

QSFExcel_ Ask Copilot Useful Questions About Your Data

Purpose: This SOP explains how to use Microsoft Copilot in Excel Desktop to analyze existing data and get useful, trustworthy answers. It focuses on asking the right questions after your data is visible and ready. This SOP assumes you already have data in Excel.

Before You Ask Anything: Can Copilot See Your Data?

Before using Copilot, quickly check your worksheet:

All data is on one sheet?	Data is in a single block (no blank rows or columns)?
The first row contains clear column headers?	The data is formatted as an Excel Table?

Quick Fix
Click anywhere in the data, then press Ctrl + T to convert it to a table.

Where the Data Came From (Important)

Copilot can help bring data into Excel from files or the web, but imported data is not automatically ready.

- Always:
- Review the imported data
 - Check headers and formatting
 - Remove extra rows or notes

Excel rules still apply, even when Copilot helps import data.

Step-by-Step: Ask Copilot Questions That Work

Step 1. Open Excel Desktop and open the workbook that contains your data.	Step 2. Click any cell inside your data table so Excel knows what data to reference.
Step 3. Click the multicolor Copilot icon in the top-right corner of Excel.	Step 4. Type a question in plain language that matches how you would ask a teammate.

Example Questions a Small Business Would Actually Ask

Summarize total sales by month.	Which products generated the most revenue?
Show a simple breakdown of expenses by category.	

Review the Answer Carefully

Copilot may return a written summary, a table, or a chart suggestion.

Check whether the results match expectations and verify important numbers. Copilot helps you think faster, not skip verification.

If the Answer Looks Wrong, Check This First

Are there blank rows or columns?	Are headers clear and specific?
Is all relevant data included in the table?	Are totals or notes mixed into the data?