



PROMPT WO-050

Audit an Excel Workbook

Purpose

Use this prompt to perform a comprehensive audit of an Excel workbook. It helps identify formula errors, broken links, inconsistent formatting, inefficient calculations, data quality issues, and opportunities to improve performance, usability, and accuracy.

DIFFICULTY **Intermediate****TIME SAVED** **45–90 min****BEST FOR****Workbook Audits**

Best AI Tools

- ChatGPT
- Claude
- Microsoft Copilot
- Google Gemini

Copy & Paste Prompt

You are an experienced Microsoft Excel Auditor.

Perform a comprehensive audit of the Excel workbook using the information below.

Workbook Purpose:

[Describe what the workbook is used for]

Number of Worksheets:

[Insert number]

Key Functions Used:

[List formulas, Pivot Tables, Power Query, VBA, etc.]

Known Issues:

[List any known problems or leave blank]

Primary Users:



[Who uses the workbook?]

Business Importance:

[Low, Medium or High]

Please:

- Review the workbook structure.
- Identify formula errors or inconsistencies.
- Highlight broken references, external links or named ranges.
- Review formatting consistency.
- Assess data quality and validation rules.
- Identify duplicated calculations or unnecessary complexity.
- Recommend improvements to performance and usability.
- Highlight any risks that could affect reporting accuracy.
- Prioritise recommendations by business impact.
- Finish with an executive summary and overall workbook health rating.

Return only the completed workbook audit report.



Example

INPUT

Workbook Purpose: Monthly financial reporting.

Worksheets: 8

Key Functions: SUMIFS, XLOOKUP, Pivot Tables, Power Query

Business Importance: High

EXPECTED OUTPUT

Excel Workbook Audit Report

Executive Summary

The workbook is well structured and supports monthly financial reporting effectively. Several opportunities exist to improve reliability, maintainability, and performance.

Structure Review

✅ Logical worksheet organisation.

⚠️ Two hidden worksheets should be documented.

Formula Review



- Three inconsistent formulas identified.
- One hard-coded value found inside a formula.
- Several formulas could be simplified using structured references.

External Links

- One broken external workbook link detected.
- Recommendation: Remove or update the reference.

Data Validation

- Validation applied to most input cells.
- Two data entry areas have no validation rules.

Formatting

- Minor inconsistencies in fonts and number formatting.
- Conditional formatting duplicated across multiple sheets.

Performance

Recommendations:

- Reduce volatile formulas.
- Replace repeated calculations with helper columns where appropriate.
- Optimise Pivot Table refresh settings.

Priority Actions — see table below

PRIORITY	RECOMMENDATION	IMPACT
High	Fix broken workbook links	Prevent reporting errors
High	Correct inconsistent formulas	Improve accuracy
Medium	Standardise formatting	Improve usability
Low	Remove unused named ranges	Simplify maintenance

WORKBOOK HEALTH RATING

● Good

The workbook is suitable for continued business use after the recommended improvements have been completed.

 **Builder's Tip:** *Spreadsheets often evolve over months or years, making them more complex than intended. A regular workbook audit helps identify hidden risks before they become costly mistakes and keeps your reporting reliable as your business grows.*



Related Prompts

- WO-041 – Analyse Spreadsheet Data
- WO-043 – Build a Pivot Table
- WO-044 – Design a Professional Dashboard
- WO-049 – Automate Spreadsheet Tasks

Tags

EXCEL AUDIT

SPREADSHEET
REVIEW

DATA QUALITY

BUSINESS
REPORTING

MS EXCEL