ZERO TO HERO

Excel + Copilot

Messy sheet in. Dashboard out.

Two prompts for Copilot in Excel. The first cleans your data, the second builds a dashboard you can trust. Works on any spreadsheet.

WHAT TWO PROMPTS GIVE YOU

- Clean data: spaces, spellings, blanks, duplicates
- A list of every issue it found and fixed
- KPI cards, a trend line and ranked bars
- Slicers that filter the whole dashboard

Act as a data analyst. Before any analysis...

01 Clean first

02 Then build

03 Go deeper

04 Inner Circle

Go deeper: Book 3 in the Inner Circle. 7 days free.

Step 1. Clean first.

Open your spreadsheet, turn Edit on, open Copilot in Excel and paste this.

```
Act as a data analyst. Before any analysis, clean the data in this sheet. Check every column and fix what you find: trim leading, trailing and double spaces; make capitalization consistent in text columns; merge spelling variants of the same name or category into one value; make sure dates are real dates and numbers are real numbers; flag blank cells in key columns (highlight them, don't guess values); and remove rows that are exact duplicates. First list the issues you found and how many cells each affects, then apply the fixes and summarize what changed.
```

Why clean first

One rep spelled three ways shows up as three bars. One order counted twice inflates every total. The dashboard is only as true as the data under it.

Blanks get flagged, not guessed

Copilot highlights empty cells in key columns so you decide what goes there. Nothing is invented.

Work on a copy of the file the first time.

Step 2. Then build.

When Copilot is done cleaning, paste this. It works out your columns and dates on its own.

```
Using the cleaned data, build a polished dashboard on a new
sheet called Dashboard. First work out what the data is about:
the key measures, the categories and the date range. Then build
a bold title bar; a row of 4 to 6 KPI cards with the most
important totals and averages, each showing the change against
the previous period in a green or red strip if the data has
dates; a line chart of the main measure over time with a moving
average; sorted horizontal bar charts for the 2 most useful
categories; and 2 or 3 slicers that filter every chart and KPI.
Design: one brand colour with green and red only for up and
down, Aptos font, all caps section headers, gridlines hidden,
consistent number formats (currency for money, % for rates).
Use only numbers from the data and check the totals match the
source.
```

Check the totals

The last line makes Copilot match the dashboard to the source. Spot check one KPI yourself before you share it.

Make it yours

Swap "one brand colour" for your company colour, or ask for a different chart after it builds.

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This was the what. The book is the how.



BOOK 3 · MICROSOFT OFFICE

Copilot across your Office day.

- Where Copilot lives, app by app, and which door to use when
- Copilot Chat or Microsoft 365 Copilot: what each tier gets you
- The agents that ship with Copilot
- Full chapters on Word, Excel and PowerPoint

Start the book free fromzerotoheroes.com/books

Read it all in the Inner Circle 7 days free

Source: Microsoft Learn, Copilot in Excel (checked November 12, 2026). Features and licensing change; check what your tenant has.

Questions? Bring them to the Inner Circle live build calls. 4 / 4