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At a glance:

- Format: live weekly training + system-building sessions
- Team size: ideal for analyst groups of 5-25 participants
- Delivery: online, onsite, or hybrid

What you'll get:

- Live, hands-on training
- Workbook & workflow templates
- Skills assessment (before/after)
- Real-data practice (where applicable)
- 30 days of async support
- Optional audits & custom automations

Modern Excel AI Transformation
A 4-6 week training and system-building program for analyst teams

Organizations rely on Excel for critical analysis, reporting, and operational decision-making. Yet many teams still work with ad hoc spreadsheets, inconsistent processes, and manual tasks that slow them down.

The Modern Excel AI Transformation equips your analysts with a unified, scalable workflow powered by Power Query, Python in Excel, Copilot, Office Scripts, and Power Automate. Over 4-6 weeks, your team learns to build clean, auditable, AI-ready systems—replacing one-off files with repeatable, documented processes that support accuracy, efficiency, and collaboration.

This program is designed for analyst teams that want to modernize their data work, reduce errors, and accelerate insights across the business.

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Modern Excel for modern times

- Modern Excel now spans Power Query, Python, Copilot, and automation.
- Analyst teams need systems, not one-off spreadsheets.
- This program equips your team to build clean, scalable, AI-ready workflows.

PO Box 347212
Cleveland OH 44134
440-879-8399
stringfestanalytics.com

What this program delivers

- **A repeatable Power Query data pipeline.** Build a structured, auditable preparation process that eliminates manual cleanup and ensures consistent inputs.
- **Faster analysis with Python in Excel & Copilot.** Combine Python's analytical power with Excel's flexibility and AI-assisted insights.
- **Clean, documented workflows that scale.** Apply best practices in structure, documentation, and version control for long-term maintainability.
- **Hands-on exercises using your real data.** Practice concepts on your own datasets for immediate relevance and impact.
- **Automation with Office Scripts & Power Automate.** Automate recurring tasks and create reliable workflows across Excel and Microsoft 365.
- **A modern Excel system your team can rely on.** Leave with a complete, documented, scalable workflow ready for ongoing use.

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Tools & Software Required

- Microsoft 365 with Excel for Windows
- Copilot Pro for Microsoft 365
- Power Automate (Power Apps Developer Plan)
- We will review all tech requirements with you during onboarding.

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Typical timeline (4–6 weeks)

Week 1 — Foundations & Data Intake

- Assess current workflows
- Standardize file structures
- Begin building the Power Query pipeline

Week 2 — Data Pipelines & Documentation

- Develop transformations
- Implement data quality checks
- Build shared documentation patterns

Week 3 — Python in Excel + Copilot Analysis

- Fast analysis techniques
- Visual exploration and modeling
- AI-assisted insights and summarization

Week 4 — Automation Layer

- Office Scripts fundamentals
- Automating key tasks
- Integrating Excel with Power Automate

Weeks 5–6 (Optional Extensions)

- Workflow audits
- Custom automation development
- Integration with Outlook, Teams, SharePoint, or SQL
- Advanced Python modeling

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Ideal outcomes for your organization

- Analysts spend less time cleaning data and more time interpreting it
- Workflows become auditable, consistent, and transparent
- Leadership gains confidence in the accuracy and repeatability of reports
- Teams adopt modern Excel AI practices without needing to change platforms
- Knowledge is documented, standardized, and shareable

About your instructor

- George Mount, founder of Stringfest Analytics
- Author of *Advancing into Analytics* (O'Reilly 2021) and *Modern Data Analytics in Excel* (O'Reilly, 2024)
- Awarded Microsoft's Most Valuable Professional (MVP) award for technical excellence & community contributions

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Next steps

To request a proposal or discuss tailoring the program to your organization, visit:

https://stringfestanalytics.com/contact/

Please include:

- Expected number of participants
- Online or onsite delivery preference
- Relevant datasets or workflows
- Any custom goals or challenges you'd like addressed

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