



Special Edition



Agentic AI for Finance & Analytics Teams



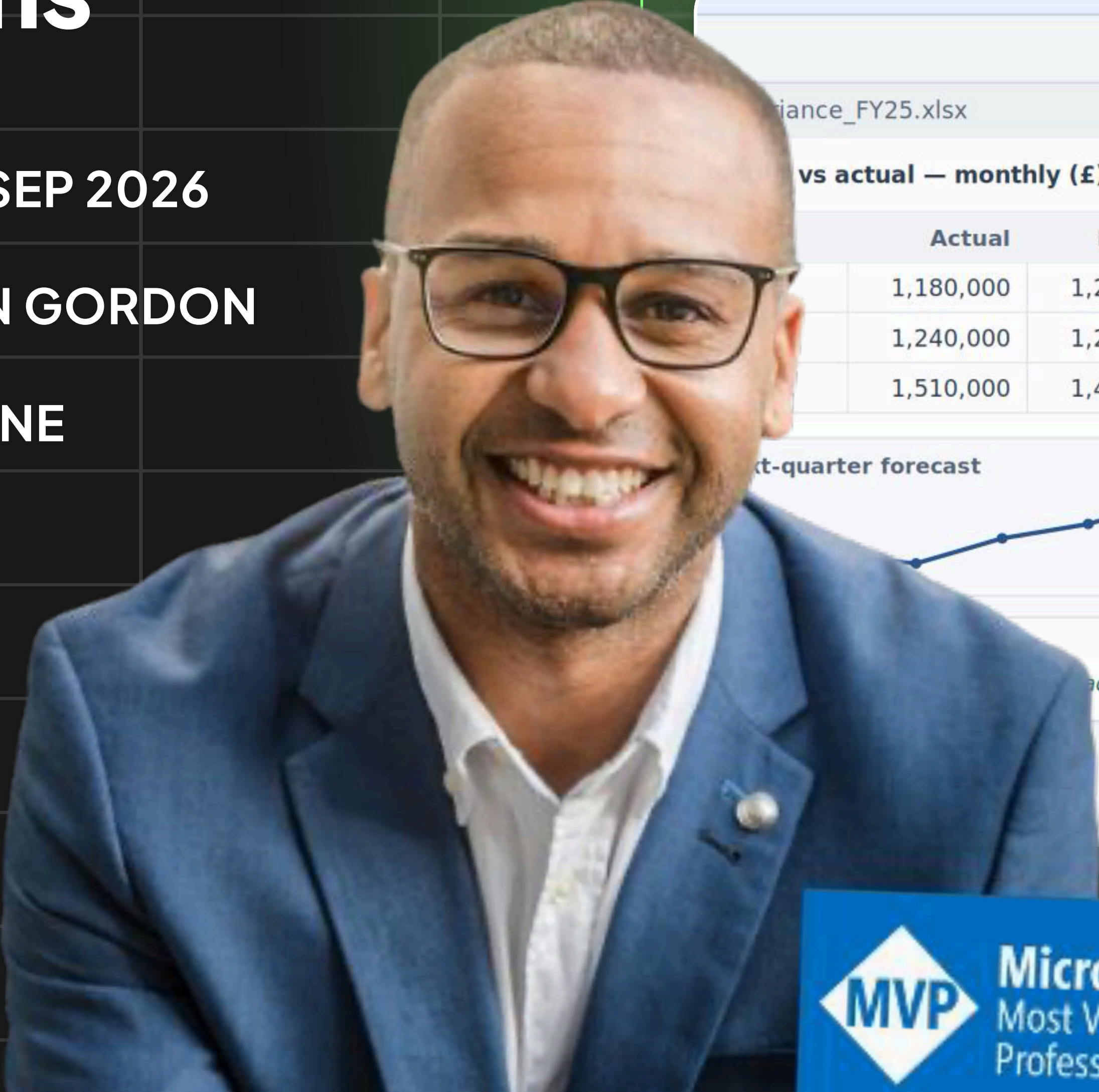
8-9 SEP 2026



LEON GORDON



ONLINE



Microsoft®
Most Valuable
Professional



Prompt: "Clean this up, bu



UK_actuals_export.xlsx

Management Accounts — UK (DRAFT)

Generated 14/06/2026 09:41

Account	Jul-25
Product Revenue	£312,450
Services Revenue	96,200
Cost of Goods Sold	£142,000
Salaries and Wages	121,000
marketing	£47,200

ariance_FY25.xlsx

vs actual — monthly (£)

	Actual	Budget	
	1,180,000	1,205,000	▼
	1,240,000	1,210,000	▲
	1,510,000	1,430,000	▲

xt-quarter forecast



ady

Hosted by
Global
Excel
Summit

Crafted by
DATEL

Brand Partner
Sheetcast

Table of contents



Course outline	03
Who is this course for?	04
Course contents	05
Why choose this course?	07
About your trainer	08
Course pricing	09
Contact details	10

Course outline

Overview

AI agents are about to reshape how finance and analytics work gets done. The only question is whether you lead that shift or scramble to catch up. Agentic AI has moved from slideware to something teams can genuinely use, but the gap between a polished demo and a workflow you'd trust at month-end is where most teams get stuck.

