

Claude + Excel: Workflows You *Already Need*

Claude as an extension inside the tool you already run your business on — dashboards, deduplication, cleanup, and reports. No new software. No learning curve. Just the prompts.

01

Dashboards

Turn a raw export into a one-page summary in minutes.

02

Deduplication

Find and merge duplicate records before they cost you a bad send.

03

Cleanup & Formatting

Standardize messy data without touching a single formula.

04

Reports

Turn numbers into a summary a non-technical stakeholder can actually read.

GETTING CLAUDE INTO EXCEL

Two ways to run these: **Claude for Excel**, Anthropic's official add-in (currently in beta), lets you run prompts directly inside a workbook. If you don't have access yet, export the sheet or range you're working with as a CSV, paste it into Claude.ai or Claude Desktop, run the prompt, then paste the result back into your sheet. Either way works — the prompts below are what actually matter.

Always paste a small sample first (20–30 rows) to check Claude's output before running it on a full sheet.

01 · DASHBOARDS

Summary Dashboard

Use: weekly or monthly reporting without building a pivot table by hand.

PROMPT

Here's my [sales / expense / signup] data from Excel. Build me a one-page summary: total by month, top 5 by [category], and any trend worth flagging. Format it as a table I can paste back into a new sheet.

KPI Snapshot

Use: an exec-ready snapshot in minutes instead of a rebuilt slide deck.

PROMPT

From this data, pull the 5 numbers that matter most for a [owner / ops lead] to see at a glance. Label each one with what changed versus last period, and say in one line why it matters.

02 · DEDUPLICATION

Find Duplicates

Use: cleaning a CRM or contact export before a campaign send.

PROMPT

Here's a contact list. Find likely duplicates — same person with slightly different spelling, email, or formatting. List each pair and tell me which record looks more complete.

Merge Records

Use: after the find-duplicates pass, to produce one clean list.

PROMPT

For these duplicate pairs, merge into one clean record — keep the most complete name, phone, and email from each pair. Output as a table ready to paste back into Excel.

03 · CLEANUP & FORMATTING**Standardize Formatting**

Use: prepping a messy export before it gets used somewhere else.

PROMPT

Clean this column: fix inconsistent date formats, capitalize names properly, and standardize phone numbers to (XXX) XXX-XXXX. Return the corrected column in the same row order – don't change anything else.

Flag Errors

Use: a QA pass before sending data downstream to a client or teammate.

PROMPT

Scan this data for anything that looks wrong – missing values, obvious typos, numbers out of a realistic range. List the row and what's off. Don't fix anything yet, just flag it.

04 · REPORTS**Turn Data Into a Report**

Use: replacing the "write the monthly report" task on your to-do list.

PROMPT

Here's this month's numbers. Write a 3-paragraph plain-English summary a non-technical stakeholder could read in 30 seconds – what happened, why it matters, and what to watch next month.

Compare Periods

Use: fast variance analysis without a manual side-by-side.

PROMPT

Compare this month's data to last month's. Call out anything that changed by more than 10%, and give one likely reason for each change based on the data.

ONE MORE THING

These prompts are starting points, not scripts — swap the bracketed parts for your actual business, and steer Claude the same way you'd steer a smart new hire: give it context, check its work, and get specific when the first answer isn't quite right.

Want this built into your business as a running system instead of a manual copy-paste? That's the AI Implementation Mapping Session — details at upgradewithai.co/work-with-me.html.