

Project, Skill, Custom Instruction, or agent workspace?

If you have started using an AI assistant for your Excel work, you have run into a menu of features nobody asked you to choose between. Each one promises to make you faster. None of them tells you when it is actually the right tool. Here is the order I work through, and the cases where the right answer is none of them.

A NOTE ON NAMES

I use Claude, where all four of these exist under the names used here: Projects, Skills, Custom Instructions, and Cowork. Other assistants have their own words for the same ideas, and some do not have all four yet.

The names will keep changing. **The jobs underneath them will not**, so it is worth learning the jobs.

The order I work through

- 1

Could I write this down once and have it run correctly forever, with no judgment calls?
If so, this is not an AI problem. It is a **Power Query** problem. Refreshable, auditable, and free. The monthly export that always arrives in the same shape does not need a prompt. It needs a refresh button.
- 2

Is this a preference I want applied every single time, no matter what I am working on?
Then it belongs in **Custom Instructions**. Lightweight and global. Formats you want consistently applied, functions to err toward, naming conventions. A few sentences, not a manual.
- 3

Do I need the same knowledge sources in front of me, time and again?
Then it belongs in a **Project**. The style guide, the data dictionary, the chart of accounts, last quarter's deck. The material that is a little too heavy to load into a Custom Instruction.
- 4

Is this a fairly deterministic process with one part I have never quite been able to code up?
Then it belongs in a **Skill**. You know the steps. You have tried to write the rule. There have just always been enough edge cases that it never quite held.
- 5

Do I need to build a whole batch of user-facing things at once?
Then you want an **agent workspace**, using your Skills as the plumbing. **Skills are the how. Cowork is the what.**

Where each one belongs

Where it goes	What it is for	What that looks like in Excel work	Sign you may have picked wrong
Power Query and its relatives: SQL, Office Scripts, VBA, Python	The rules are fixed, the source is stable, and nothing should vary between runs.	The monthly GL export. Unpivot, trim, merge to the mapping table, load. Same shape every month, and it needs to be auditable.	You are re-prompting a model each month to do a job a refresh button already did.
Custom Instructions the preferences layer	The same basic ideas you want applied to any workbook, from the moment you start.	Prefer dynamic array functions over legacy ones. Use structured references. Two decimals on currency. Never merge cells.	It has grown into an essay. What you have now is a Project or a Skill.
Projects the knowledge layer	The same knowledge sources and context, needed time and again.	A reporting project holding the style guide, the account mapping, the KPI definitions, and last quarter's deck.	You are re-uploading the same three files into a fresh chat for the fourth time this week.

Where it goes	What it is for	What that looks like in Excel work	Sign you may have picked wrong
Skills the process layer	A fairly deterministic process where some part of it always resists automation.	Cleaning vendor files where each vendor formats dates however they feel like it. Converting a workbook to a notebook. Getting specific about brand, fonts, and layout.	There are no edge cases at all, so go code it. Or there is nothing but edge cases, so just have a conversation.
Agent workspace Cowork, in the assistant I use	You need many finished, user-facing things at once, not one answer in a chat window.	Take the quarterly numbers and produce the cleaned workbook, the deck, the one-page summary, and the email, all in one run.	You wanted a single formula explained. That is a conversation, not a production job.

These are not rivals. They stack.

How the layers fit together

Custom Instructions set the floor for everything you do.

Projects supply the context a piece of work needs.

Skills carry the procedure.

The agent workspace decides what gets built and calls the Skills to build it.

One workflow, four layers deep

Custom Instruction: no merged cells, and prefer dynamic arrays.

Project: the finance style guide and the data dictionary.

Skill: how to clean and validate the vendor spend file, edge cases and all.

Cowork: "Run the vendor file, then build the summary deck and the email."

A quick check before you build any of them

Do I keep repeating the same preference? That is a Custom Instruction.

Do I keep re-uploading the same files? That is a Project.

Do I keep re-explaining the same procedure? That is a Skill. Write it down once, in plain language, the way you would brief a capable new colleague who cannot read your mind.

Do I keep assembling the same pile of deliverables by hand? That is an agent workspace.

Am I paying a model to do arithmetic that a refresh button already does? Go back to Power Query, and do not feel bad about it.

If your team is trying to get more out of Excel without sitting through another generic feature tour, that is the kind of work I do at Stringfest Analytics.

STRINGFEST ANALYTICS | George Mount | stringfestanalytics.com