This hands-on 6-hour online masterclass cuts through the hype and shows what Microsoft has actually shipped for finance and analytics work – Copilot in Excel, the Microsoft 365 Finance agent, Fabric data agents over your governed data, and custom agents built in Copilot Studio.

You'll see these applied to real scenarios like variance analysis, commentary, forecasting and reconciliations.

You'll see where agents save real hours, where they can't yet be trusted, and how to deploy them safely with the accuracy, auditability and governance finance demands. You'll leave with a clear-eyed view of the 2026 toolset and a 90-day plan to put one agent to work on your own team.

Learning outcomes

- ✓ What "agentic" actually means, the spectrum from assisted to autonomous, and how to tell production-ready capability from hype
- ✓ How to drive Copilot in Excel (edit, plan and chat modes) to build models, analyses and forecasts from plain English and where its hard limits are
- ✓ How the Microsoft 365 Finance agent and Fabric data agents extend AI from a single workbook to your governed enterprise data
- ✓ How to build and automate your own finance/analytics agent in Copilot Studio, including a real month-end workflow
- ✓ How to handle the parts that actually matter in finance, accuracy, auditability, human-in-the-loop, governance and cost

Who is this course for?

This training is suitable for individual contributors through to finance and analytics team leads weighing up where agents fit. Typical attendees include:



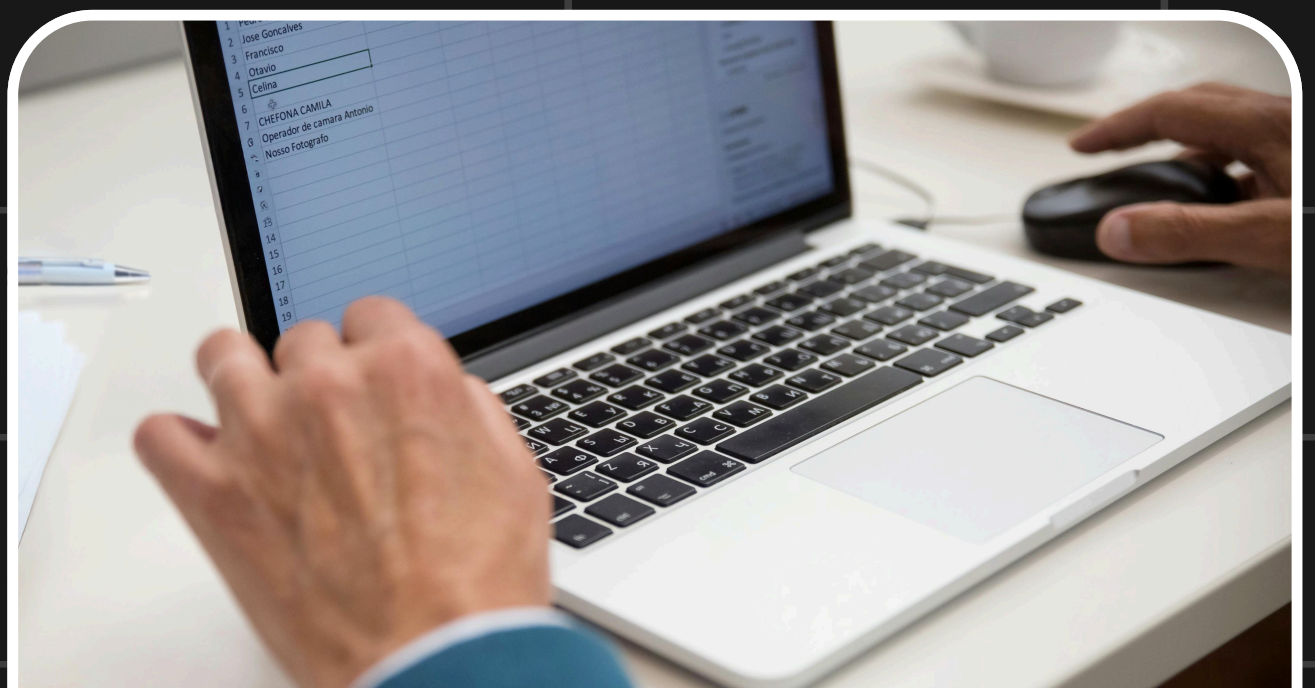
Finance Teams – FP&A analysts, controllers, accountants, finance business partners, finance managers/team leads



Analytics Teams – Data analysts, business analysts, reporting analysts, data scientists.



BI Teams – BI developers/ engineers, Power BI specialists, BI managers, data platform owners, reporting & dashboard leads.



Excel users who are confident in Excel and want to move from "I've heard about AI agents" to "I can use them, safely, on real work."

