

**PROMPT WO-049**

Automate Spreadsheet Tasks

Purpose

Use this prompt to identify repetitive spreadsheet tasks and recommend practical automation solutions using Excel features, Power Query, Power Automate, Google Sheets, or VBA where appropriate. It helps save time, reduce manual errors, and improve productivity.

DIFFICULTY **Intermediate****TIME SAVED** **30–90 min****BEST FOR****Automation**

Best AI Tools

- ChatGPT
- Claude
- Microsoft Copilot
- Google Gemini



Copy & Paste Prompt

You are an experienced Spreadsheet Automation Consultant.

Recommend the best way to automate the spreadsheet task described below.

Software:

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

Current Process:

[Describe the manual process]

Frequency:

[Daily, Weekly, Monthly, etc.]

Dataset Size:

[Approximate number of rows]

Current Challenges:



[List any problems]

Desired Outcome:

[Describe the automation goal]

Technical Skill Level:

[Beginner, Intermediate or Advanced]

Please:

- Analyse the current process.
- Identify repetitive tasks suitable for automation.
- Recommend the simplest and most reliable automation method.
- Explain the implementation steps clearly.
- Recommend any formulas, Power Query, Power Automate, VBA, Office Scripts, or Google Apps Script if appropriate.
- Estimate the potential time savings.
- Highlight any risks or limitations.
- Suggest additional improvements to make the process more efficient.

Return only the completed automation recommendation.



Example

INPUT

Software: Microsoft Excel

Current Process: Every Monday I import a sales report, remove duplicate rows, format the dates, calculate totals, and create a Pivot Table.

Frequency: Weekly

Skill Level: Beginner

EXPECTED OUTPUT

Spreadsheet Automation Report

Process Review

The current reporting process involves several repetitive manual steps that are well suited to automation.

Recommended Automation

Primary Recommendation: Use Power Query to:

- Import the report automatically.
- Remove duplicate records.



- Standardise date formats.
- Clean column names.
- Load the cleaned data into Excel.

Then:

- Refresh an existing Pivot Table.
- Update connected charts automatically.

Alternative Solution

If using Google Sheets:

- Use Apps Script to automate the import and formatting.
- Schedule automatic refreshes where possible.

Estimated Time Savings — see table below

CURRENT TIME	AUTOMATED TIME	TIME SAVED
45 minutes	5 minutes	40 minutes per week

RISKS

- Source file structure must remain consistent.
- Automation should be tested before replacing the manual process.
- Back up the workbook before implementing major changes.

ADDITIONAL RECOMMENDATIONS

- Create a dashboard linked to the refreshed Pivot Table.
- Add validation rules to reduce data entry errors.
- Document the automation process for other team members.

 **Builder's Tip:** *If you find yourself repeating the same spreadsheet task every week, it's usually a candidate for automation. Even saving 10 minutes each day adds up to more than 40 hours over a working year.*

Related Prompts

- WO-042 – Create an Excel Formula
- WO-043 – Build a Pivot Table
- WO-044 – Design a Professional Dashboard
- WO-050 – Audit an Excel Workbook



 Tags

AUTOMATION

EXCEL

POWER QUERY

**POWER
AUTOMATE**

**PROCESS
IMPROV**