

AUTOMATE **Beginner** 15 MIN · UPDATED 2026-10-01

Have Copilot plan a complex Excel change before it touches your sheet.

Use Copilot's plan-first mode to review a proposed multi-step change before it edits anything, instead of discovering the damage after the fact.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

Fewer reworked workbooks from an AI edit that technically did what was asked but not what was meant.

Workflow Steps

Step 1: Describe the full change you want

Excel

Write the prompt as the finished state you're after — "restructure this into a monthly summary with a variance column comparing actual to budget" — rather than the first mechanical step. Describing only "add a column" leaves Copilot guessing at the bigger structural change you actually have in mind.

Step 2: Ask Copilot to plan before making changes

Copilot in Excel

Use the plan-first option so Copilot outlines its approach as a numbered list before touching the workbook, rather than executing immediately.

Step 3: Review and adjust the plan

Excel

Check each planned step against what you actually meant — this is the cheap point to catch a misunderstanding, before any formula or layout has changed.

Step 4: Approve and let it execute

Copilot in Excel

Once the plan matches your intent, let Copilot carry it out, then spot-check the result against the plan you approved.

✓ Check the work

- The executed changes match the approved plan, not an improvised variation.
- Formulas in untouched areas of the sheet still calculate correctly.
- Anything the plan flagged as uncertain was resolved before execution, not after.

Expected Outcome

A reviewed, approved step-by-step plan executed exactly as shown, with no surprise edits.

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