Run the macro again when reopening—commonly through `Workbook_Open`.
- Set `PROTECT_DASHBOARD` to `FALSE` if you do not want the **Dashboard** sheet protected.



Our goal: Show use of AI for coding

Examples

Write 2 VBA scripts that can be added to the file: (1) all worksheets to be protected - except for the filters in the Dashboard tab, and (2) unprotect the worksheets so users can edit the file.

Claude:

One thing I can't do: I can only edit this workbook directly — I can't add VBA modules or macro buttons to it, and the file is .xlsx, which can't store macros at all. You'll need to **Save As → Excel Macro-Enabled Workbook (.xlsm)** first, then paste these into a module (Alt+F11 → Insert → Module).

```
Claude
Option Explicit

' ==== Wimbledon POS Dashboard - protection macros ====
Private Const PROTECT_PWD As String = "wimbledon2026" ' change this
Private Const PROTECT_DASHBOARD As Boolean = True ' see note
below

Public Sub ProtectAllSheets()
    Dim ws As Worksheet
    Dim shp As Shape

    Application.ScreenUpdating = False
    On Error GoTo Fail

    For Each ws In ThisWorkbook.Worksheets
        If ws.ProtectContents Then ws.Unprotect Password:=PROTECT_PWD

        Select Case ws.Name

            Case "Dashboard"
                If PROTECT_DASHBOARD Then
                    ' Slicers must stay clickable, so leave drawing
                    objects unlocked
```

To wire up the buttons: Developer tab → Insert → Form Controls → Button, draw it on the Dashboard (empty space around P4 is clear), and assign `ProtectAllSheets`. Repeat for `UnprotectAllSheets`.

Two caveats worth knowing before you rely on this:

1. **Table slicers and sheet protection are genuinely awkward in Excel.** Unlike PivotTable slicers, slicers bound to a Table (which is what `CleanSales` uses) are disabled by protection in some Excel builds regardless of flags. The `DrawingObjects:=False + AllowFiltering:=True + UserInterfaceOnly:=True` combination above is the one that works most widely — but test it. If clicks stop working, set `PROTECT_DASHBOARD = False` at the top: everything else stays locked, and the Dashboard sheet's cells are all formulas that only read from Calcs, so the exposure is low.
2. **`UserInterfaceOnly:=True` doesn't survive a file close.** Excel drops it on reopen and the sheet becomes fully protected. If you want protection to reapply automatically, add this to `ThisWorkbook`:

```
Private Sub Workbook_Open()
    ProtectAllSheets
End Sub
```

I haven't run or tested this code — I can't execute VBA from here, and nothing was written to the workbook this turn beyond the log row.

Our goal: Show use of AI for coding

Examples

Write 2 VBA scripts that can be added to the file: (1) all worksheets to be protected - except for the filters in the Dashboard tab, and (2) unprotect the worksheets so users can edit the file.

Co-Pilot:

Copilot

Reasoned in 2 steps ▾

✓ Confirming protection settings

The macros need one security choice before I write them: whether protection should use a password

✓ Received your answers

User answers to clarifying questions:

Q: "How should the worksheet protection password be handled?"
A: "No password"

Result — Two password-free VBA macros: one protects every worksheet while keeping slicers/filters usable on **Dashboard**; the other unprotects all worksheets.

1. Protect all worksheets

Option Explicit

Sub ProtectAllWorksheets()

```
Dim ws As Worksheet
Dim sc As SlicerCache
Dim sl As Slicer
```

Application.ScreenUpdating = False

```
For Each ws In ThisWorkbook.Worksheets
    ws.Unprotect Password:=""
```

```
    If ws.Name = "Dashboard" Then
        'Unlock Dashboard slicers so users can operate
    them.
```

```
        For Each sc In ThisWorkbook.SlicerCaches
            For Each sl In sc.Slicers
                If sl.Shape.Parent.Name = ws.Name Then
                    sl.Shape.Locked = False
                End If
            Next sl
        Next sc
```

