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## **SMARTER SPREADSHEETS: UNLOCKING EXCEL WITH AI**

### **INTRODUCTION**

AI tools are reshaping how people work in Microsoft Excel, helping automate tasks, uncover insights, and support better decision-making. In this hands-on workshop, you'll learn how to use Excel's AI features alongside external AI-powered tools like to simplify your workflow and get more done with less effort.

This course is designed for individuals with a basic understanding of Excel who want to build on their skills. You'll explore practical, easy-to-use AI techniques that make everyday tasks faster, clearer, and more efficient.

### **TARGET AUDIENCE**

- **Excel Users:** Professionals with foundational Excel skills looking to enhance their productivity through AI integration.
- **Data Analysts, Financial Professionals:** Those aiming to automate tasks and improve data analysis techniques.
- **Educators and Trainers:** Individuals seeking to incorporate AI tools into their training or teaching workflows.
- **Busy professionals who lack advanced Excel skills but want to use AI to work faster and smarter.**
- **AI Enthusiasts:** Individuals interested in exploring the transformative potential of AI in day-to-day tasks.

### **LEARNING OUTCOMES**

**Upon completing the workshop, learners will be able to :**

1. Understand and apply built-in AI tools in Microsoft Excel such as Flash Fill, and TextJoin to streamline data manipulation tasks.
2. Explore the capabilities of AI and learn how to integrate it with Excel for advanced functionalities.
3. Develop skills in crafting and debugging formulas using AI, including creating datasets and improving existing formulas.
4. Transform and clean up data efficiently by leveraging AI for handling data from PDFs, images, and other sources.
5. Analyze complex datasets using advanced AI techniques to derive actionable insights.
6. Automate repetitive tasks such as creating macros and dashboards using AI tools.
7. Apply knowledge gained through real-world examples and practical exercises to enhance decision-making and workflow efficiency.

## WORKSHOP OUTLINE / CONTENT

### Module 1: Introduction to Generative AI

- Overview of AI and Large Language Models (LLMs)
- Key workplace applications across productivity, analysis, and content.
- Understanding capabilities, limitations, and real-world use cases

### Module 2: Ethics in Using Generative AI

- Key risks: data privacy, accuracy, bias, and misuse
- Impact of overreliance and skill degradation
- Best practices for safe, responsible AI usage

### Module 3: Leveraging AI Tools within Excel

- Introduction to Flash Fill, TextJoin, and Concat for quick data manipulation.
- Learn Power Query to extract, load, and transform data.

### Module 4: AI Add-ins, Analyze Data, Copilot, and Claude

- Overview of AI add-ins in Excel, including Claude, Analyze Data, and Copilot.
- Basic setup and access for using AI tool add-ins within Excel.
- Use cases and simple prompts to enhance everyday Excel tasks.

### Module 5: Data, Formulas, and AI

- Introduction to basic prompt engineering and its importance.
- Generating, understanding, and debugging formulas.
- Writing advanced Excel formulas with AI assistance.
- Creating tables, and building datasets with AI.

### Module 6: Cleaning Up Data and Analysis with AI

- Transforming data from PDFs, images, and external sheets into usable formats.
- Leveraging AI tools for effective and accurate data cleaning.
- Learn Paradigm's Data analysis framework to quickly gain meaningful, actionable insights from unfamiliar data

### Module 7: Automating Tasks with AI Tools & Dashboarding

- Creating macros with AI to automate repetitive processes.
- Designing interactive dashboards using AI for visualizing data.

## WHY CHOOSE THIS COURSE?

- Practical Expertise: Hands-on learning approach ensures participants can apply skills immediately.
- AI-Focused Learning: Tailored content that prioritizes essential AI integration techniques within Excel.
- Industry-Relevant Tools: Learn cutting-edge methods to stay competitive in an evolving digital landscape.
- Expert Guidance: Benefit from instructors with extensive experience and practical insights.
- Future-Proof Skills: Equip yourself with tools and techniques to boost productivity and stay ahead in a data-driven world.

## SYSTEM REQUIREMENTS

1. Participants are required to bring their own laptop for the workshop. The laptop should have Microsoft 365 installed, including Microsoft Excel. Any Microsoft Excel version released after 2009, including Excel 2010 and later versions, would be suitable for the hands-on activities.
2. Participants should also ensure that their laptop is able to connect to the internet (wifi) during the session.

