

# **Why you should **NOT** use Copilot in Excel for reporting**

*(and what to use instead)*

THE QUESTION I HEAR IN EVERY WORKSHOP

“How do I make Copilot *remember* my prompts so it runs my weekly reports automatically?”

SHORT ANSWER:

**You don't.**

That's not what Copilot is built for, and trying to force it only costs you time.

# Copilot is built for **creativity**, not consistency

Generative AI shines at open-ended, exploratory work. Think of it as a brainstorming partner, not a factory worker.

## **Great Copilot questions**

- “Which regions changed most this quarter?”
- “Find anything unusual in top sellers.”
- “Visualize sales trends over time.”

For routine reporting you don't want creativity. **You want consistency.**

# Power Query is your reporting **backbone**

Built to run the same steps the same way, every single time. It remembers every action so you can trace, audit, and refresh in one click.

- ◆ Import from files, databases, and the web
- ◆ Clean and reshape: dedupe, retype, merge tables
- ◆ Refresh the whole pipeline with one click

**Copilot**

“Help me think.”

**Power Query**

“Help me do.”

# Python in Excel for **reproducible** analysis

Once your data is structured, Python brings repeatability and precision to the work Copilot can't reliably reproduce.

- ◆ Forecasts and time-series models
- ◆ Automated calculations across large datasets
- ◆ Custom charts, simulations, and statistics

Write the cell once and it runs **identically every refresh**. Let Copilot help write the code; keep the logic in your script, not your prompt history.

# Automate and deliver with Power Automate

This is where reporting becomes a system: your insights reach people on time, every time.

- ◆ Move data between systems
- ◆ Email KPIs or post to Teams and SharePoint
- ◆ Log completion and archive for auditing

The result: **reports that run themselves.** No copy-paste, no missed steps, no human error.

THE PART TOO MANY PEOPLE MISS

# AI won't fix bad Excel habits.

Merged cells, messy headers, manual copy-paste: AI just automates the mess faster. Strong foundations come first, *then* Copilot becomes a real multiplier.

# Want your team using AI in Excel the **right** way?

I'll build a tailored Modern Excel learning plan around your real workflows: Power Query for prep, Python for analysis, Power Automate to deliver, and Copilot layered in where it adds the most value.

Get in touch → [stringfestanalytics.com/contact](https://stringfestanalytics.com/contact)

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