THINK productive

Cracking Excel with AI

Stop fighting spreadsheets. Let Copilot do the heavy lifting.

The formulas, the mess, the dead time, Copilot can handle more of it than you think.

Messy exports. Broken formulas nobody wants to touch. Hours lost copying, cleaning, and double-checking numbers that should take minutes. For most people, Excel is still something to get through, not a tool that works for them. Copilot could change that, writing formulas, cleaning data, building models, catching mistakes, but most people have never been shown how to actually use it.

This workshop gets your team hands-on with what Copilot can genuinely do inside Excel, tailored to your organization's size and licence type, not just the headline features everyone's already heard about.

A fully customizable session

We recommend:

Online 3hrs Up to 20 people

What you'll learn & do

By the end of this workshop, your people will be able to:

- Use AI to write Excel formulas
- Clean messy data exports, including blank rows and merged cells
- Use Copilot for mass research, looking up key figures for 200 companies in seconds
- Build entire financial models, such as loan repayment schedules, using Copilot
- Learn to spot when AI has made a mistake or worked inefficiently

- Bypass learning VLOOKUP, PivotTables, using Copilot prompts
- Use Excel's AI tools Flash fill/formula by example to clean up text
- Turn messy data into interactive dashboards via AI
- Retrieve live & historic exchange rates
- Reuse premade prompts using Copilot Skills

94% **of participants would recommend our workshops**

Who is this workshop for?

- Anyone using Excel for 3 or more hours a week who wants a real grip on how Copilot can help them
- Beginners, intermediate users, and experts alike, everyone gets genuine value, though the benefit is naturally smaller for occasional Excel users

What this workshop offers

- **Learning by doing.** A practical, hands-on session built around the tools your people already use every day.
- **Meets you where you are.** Entry-level and relevant whether your organization is on Copilot Free or Copilot Premium.
- **Learning that lasts.** Every participant gets access to the Productivity Ninja® Academy.
- **A format that fits.** 3 hours, live online, for up to 20 people.
- **Built to stick.** Add an Impact Clinic 1 and 3 months later to keep new habits alive.

What you'll do

A hands-on, practical session working directly in Excel and Copilot, tailored to your organization's actual licence and team size. You'll leave with real take-home materials: written notes on every key point covered, video tutorials, the slides covered in class, and the completed exercise files to reference whenever you need them.

What happens when Excel stops being a time sink

When teams learn to use the tools at their disposal, everything changes:

- Messy data exports get cleaned in minutes, not hours
- Formulas get written, checked, and explained without guesswork
- Financial models get built in a fraction of the usual time
- People stop avoiding Excel tasks they used to dread
- Teams catch AI mistakes early, instead of trusting output blindly

SHELTER

"Investing in this workshop was one of the best decisions we made for our people and culture."

Sarat Kumar, CEO, Shelter

Benefits & Results

Immediate Benefits

- Practical AI skills participants can apply to their very next spreadsheet
- Faster data cleaning, formula writing, and model building
- Confidence spotting when Copilot has made a mistake or worked inefficiently
- A personal library of take-home resources to revisit anytime

What your organization gets

- Hours of manual spreadsheet work saved across the team, every week
- More consistent, reliable formulas and financial models
- A team actually using the Copilot licence you're already paying for
- Less risk from blindly trusted or entirely ignored AI output

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""I have loads of tips and ideas to try, I can't wait to access more good stuff from Think Productive.""

Kelly Gamble

Crisis

Your workshop. Your way.

We recommend a **3-hour** workshop for a team of up to **20 people**, but like all our workshops, it can also be tailored to your exact needs.

Available options:

Formats

In-person | Online

Group size

Up to 20 people | speak to us about larger groups

Duration

Standard: 3 hrs | speak to us about different durations