



MICROSOFT EXCEL AI FOR BUSINESS

Course ID : MSE-AI



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Duration: 2 Days

(12 Hours) 09:00 AM – 04:00 PM



Price: 12,900 THB

* (excluding VAT 7%)

* Eligible for 200% tax deduction



Training Schedule

www.9experttraining.com

Category: Artificial Intelligence, Business, Data

Excel AI with Claude & Copilot is designed for Excel users at every level who want to bring AI into their daily work. This course delivers comprehensive coverage of every AI channel available in Excel — from Microsoft Copilot and AI Add-Ins to Claude AI Add-In and Claude Cowork Mode.

Objectives

1. Understand the complete AI landscape for Excel — Copilot, Add-Ins, and Claude AI.
2. Use AI to write Excel formulas from Intermediate to Advanced level.
3. Perform Data Cleansing and Transformation using AI.
4. Build Financial Reports, Dashboards, and Pivot Analysis with AI.
5. Create Automation systems in Excel using AI (Macro, VBA, Agent Mode).
6. Apply an AI Selection Framework — know which AI tool to use in which situation.

Target Audience

1. Intermediate-to-Advanced Excel Users
2. Data Analysts, Accountants & Finance Teams
3. Managers & Team Leaders
4. IT & Digital Transformation Teams

Prerequisites

1. Basic experience with Generative AI tools such as ChatGPT, Gemini, or Copilot
2. Foundational Excel skills including VLOOKUP, IF, and PivotTable

System Requirements

1. Windows 11 / 10
2. Microsoft Excel | Microsoft 365
3. License: Claude AI Pro
4. Claude for Desktop + Claude Add-In for Excel

TOPICS TRAINING

DAY 1 - Morning Session 9:00 AM – 12:00 PM

1. AI Tools Compatible with Excel: Copilot, AI Add-Ins, Claude Add-In & Cowork
2. Comparing Capabilities, Advantages, Limitations & Cost of Each Tool

3. Setup & Configuration

- Introduction to Copilot in Excel (Demo)
- Install Claude AI Add-In
- Try Claude Cowork Mode with Excel files

4. AI Selection Framework: Choosing the Right AI for Each Scenario

- Demo: Compare outputs from the same task performed by all 4 AI tools



DAY 1 - Afternoon Session

1:00 PM – 4:00 PM

5. AI Selection Framework: Choosing the Right AI for Each Scenario

- Use AI to build VLOOKUP, INDEX-MATCH, and XLOOKUP formulas
- Create complex IF / IFS / SWITCH logic using Prompts
- Array Formulas and Dynamic Arrays: FILTER, SORT, UNIQUE

6. AI Selection Framework: Choosing the Right AI for Each Scenario

- Multi-layer Nested Functions — AI designs and explains each step
- Modern Excel Functions
- Regular Expressions: REGEXEXTRACT, REGEXMATCH

7. Financial Formula with AI

- NPV, IRR, XNPV, XIRR — investment return analysis
- PMT, PPMT, IPMT — loan and interest calculations
- Build a ready-to-use Financial Model with AI
- Workshop: Build a Financial Calculation Sheet from a real business scenario

8. Copilot vs Claude: Formula Quality Comparison & Validation

- Compare formula quality generated by Copilot vs Claude
- Learn how to validate and audit AI-generated formulas

DAY 2 - Morning Session 9:00 AM – 12:00 PM

9. Data Cleansing with AI

- Clean Thai-language data: names, addresses, phone numbers
- Handle Duplicate values, Missing Values, and Inconsistent Formats
- AI Extract: convert unstructured free-text into Structured Data

10. Power Query + AI Pipeline

- Power Query Basics: Connect, Transform, Load
- Use AI to write M Code for complex Transformations
- Build an Automated Cleansing Pipeline that refreshes on demand

11. AI Add-Ins for Text Analytics

- Sentiment Analysis: detect emotions and tone from text data
- Translation: translate content directly within Excel cells
- Entity Extraction: auto-extract names, organizations, and locations
- Workshop: Data Cleansing practice: Sales, HR, and Finance datasets

12. PivotTable & AI-Powered Insights

- Build PivotTables using AI Prompt Analysis
- Copilot Analyze Data feature
- Grouping, Calculated Fields, and Slicers

13. Chart & Dashboard

- Copilot auto-generates the most appropriate chart type for your data
- Claude Cowork builds Interactive Dashboards (HTML / Chart.js)
- Best practices for selecting the right chart type
- Workshop: Build an Executive Dashboard from real sales data

DAY 2 - Afternoon Session 1:00 PM – 4:00 PM

14. Excel Agent Mode (Demo)

- Understand Agent Mode: AI executes multi-step tasks continuously
- Real-world examples: format data, create charts, and summarize reports in a single command

15. Claude Cowork Skills for Automation

- Use Cowork to work directly with Excel files
- Financial Skills: auto-generate Financial Reports
- Corp Identity Skills: auto-apply templates and branding
- Invoice Processing: read invoices and summarize data into Excel
- Workshop: Build an Automated Monthly Report system

16. AI-Powered Workflow Design

- Design workflows that combine multiple AI tools into one pipeline
- Connect Excel with Claude Cowork and Power Query as an end-to-end pipeline
- Prompt Engineering strategies for Excel-specific use cases



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