



PROMPT WO-043

Build a Pivot Table

Purpose

Use this prompt to create a well-structured Pivot Table that summarises large datasets, identifies trends, and answers key business questions. It recommends the best row, column, filter, and value fields while explaining how to interpret the results.

DIFFICULTY **Intermediate****TIME SAVED** **20–45 min****BEST FOR****Data Analysis** **Best AI Tools**

- ChatGPT
- Claude
- Microsoft Copilot
- Google Gemini

 Copy & Paste Prompt

You are an expert Microsoft Excel Data Analyst.

Create the best Pivot Table using the information below.

Spreadsheet Purpose:

[Describe the spreadsheet]

Columns Available:

[List all column headings]

Business Question:

[What do you want to learn from the data?]

Data Volume:

[Approximate number of rows]

Preferred Output:



[Summary, comparison, trend analysis, KPI dashboard, etc.]

Excel Version:

[Microsoft 365, Excel 2021, Google Sheets, etc.]

Please:

- Recommend the most appropriate Pivot Table layout.
- Specify which fields should be placed in:
 - Rows
 - Columns
 - Values
 - Filters
- Recommend any calculated fields if useful.
- Explain what the Pivot Table will reveal.
- Suggest additional Pivot Charts if appropriate.
- Highlight any common mistakes to avoid.
- Present the guidance clearly and professionally.

Return only the completed Pivot Table recommendation.



Example

INPUT

Spreadsheet Purpose: Monthly sales transactions.

Columns: Date, Region, Salesperson, Product, Quantity, Sales Value.

Business Question: Which region generated the highest sales each month?

EXPECTED OUTPUT

Pivot Table Recommendation

Layout

Rows

- Month

Columns

- Region

Values

- Sum of Sales Value

Filters

- Product
- Salesperson



What This Shows

This Pivot Table displays monthly sales totals by region, making it easy to compare regional performance and identify seasonal trends.

Recommended Pivot Chart

Clustered Column Chart

This chart provides a clear visual comparison of regional sales across each month.

Optional Calculated Fields

- Average Sale Value
- Sales per Transaction
- Percentage of Total Sales

Common Mistakes to Avoid

- Including blank rows in the dataset.
- Forgetting to refresh the Pivot Table after updating the data.
- Using inconsistent date formats.
- Summarising text fields instead of numeric values.

Recommendation

Use slicers for Region, Product, and Salesperson to make the Pivot Table interactive and easier for managers to explore.

 **Builder's Tip:** *Pivot Tables are one of Excel's most powerful features because they let you summarise thousands of rows of data in seconds. Combine them with slicers and Pivot Charts to create interactive reports that anyone can use.*

Related Prompts

- WO-041 – Analyse Spreadsheet Data
- WO-042 – Create an Excel Formula
- WO-044 – Design a Dashboard
- WO-046 – Create Charts and Graphs

Tags

PIVOT TABLE

EXCEL

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