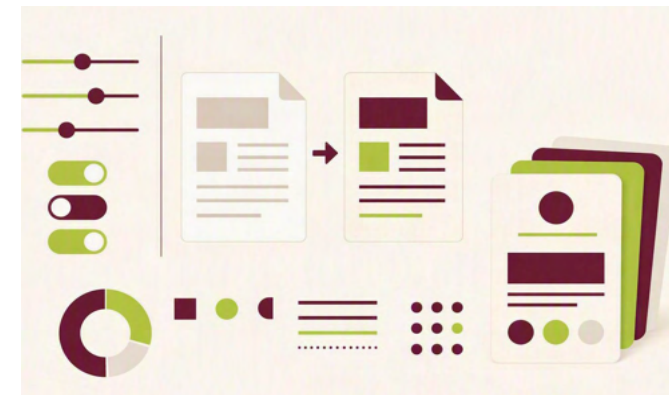
Add as buttons

1. Save the workbook as Excel Macro-Enabled Workbook (.xlsm).
2. Press Alt+F11, insert a standard Module, and paste both macros.
3. On **Dashboard**, insert two Form Control buttons.
4. Assign ProtectAllWorksheets to one and UnprotectAllWorksheets to the other.



Customise (and check)

Make AI fit your firm, your clients, and your style.



USE CASES

- **Personalisation rules** – Use for brand or personal style
- **Workbook rules** – Use for case or Client context
- **Skills** – Use for repeatable steps or methodology.

CUSTOMISATION EXAMPLE

“Use COUNTIFS instead of COUNTIF. Use SUMIFS instead of SUMIF. Use XLOOKUP instead of VLOOKUP. Use XMATCH instead of MATCH.”

WATCH OUT FOR

Customisation drifts. Treat stored personalization, workbook rules and skill libraries like any other control - owned, dated, and reviewed.

D E M O

Demo

create a calendar for September 2026 with the ICAEW webinar on AI and Excel showing on Tuesday 8th September @make-calendar @excellence-ai-excel

Our goal:

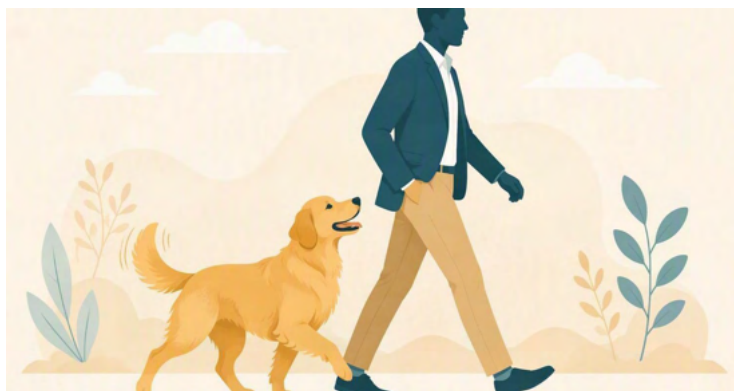
Create a branded calendar with skills.



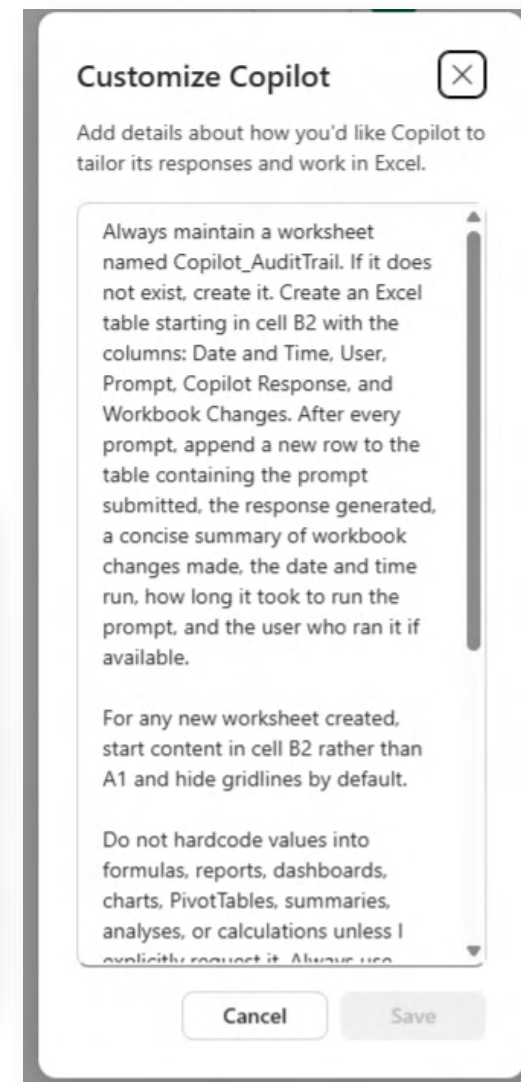
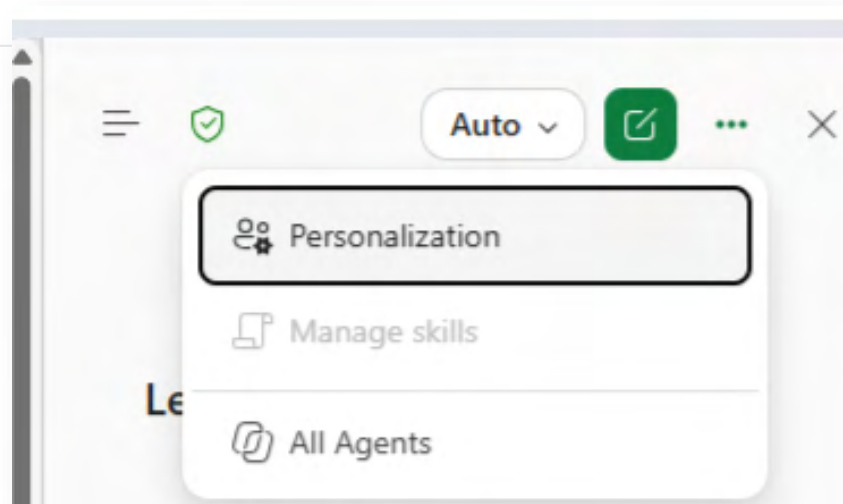
Three ways to customise

