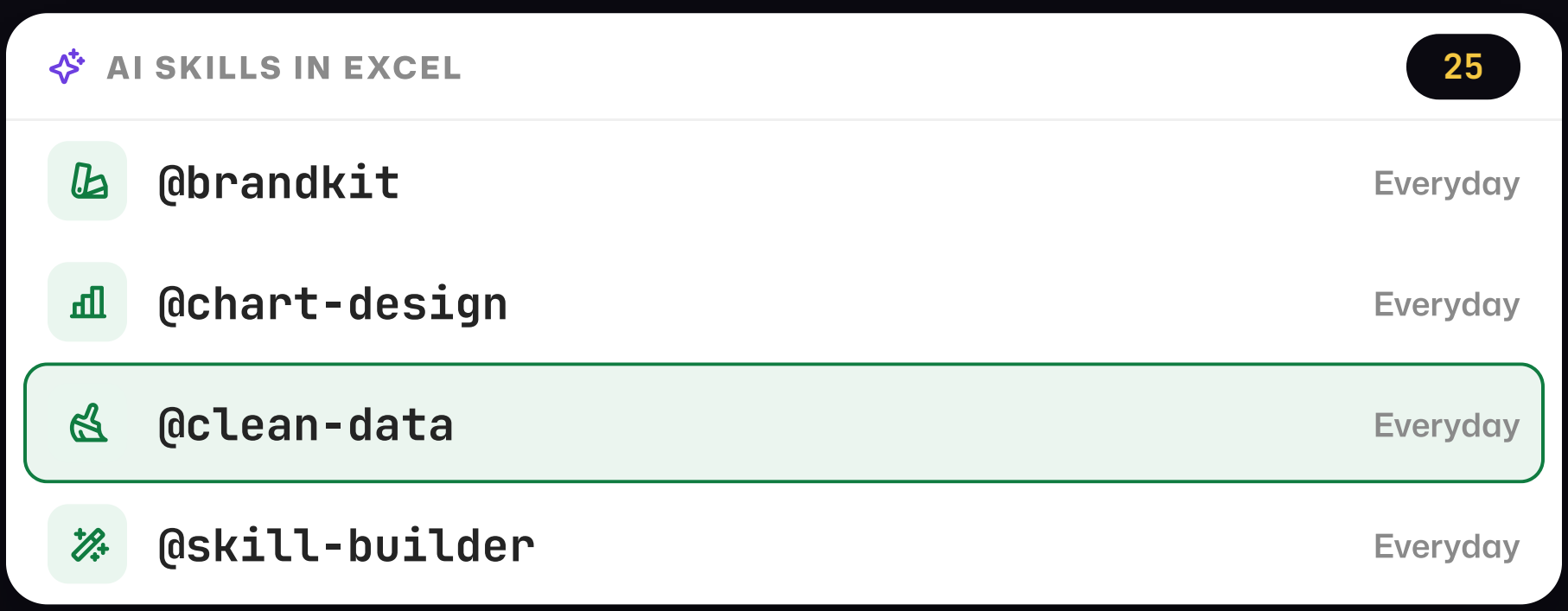
ZERO TO HERO

Excel + Copilot

Excel has 25 AI skills built in.

Type @ in Copilot and pick one. Here's every one, what it does, and the prompt to try first.



01 The everyday five

02 The finance twenty

03 Three ways in

04 Your own AI skill

Full walkthrough: Book 3, Chapter 5 in the Inner Circle. 7 days free.

ZERO TO HERO

Excel + Copilot

The everyday five, made by Microsoft.

@clean-data

Rolling out

Finds extra spaces, inconsistent formats, duplicates and wrong data types, and proposes the fixes.

```
@clean-data fix the Sales sheet
```

@chart-design

Off by default · @mention works

Creates charts or improves them: title, legend, labels and the right chart type.

```
@chart-design best chart for sales by region
```

@brandkit

Rolling out

Applies your brand colors, fonts and header styles across the workbook, and can insert your logo.

```
@brandkit apply our brand
```

@theme-design

Rolling out

Applies one Excel theme across charts, tables and cells: borders, color hierarchy, contrast.

```
@theme-design apply a clean theme to charts and tables
```

@skill-builder

Rolling out

Turns a workflow you repeat into your own AI skill, saved to OneDrive after you preview it.

```
@skill-builder turn my month-end sales review into an AI skill
```

When to use each, and when not to: Chapter 5 in the Inner Circle.

The finance twenty.

Built for models, deals and portfolios. Call any of them with @.

Models 8

@3-statements
Three statement model template

@check-model
Audits formulas, circulars, hardcodes

@comps-analysis
Comparable company analysis

@lbo-model
Leveraged buyout and returns

@merger-model
Accretion and dilution

@model-update
New results, guidance, assumptions

@returns-analysis
IRR and MOIC sensitivities

@unit-economics
Cohorts, LTV, payback

Deals 6

@buyer-list
Potential acquirers

@datapack-builder
Filings into data packs

@dd-checklist
Due diligence checklists

@dd-meeting-prep
Questions, benchmarks, risks

@deal-sourcing
Targets and founder outreach

@deal-tracker
Milestones and actions

Investing 6

@catalyst-calendar
Market events calendar

@idea-generation
Ideas into a shortlist

@portfolio-monitoring
Results vs plan

@portfolio-rebalance
Allocation drift, trades

@tax-loss-harvesting
Losses, wash-sale windows

@thesis-tracker
Evidence vs thesis

@ Try: `@check-model review this model before I send it`

Three ways in. Then make your own.

1 **@mention it**

`@clean-data` works even when the skill is turned off

2 **Pick it from Add**

`+ Add` › `Choose plugins and skills`

3 **Let Copilot decide**

`…` › `Manage plugins & skills` turn them on

OneDrive / Skills / monthly-close / SKILL.md

```
---
name: monthly-close
description: Month-end sales review.
  Clean the export, pivot by region,
  compare to budget, chart it.
---
# Monthly close
1. Run @clean-data on the export
2. Pivot by region, flag gaps over 5%
3. Chart actual vs budget
```

- **name** and **description** are required. The description tells Copilot when to use it.
- The **folder name must match the name**, or Copilot skips it.
- Added one? Select **Refresh** in Custom skills.
- AI skills need **English** as your Office display language.

Write, test and share team AI skills: **Chapter 5** in the Inner Circle.

This was the what. The book is the how.



CHAPTER 5 · EXCEL

The full Excel playbook.

- When to use each AI skill, and when not to
- Worked examples on workbooks you download and redo
- Audit a model before it leaves you, step by step
- Write, test and share your own AI skills

Start the book free fromzerotoheroes.com/books

Read it all in the Inner Circle 7 days free

Source: Microsoft Support, "Copilot in Excel built-in skills" and "Skills in Copilot in Excel" (checked October 23, 2026). Microsoft adds AI skills often; some are still rolling out.