



Excel AI Prompt Guide

How to Get Accurate Results from Copilot and ChatGPT

AI tools like Microsoft Copilot and ChatGPT can significantly improve Excel productivity — but only if prompts are structured correctly.

Poor prompts often lead to:

- Incorrect formulas
- Missing data
- Misleading summaries
- Wrong assumptions
- Static outputs instead of formulas

Better prompts = better results.

Why AI Gets Excel Results Wrong

AI tools generate responses based on patterns and assumptions. They do not automatically validate your data.

This means AI-generated outputs may:

- Look correct while containing errors
- Use incorrect ranges
- Ignore missing rows or filters
- Misinterpret data structure
- Generate static values instead of formulas

AI produces language — not truth.

The Structure of a Good Excel AI Prompt

Every effective AI prompt should include:

1. Clear Goal

Explain exactly what you want the AI tool to do.

Weak Prompt

“Summarise this data”

Better Prompt

“Summarise total sales by region”

2. Data Context

Explain what the data represents.

Weak Prompt

“Analyse this table”

Better Prompt

“Use column B for region and column D for sales”

3. Output Format

Specify how results should be displayed.

Weak Prompt

“Show the results”

Better Prompt

“Present the results as a summary table with totals and averages”

Weak Prompt vs Strong Prompt Example

Weak Prompt

“Summarise sales”

Strong Prompt

“Summarise total monthly revenue by region using column B for region and column D for revenue, and present results in a table.”

The stronger prompt gives:

- ✓ Clear objective
 - ✓ Data references
 - ✓ Output instructions
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Common AI Prompting Mistakes

- Vague instructions
 - Missing column references
 - Assuming AI understands context
 - Not requesting output format
 - Trusting outputs without validation
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Prompting for Excel Formulas

AI tools can assist with formula creation, but formulas must always be validated.

Best Practice

- Ask for the formula AND explanation
 - Test calculations manually
 - Verify ranges carefully
 - Compare against source data
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Workplace Examples of AI Prompting

Finance Example

Weak Prompt

“Summarise revenue”

Better Prompt

“Summarise monthly revenue by region using column B for region and column D for revenue. Present results in a table showing totals and averages.”

HR Example

Weak Prompt

“Analyse staff data”

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Northdene
Durban, KZN 4093
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Better Prompt

“Calculate average salary by department using column C for department and column F for salary, and highlight the highest and lowest department averages.”

Operations Example

Weak Prompt

“Check performance trends”

Better Prompt

“Analyse delivery performance by region using column E for region and column H for delivery time. Show the three regions with the highest average delays.”

Excel AI Prompt Checklist

Before trusting AI-generated Excel outputs:

- Define the objective clearly
 - Specify data ranges or columns
 - Explain the data context
 - Request output format
 - Validate all results manually
 - Review assumptions made by AI
 - Check formulas and totals
 - Confirm ranges and filters
 - Avoid sharing confidential information
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Final Reminder


AI tools should support decision-making — not replace validation and business judgment.

Strong Excel skills still matter.


College Africa Group (CAG) provides practical corporate training in:

- Microsoft Excel
- Microsoft Copilot
- ChatGPT and AI in the Workplace
- Data validation and reporting skills

What our clients say about us

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 This guide is designed to remain POPIA-appropriate when implemented correctly.

Regards

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