Session 4 Handout: Spreadsheets and the Playbook

FAST-04 AI Productivity with Microsoft Copilot and Google Gemini · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

Asking a spreadsheet a question in plain English is powerful, and the answer is only as good as the data the assistant sees. A leftover filter can flip "which region dropped most." This session adds a manual check, shows why over-shared files become everyone's files once an assistant is involved, and pulls the course into a personal playbook with honest time measures.

Key concepts

1. Plain-language spreadsheet questions

Copilot in Excel and Gemini in Sheets can answer questions ("which region dropped the most last quarter?"), add formula columns, build pivots, and highlight patterns. Good habits:

- **Clean table:** one header row, consistent data types, no merged cells, no totals mixed in the data. (Excel: format as a Table.)
- **Ask to see the formula or pivot** the answer is based on.
- **Keep the original untouched**; work on a copy or have the assistant add new columns or sheets.

Feature details change frequently (some 2026 Excel features changed status mid-year). Confirm what your version supports.

2. Verify one answer by hand

Rebuild the answer with a pivot or formula (SUMIFS, a pivot of Region × sum). Compare. **If they differ, stop and investigate:**

Cause	Example
Hidden filter	Only LTL rows visible
Blanks	Empty cells treated as zero
Duplicates	A customer's rows pasted twice
Different method	Dollars vs percentage; wrong date range

Log what you checked and what you found.

3. Over-sharing: what the assistant can see

If a file is shared with "everyone" (Microsoft: a site open to "Everyone except external users"; Google: general access set to your whole organization), **everyone's assistant can surface it** when they ask a related question. Over-sharing that used to be obscure becomes easy to find.

What to do: check sharing on sensitive files you own; restrict to the right group; tell the owner if it's not yours; report anything that looks like an exposure. Don't download or screenshot sensitive content "to check." IT can use admin tools (Microsoft's data-access governance and Purview, Google's Drive sharing controls) to find over-sharing at scale.

4. The productivity playbook

Five recurring tasks. For each: **steps, prompt, check, and time saved after checking.** Demonstrate two live.

Honest time = time by hand − (AI run time + checking and fixing time). If the saving disappears, adjust or stop. That's a valid result.

Worked example: which region dropped most?

Region	Q2 total	Q3 total	Change	%
Merrimack Valley	69,600	68,000	−1,600	−2.3%
North Shore	55,400	50,400	−5,000	−9.0%
Metro West	56,200	49,700	**−6,500**	**−11.6%**
Southern NH	32,100	32,500	+400	+1.2%

The assistant answered **North Shore (−$6,300)**. A filter on Service = LTL was still on. Cleared filters and a pivot show **Metro West**, driven by FTL (41,000 → 33,700). The tool answered the data it was shown; the sheet was the problem.

Checklist: spreadsheet and sharing

- ☐ Data in a clean, labeled table; filters cleared.
- ☐ Formula or pivot shown for each answer.
- ☐ One answer rebuilt manually; differences explained.
- ☐ Original data untouched.
- ☐ My sensitive files' sharing checked; over-shares fixed or reported.
- ☐ Playbook: five tasks, steps, prompt, check, honest time.

Do and don't

Do	Don't
Clear filters before asking	Ask with leftover filters or hidden rows
Rebuild one answer yourself	Paste the AI's number straight into a report
Restrict sensitive files to a named group	Use org-wide links for HR or pricing files
Tell owners and report exposures	Download sensitive files to "check" them
Record checking time	Report only the AI's run time

Try this at work

1. Ask three questions of a non-sensitive work sheet; verify one manually.
2. Open "Shared" in OneDrive or Drive and review files you've shared widely.
3. Finish your playbook and time two tasks this week.

Glossary

Term	Meaning
Pivot table	Summary table grouping and totaling data
SUMIFS	Formula summing values that meet conditions
Hidden filter	An active filter that hides rows from view and some calculations
Over-sharing	A file accessible to far more people than need it
Productivity playbook	Your documented AI-assisted tasks with checks and time
FTL / LTL	Full truckload / less-than-truckload freight

Key takeaways

- Plain-language questions still need a manual check.
- Fix over-shared files; the assistant sees them too.
- Playbook: five tasks with steps, prompt, check, honest time.