

ADVANCED EXCEL USING COPILOT

COURSE OVERVIEW

This course offers a comprehensive and practical understanding of Excel's advanced analytical and visualization capabilities supported by Copilot. Participants will learn how to explore datasets, identify meaningful trends, and create clear visual outputs that support business decisions. The program focuses on reliable data handling, insightful analysis, and professional reporting techniques used in modern business environments. Through guided exercises and structured demonstrations, attendees will strengthen their confidence in turning raw data into well-organized insights that enhance clarity, accuracy, and overall productivity.

TARGET COMPETENCIES

- Advanced Analytical Foundations in Excel
- Structured Data Organization and Integration Methods
- Pivot-Based Insight Development with Copilot Support
- Visual Storytelling and Insight Communication
- Professional Reporting and Presentation Structures

COURSE OBJECTIVES

By completely attending this course, participants will be able to:

- Apply advanced Excel tools to explore and analyze data.
- Organize datasets for accuracy and clear interpretation.
- Build Pivot-based summaries that reveal actionable insights.
- Develop visualizations that communicate information effectively.
- Prepare structured reports supported by Copilot-generated insights.

TARGET AUDIENCE

- Reporting and data analysts
- Finance and operations professionals.
- Team leaders preparing regular reports.
- Excel users aiming to enhance productivity with Copilot.
- Business professionals handling frequent datasets.

Note

Participants must bring a Microsoft Windows laptop with Excel and Copilot installed.

COURSE METHODOLOGY

The course uses demonstrations, hands-on practice, guided scenarios, and practical discussions to build strong analytical, visualization, and reporting skills using Excel with Copilot.

COURSE OUTLINE

Advanced Analytical Foundations in Excel

- Key statistical measures and their meaning.
- Logical structures used in common business datasets.
- Lookup relationships across different data fields.
- Typical patterns found in financial or operational data.
- Copilot-supported interpretations of analytical results.

Structured Data Organization and Integration Methods

- Standard layouts for clean and consistent datasets.
- Common field formats used across business inputs.
- Basic retrieval logic for locating needed information.
- External data sources and how they align with Excel.
- Simple documentation for tracking data origins.

Pivot-Based Insight Development with Copilot Support

- Main PivotTable elements used for summarizing data.
- PivotChart components that highlight key figures.
- Slicer and filter options for interactive exploration.
- Copilot prompts that surface trends and outliers.
- Simple refinement points for clearer pivot results.

Visual Storytelling and Insight Communication

- Chart types commonly used in business reporting.
- Visual layouts that support clarity and flow.
- Color, label, and formatting choices that improve readability.
- Highlighting techniques that draw attention to insights.
- Practical guidelines for avoiding confusing visuals.

Professional Reporting and Presentation Structures

- Typical sections found in management reports.
- Layout styles suited for structured communication.
- Template elements that improve consistency.
- Summary components useful for executive audiences.
- Review points that ensure accuracy and completeness.

Virginia Institute of Finance and Management