

QSFExcel_Copilot-Generated Insights Across Teams (Excel → Word / PowerPoint)

Purpose: This SOP explains how to take insights generated with Copilot in Excel Desktop and share them clearly with others using Word or PowerPoint. The goal is to turn analysis into communication that teammates, leaders, or clients can understand and act on.

When to Use This SOP

Use this SOP when:

You want to explain Excel insights to people who don't use spreadsheets	You need a written summary or a simple presentation
You want Copilot to help translate data into plain language	You need consistency across documents and slides

Step-by-Step: Share Insights from Excel to Word

Step 1. Confirm the table, chart, or summary accurately reflects your data.	Step 2. Choose the one or two insights that matter most. Avoid sharing everything.
Step 3. Create a new or existing document where the insight will be explained.	Step 4. In Word, ask Copilot to explain the insight in clear, plain language.

Step-by-Step: Share Insights from Excel to PowerPoint

Step 1. Copy the finalized chart or summary table.	Step 2. Paste the chart into a slide and resize for clarity.
Step 3. Use prompt below to ask Copilot to generate a short headline and supporting bullets based on the data.	

Example Prompt (PowerPoint)

[CONTEXT] Create a slide title and three short bullets for a leadership update that explains what this chart shows, highlights the most important change, and suggests one action to consider next. [ROLE] Business Owner. [AUDIENCE] Senior leaders who do not work directly in Excel and need a clear takeaway. [FORMAT] One slide with a title and three concise bullets. [TOPIC] The key insight shown in this chart and its business implication.

Best Practices for Cross-Team Sharing

Share insights, not raw data	Limit each document or slide to one main point
Use simple language over technical terms	Clearly state why the insight matters

Common Mistakes to Avoid

Copying entire spreadsheets into documents	Overloading slides with numbers
Using Copilot text without reviewing accuracy	Forgetting the audience's context