

ANALYZE

Beginner

10 MIN

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Query a dataset in plain language instead of building a pivot table.

Ask Excel's Copilot chat pane a direct question instead of building a pivot table for a one-off answer.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

Faster answers to one-off data questions without building throwaway pivot tables.

Workflow Steps

Step 1: Open the Copilot chat pane on your dataset

Excel

If the data is still a plain range, convert it to a Table first (Ctrl+T) — Copilot reliably identifies column names and boundaries from a Table, while a loose range forces it to guess where the data actually starts and ends, which is a common source of a wrong or incomplete answer in step 2.

Step 2: Ask the question directly

Copilot in Excel

Skip the pivot-table setup for a question you only need answered once.

PROMPT

Which salesperson had the most Q3 sales, and what was their total? Also tell me the second and third highest.

Step 3: Verify before you repeat the number out loud

Excel

A quick chat answer is convenient, but it's still worth a second glance before you quote it in a meeting.

Step 4: Build the real pivot table if it's a recurring question

Excel

If you find yourself asking the same question every month, that's a signal to build a proper pivot table or dashboard instead of re-asking each time.

✓ Check the work

- Cross-check the answer against a quick SUM or COUNTIF formula before repeating it externally.
- Confirm Copilot used the full dataset, not a filtered or truncated view.
- If the question recurs, build a real pivot table instead of relying on chat every time.

Expected Outcome

A direct answer to a specific data question, with the option to turn it into a real pivot table if you need it again.

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