

QSFExcel_Use Copilot to Prepare Data for Analysis (Without Breaking It)

Purpose: This SOP explains how to use Microsoft Copilot in Excel Desktop to safely prepare data for analysis. The focus is on light cleanup and clarification that improves analysis without overwriting, corrupting, or misrepresenting the original data.

Copilot can assist with preparation, but humans remain responsible for protecting data integrity.

What Copilot Can Help With (Safely)

Copilot is well suited for:

Identifying inconsistent labels or categories	Suggesting groupings for similar values
Highlighting obvious formatting issues	Recommending ways to make data easier to analyze

These actions should support understanding, not replace the source data.

What Copilot Should Not Do Alone

Avoid using Copilot to:

Rewrite or overwrite original values	Delete rows or columns without review
Guess missing data	Make permanent structural changes without a backup

When in doubt, protect the original data.

Step-by-Step: Prepare Data Without Breaking It

Step 1. Duplicate the worksheet or file before making changes.	Step 2. Click anywhere in the data and press Ctrl + T so Copilot can see the full dataset.
Step 3. Use prompt below in Copilot to point out issues or opportunities rather than apply fixes automatically.	Step 4. Make updates yourself so you understand and control the result.

Example CRAFT Prompt: Identify Cleanup Opportunities

[CONTEXT] We are preparing this dataset for analysis before reviewing performance. [ROLE] Business Owner. [AUDIENCE] Internal team members who rely on accurate reporting. [FORMAT] A short list of observations and recommendations. [TOPIC] Any inconsistent labels, categories, or formatting issues that could affect analysis.

Examples of Safe Preparation Actions

Standardizing category names (for example, "NY" vs "New York")	Ensuring dates use a consistent format
Separating notes from numeric data	Grouping similar items into a single category

Red Flags to Watch For

Pause and review if Copilot:

Suggests deleting data	Changes values without explanation
Produces results that don't match expectations	

- Trust the data first. Then trust the analysis.