STRINGFEST ANALYTICS

TEAM TRAINING & QUICK START

ChatGPT for Excel

A practical starting point for teams

Use AI to move a spreadsheet task forward, with a clear question, useful context, and a result you can check.

FOUR USEFUL PLACES TO START

Understand a workbook	Ask for an explanation of key formulas and assumptions.
Develop a formula	Describe the expected result, then test blanks and edge cases.
Prepare messy data	Agree on cleanup rules and review the records that change.
Explain an analysis	Trace each claim back to the cells and calculations behind it.

Try a prompt with a built-in check

I use Microsoft 365 Excel. My Sales table has Revenue and Cost columns. Help me calculate gross margin percentage for each row. Ask how zero revenue should be handled, explain the formula, and give me three test cases with expected results. Do not change the workbook yet.

Before you use the result

Work on a copy. Check a few rows by hand. Reconcile totals and record any assumptions. Use data your organization permits in the selected tool.

Choose the right setup

Training can focus on the ChatGPT for Excel add-in or ChatGPT alongside Excel. Confirm account access, tool permissions, and the intended activities first.

Bring one recurring Excel headache

Ask George Mount about practical training for your team. Share your task, group size, tool access, and preferred timing.

Discuss team training: stringfestanalytics.com/contact/

George Mount | Microsoft MVP | Founder, Stringfest Analytics

OpenAI setup guide | George's guide: when to use AI in Excel

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