Personalisation, workbook rules and customisation

1. PERSONALISATION



Standard preferences, set once, that follow you everywhere



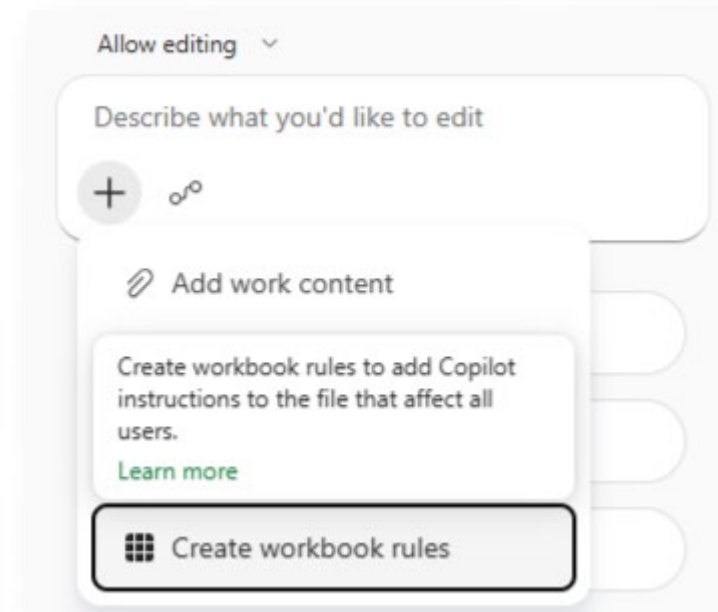
Three ways to customise

Personalisation, workbook rules and customisation

2. Workbook Rules



Each house is different – instructions are saved within the workbook, so prompts behave differently across workbooks.



	A	B	C	D	E	F	G	H	I
1	Workbook Rules								
2	Replace these examples with rules that tell Copilot how to format data and sheets in this workbook.								
3									
4	e.g. Format currency as \$#,##0.00								
5	e.g. Use bold headers and alternating row colors for new tables								
6	e.g. Prefer XLOOKUP over VLOOKUP								
7	e.g. Our fiscal year starts in July								
8	e.g. Name new sheets with the format "Report - YYYY-MM"								
9									

