



QSF-Excel: Understand Data Quickly Using Natural Language

This Quick Start Guide shows how to use Excel and Copilot to interpret small data tables, spot trends, and generate clear explanations suitable for small-business decision making.

Scenario

A small-business owner has a short Excel table—perhaps revenue, appointments, or expenses—and wants a quick understanding of patterns without digging into formulas. Copilot can explain the trends in clear language.

Step 1 — Prepare or Load a Simple Table

Open Excel and either load an existing table or create a small one. Format it as a Table (Ctrl + T or Home → Format as Table). This helps Copilot understand the structure.

Step 2 — Ask Copilot to Explain the Trends

- Open Copilot using the icon in Excel.
- Use a prompt such as: “Explain the key trends in this data. Identify increases, decreases, and any months that stand out. Use plain language.”
- Review Copilot’s explanation for clarity and accuracy.

Step 3 — Ask Follow-Up Questions for Clarity

Sample follow-ups:

- “Summarize this in one sentence.”
- “Which month shows the biggest change?”
- “Create a bullet-point summary I can share with my team.”

Follow-ups refine insights and adapt them to real-world decisions.

Step 4 — Validate the Interpretation

Check for places where Copilot may over-interpret or miss context. Seasonality, promotions, or one-time events often require human insight beyond the numbers.

Takeaways

After completing the exercise, review how accurately the tools interpreted your data, how much time was saved, and where human judgment was still required.

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