

AUTOMATE **Intermediate** 20 MIN · UPDATED 2026-10-01

Build a reusable Excel Skill for a repeated Copilot task.

Turn a task you ask Copilot to do the same way every time into a reusable Excel Skill instead of retyping the same prompt.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

A repeated analysis or formatting task reduced to one click, consistently applied by everyone using the workbook.

Workflow Steps

Step 1: Identify a task with the same steps every time

Excel

A monthly reconciliation format, a recurring pivot structure, a specific cleanup routine — pick something genuinely repetitive, not a one-off.

Step 2: Define the Skill from your standard process

Copilot in Excel

Open Copilot's skill builder and paste in the exact multi-step prompt you'd normally type out by hand, then give it a specific, searchable name ("Monthly Recon Format," not "skill1") so you and teammates can find it again next cycle instead of recreating it.

Step 3: Run it on a new month's data to confirm it generalizes

Excel

Run the Skill against next month's actual data, not the same file you built it against — if a column shifted position or a new row type appeared and the Skill breaks or misfires, that's exactly the fragility you want to catch now rather than during a live close.

Step 4: Share it with whoever else does this task

Excel

If teammates do the same recurring task, give them the Skill so everyone's output is consistent rather than each person's personal variant.

✓ Check the work

- The Skill produces correct results on data it wasn't originally built against.
- Output matches what manually following the original process would have produced.
- Teammates doing the same task are using the shared Skill, not personal workarounds.

Expected Outcome

A saved, reusable Skill that reliably repeats a specific Copilot task on demand.

Want help rolling this out across your team? **Go to Liminals.Tech** ■