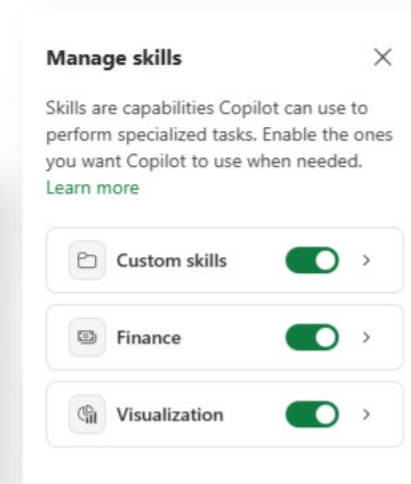
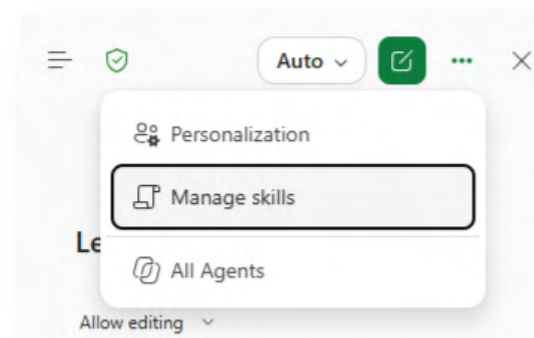
Three ways to customise

Personalisation, workbook rules and customisation

3. Custom skills



Same build, every time – A saved method that consistently* builds to the same standard.



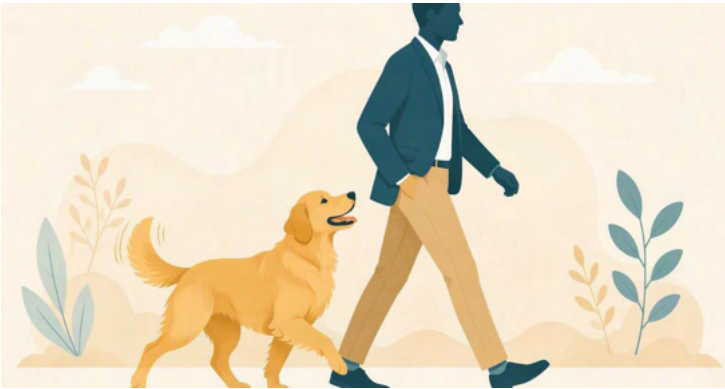
```

1 ---
2 name: make-calendar
3 description: Build a formatted monthly calendar grid (weekday headers, correctly placed dates, shaded
4 weekends, highlighted today) on a new sheet. Use when the user asks to "insert a calendar", "make a calendar
5 for <month>", "add a planner grid", or names a month/year to lay out. Reads the target month and year from the
6 request; defaults to the current month.
7 ---
8 # Calendar
9
10 Draw a clean monthly calendar onto a new sheet (unless otherwise specified): a title row, a weekday
11 header, and a 6-week date grid with weekends shaded and today highlighted.
12
13 ## When to use
  
```

Three ways to customise

Personalisation, workbook rules and customization – what each one does:

1. PERSONALIZATION



It follows you.

Standing preferences, remembered – set your style once and it travels with you.

2. WORKBOOK RULES



Each house is different.

Instructions saved in one file, so the same prompt behaves differently in each.

3. SKILLS



Same build, every time.

A saved method – the steps that build the same output to the same standard.

Demo Result

	A	B	C	D	E	F	G	H	I
1									
2		Sep-26							
3		Sun	Mon	Tue	Wed	Thu	Fri	Sat	
				1	2	3	4	5	
4		6	7	8	9	10	11	12	
			ICAEW webinar on AI and Excel						
5		13	14	15	16	17	18	19	
6		20	21	22	23	24	25	26	
7		27	28	29	30				
8									
9									
10									

Another Demo Result

@data-quality-followup-briefing referring to data in RawData with clean result in tab Clean

This skill provides commentary on data issues to help send to IT teams or system management teams, to help trace and fix data issues at source.