Course contents

Part 1: THE AGENT ON YOUR DESK

Module 1: What "agentic" actually means (and what's just hype)

- The spectrum: assisted, then automated, then agent, goal-driven, tool-using, self-checking
- Where the 2026 Microsoft stack really sits: Copilot, the Finance agent, Copilot Studio, Fabric data agents, Cowork
- An honest map of what's production-ready versus preview versus marketing
- The core misconception: an agent is not a chatbot, and autonomy is a dial, not a switch

Module 2: Copilot in Excel as your first agent (hands-on)

- Editing with Copilot, edit, plan and chat modes, and choosing your model
- Live build: messy finance data into a clean model, then variance analysis, a forecast (with Python in Excel) and a chart, all from natural language
- Using plan mode for reviewable, multi-step work
- A deliberate, teachable error and how to catch what the agent gets wrong
- The hard limits: current workbook only, no access to enterprise data, direct edits

Module 3: The Microsoft 365 Finance agent (demo and discussion)

- The role-based finance experience: Finance Home, Finance Chat and conversational access to ERP data
- Working in context across Excel, Outlook and Teams while protecting ERP integrity
- Practical plays: variance commentary, reconciliation assist, close acceleration
- Where it fits versus general-purpose Copilot

Module 4: The trust problem – accuracy, audit and human-in-the-loop

- Why finance is the hardest case: a confidently wrong number is worse than none
- Grounding, sources and citations, and spotting hallucination patterns
- Designing review gates, and deciding what an agent may never finalise alone
- Exercise: find the errors in an AI-built model
- Recap and key takeaways

Course contents

2 AUTOMATED

3 AGENTIC

You drive. The AI suggests, drafts and explains — on demand.

IN FINANCE

Copilot drafts a SUMIFS, summarises a variance, or writes first-pass commentary — when you ask.

Pre-set steps run on their own, the same way every time.

IN FINANCE

A scheduled flow refreshes the data and emails the month-end pack — rules, not reasoning.

Goal-driven. It plans, uses tools, and checks its own work.

IN FINANCE

Give it a goal and it pulls actuals vs budget, drafts the commentary, and routes it for sign-off.

PART 2: THE AGENT ACROSS YOUR DATA AND WORKFLOWS

Module 5: Beyond a single workbook, agents over governed data with Fabric (demo)

- Why enterprise questions need more than an Excel-bound agent
- OneLake and Fabric data agents: natural-language answers over your Lakehouse, Warehouse and semantic models
- How an Excel and Power BI audience plugs in, via semantic models, no code required
- Demo: questioning a governed finance dataset, with grounding and data lineage

Module 6: Building your own agent in Copilot Studio (guided build)

- Creating an agent in plain language, grounding it in your data, and giving it actions
- Agent flows and workflows: automating a real month-end variance pack, pull data, analyse, draft commentary, route for approval
- Connectors, MCP and multi-agent orchestration at a glance
- When a deterministic flow beats generative reasoning, and when it doesn't

Module 7: Governance, cost and risk – making it real

- The credit-and-metering reality, why autonomous agents cost more, and why CFOs watch AI spend
- Security and compliance boundaries, data residency and model choice
- Avoiding agent sprawl: who builds, how you monitor, how you evaluate quality
- A practical governance checklist to take away

Module 8: Your agent adoption playbook (planning and wrap)

- Choosing the right first use case: high value, low risk, measurable
- Pilot, measure, scale and change management for finance teams
- Build your own first-agent canvas
- Recap, resources and Q&A

Why choose this course?

What's included

- ✓ 6 hours online training with Leon Gordon, 5X Microsoft MVP
- ✓ All downloadable presentation and working files
- ✓ 5 hours of CPD (Continuing Professional Development) hours / points
- ✓ Certificate of attendance
- ✓ Access from anywhere, any time
- ✓ 100% money-back guarantee



About your trainer



Leon Gordon

5x Microsoft MVP, CEO of Onyx



Leon Gordon is a Microsoft Data Platform MVP and the founder of Onyx Data. He specialises in the Microsoft Data Platform, Microsoft Fabric, Foundry, Power BI and Azure SQL and works at the intersection of data analytics and agentic AI for global enterprise and finance teams.



Leon designs and delivers engaging, hands-on masterclasses, in person and online, that turn the platform's fast-moving capabilities into skills people can use the next day. His focus is practical and outcomes-driven, not features for their own sake, but what actually works in production.



Course pricing

£195

Early bird price
ends 31 Jul 2026

£299

Regular price
1 Aug - 7 Sep 2026

£585

Save additional 15%

Team of 3 discount

Pay by invoice

To pay by invoice, please contact Tea Kuseva at tea@globalexcelsummit.com.

We will send you an invoice which you can submit to your accounts payable system.

Global Excel Summit

Phone

+ 44(0) 744 744 6470 (Tea Kuseva)

E-mail

info@globalexcelsummit.com

Mailing Address

95 Wilton Road, London SW1V 1BZ, UK

Website

www.globalexcelsummit.com