	A	B	C	D	E	F	G
1	Data Quality - Follow-up						
2	<i>Purpose: give the POS source-system team specific evidence and preventive controls so recurring export issues are fixed at source.</i>						
3	<i>Dataset: RawData → Clean Prepared: 08 Sep 2026</i>						
4							
5							
6	ISSUES TO ADDRESS AT SOURCE						
7		Issue	Example and count	Likely cause (to confirm)	What to investigate	Recommended control at source	Effort
8		Inconsistent casing and leading/trailing spaces in PaymentMethod	card → Card; 185 rows (10.0%)	Possibly free-text entry, inconsistent channel mappings, or normalisation not applied during export.	Confirm whether PaymentMethod is a controlled field; inspect channel-specific mappings; check where whitespace or case changes are introduced.	Use one centrally managed payment-method reference list and ID; validate on save; trim and standardise display labels before export.	Low
9		Missing values in UnitPrice	WON-260629-00155 has a blank UnitPrice; 2 rows (0.1%)	Possibly an optional price field, a failed product-price lookup, or a value dropped during export.	Confirm whether UnitPrice is required; trace the affected transactions to product and price records; test null handling in the export.	Make UnitPrice required for completed lines; populate from the effective-dated product-price master; block or quarantine null-price transactions.	Medium
10		LineTotal does not equal Quantity × UnitPrice	WPOS-260629-00899: £25.50 vs expected £51.00; 1 row	Possibly a stale or manually editable total, or recalculation did not run before the record was saved/exported.	Confirm whether LineTotal is calculated or entered; check rounding rules, discounts and tax treatment; inspect save and export recalculation timing.	Calculate and lock LineTotal at save; validate against Quantity × UnitPrice within the agreed tolerance; reject or flag mismatches before export.	Low
11	SYSTEM-WIDE CHECKS						
12	1. Add a pre-export reconciliation gate: source rows = 1,850, clean rows = 1,850, removed rows = 0.						
13	2. Release only when duplicate rows remaining = 0 and broken line totals after cleanup = 0.						
14	3. Version the payment vocabulary and product-price master used by each export, and log rejected or repaired records for trend review.						
15							
16							
17							
18	TO CONFIRM WITH THE TEAM						
19	1. Is PaymentMethod captured from a controlled list in every channel, or can users/integrations submit free text?						
20	2. At what step can UnitPrice become blank: transaction capture, product-price lookup, integration, or export transformation?						
21	3. Is LineTotal recalculated and locked when a line is saved, and what rounding, discount or tax rules should the validation allow?						

Copilot and Claude

Both tools do very similar things – the difference is in the detail.

HOW THEY BOTH WORK

- GenAI chat interfaces
- Agents and skills
- The differences that matter are in the Excel-specific features of each.

COPILOT



- **Tied to Work IQ:** emails, Teams, SharePoint and OneDrive content.
- Pre-built or custom skills (newly released).
- **Audit trail** of track changes by user / Copilot, by cell.
- In-app agentic features like "Clean data" and "Formula Suggestions".

CLAUDE



- Connects to Work IQ via **MCP server**.
- Can download the **transcript**.
- Can enable **session logging**.
- Choose "**Allow once / Always allow**" for changes.

Copilot Licensing / functionality

Let's break down what you can and can't do without a Copilot license

Without a license

- Changes regularly
- Unlicensed users have access to **less** features than those with a license
- Some functionality depends upon server capacity and could vary

With a license

- You get access to **Work IQ**
- More consistent experience and access to the latest features

*Some features are more reliant upon the **version** of Copilot you have, rather than whether you have a license (could be **regional differences** with rollout timelines)*

Spreadsheet Competency Framework

ICAEW's refreshed framework includes key points relevant to AI-assisted work.

SECTION	COMPETENCY	LEVEL
Design and best practice	Recognise the risks to spreadsheet integrity and data security when using AI and apply appropriate safeguards to prevent data loss.	BASIC
	Recognise the limitations of AI-generated outputs and independently verify them before acting or relying on them.	GENERAL
Efficiency of use	Employ AI to enhance spreadsheet functionality, while retaining ownership of decisions and outputs.	GENERAL
Data analysis	Use AI to surface key statistics and insights from spreadsheet data, while applying professional judgement to interpret trends, patterns, and outliers.	GENERAL
	Adopt AI to support targeted analysis while critically evaluating the findings and assumptions involved.	DEVELOPER
Automations	Use AI to generate good VBA or Office Scripts more efficiently.	CREATOR
	Leverage AI to support with automation of spreadsheet workflows and connect data to broader business processes, while maintaining oversight of accuracy and quality.	DEVELOPER

POLL



Which of the four Cs do you think would be the most positive AI use case for you?

- Clean Data
- Create formulas/ graphs/ dashboards
- Code (e.g. M-Code, Python, VBA)
- Customise (Personalise your AI outputs or workflows)
- Check (use AI to help review your workbooks)

DISCUSSION

Food for thought...



- Where would you **not** let AI near your workbook, and why?
- What would a 'good' AI audit trail look like in your firm?

Thank you

Thank You & Questions

Get in touch



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Courses:

- Copilot Foundations
- Copilot Agents
- Excel custom skills in Copilot / Claude

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