Building a Marketing Funnel with Excel & Copilot

From messy raw data to actionable funnel insights — in one session

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What You Need to Follow Along

REQUIRED

1 **Microsoft 365 subscription**

Excel desktop app (Windows or Mac) with Copilot enabled.
Personal / Family / Business / Enterprise — all work.

No subscription yet? Free 30-day trial at microsoft365.com/try

REQUIRED

2 **Copilot enabled in Excel**

Check: open Excel → look for the Copilot button in the Home ribbon.
If it is greyed out, your admin may need to enable it, or your plan may not include it.

Fallback: Excel for the web at office.com has a limited free Copilot tier.

REQUIRED

3 **The practice file downloaded**

260324_Webinar_MKT_Funnel_FINAL.xlsx
Open it now and leave it ready. All prompts in the webinar reference the sheet names in this file.

OPTIONAL

4 **DataCamp account (optional)**

Not needed today, but useful for the follow-up courses linked at the end of the session.

Not sure if Copilot is enabled? Open Excel → Home tab → look for the Copilot button. No button = not enabled. See microsoft.com/en-us/microsoft-365/copilot/microsoft-365-copilot-setup for setup steps.

Seven Steps. One Workbook.

Setup
I
Format data as Tables — Copilot's foundation

Describe the Data
II
Let Copilot summarise the raw dataset for you

Clean & Normalise
III
De-dupe, fix dates, standardise source names

Merge Event & Revenue Data
IV
Join revenue records to event rows on User_ID + date

Build the MKT Funnel
V
Pivot → funnel table → chart → Copilot insights

Workout Deep Dive
V+
Segment trial users by workout time to find the activation sweet spot

Channel Analysis
VI
Volume vs efficiency: which channel pays for itself?

Summarise & Ship
VII
Auto-generate an Insight Summary sheet & tidy the workbook

Set Up Your Workspace

Microsoft:

"Keep your main data in one clean, formatted table. Unstructured ranges or data scattered across multiple areas can limit the quality of results."

Copilot Prompt

"Turn the data into tables"

One prompt — Copilot formats both raw tables.
Then: "Describe the data in the workbook"

What you get

- event_data_raw — 11,466 rows, 7 columns
- revenue_data_raw — 962 rows, 6 columns
- Copilot flags: date inconsistencies, mixed-case sources

Two separate raw tables

event_data_raw + revenue_data_raw

Raw data stays untouched

Every transformation → new sheet

Name your sheets clearly

Copilot references sheet names in its responses

Three Cleaning Steps

1

Remove duplicates — new sheet

Output: event_data_duplicates_removed
11,342 rows (124 duplicates removed)

Copilot

"Is there any duplication of data, i.e. entries of the exact same data in all columns?"
"Create a new sheet 'event_data_duplicates_removed' removing the found duplicates."

2

Standardise dates → Event_Date_clean

Formats in the wild:
26-03-2024 / 45364 (serial) / 12/02/2024
All become: 2024-03-26 (YYYY-MM-DD)

Copilot

"Create a new column 'Event_Date_clean' next to Event_Date formatted identically to Event_Date in revenue_data_raw, being careful not to mistake months for days"

3

Standardise source names → Last_Touch_Source_clean

google paid search / Google Ads / META
All become: Meta, Affiliates, Organic, Google Paid Search

Copilot

"In event_data_duplicates_removed create a column 'Last_Touch_Source_clean' standardising values to: Meta, Organic (incl. Organic Search), Affiliates, Google Paid Search — turning all Google Ads variations into Google Paid Search"
Key tip: always name the sheet in your prompt

Joining Two Tables Into One

1

Create event_&_rev_data sheet

Copy: User_ID · Event_Date_clean · Event_Type · Class_Type · Workout_Time · Last_Touch_Source_clean · Last_Touch_Campaign

Copilot

"Create a new sheet 'event_&_rev_data' and copy over the 7 columns from event_data_duplicates_removed"

2

Match revenue columns by User_ID + Event_Date

Brings in Revenue_Type · Subscription_Type · Revenue_Amount for rows where Event_Type = Annual/Monthly Subscription

Copilot

"Based on User_ID and Event_Date match Revenue_Type, Subscription_Type and Revenue_Amount to Event_Type = Annual/Monthly Subscription in event_&_rev_data"

3

Add Event_Type_all column

Copies Event_Type — but replaces Annual/Monthly Subscription rows with the Revenue_Type value (New Subscription or Renewal)

Copilot

"Add a column 'Event_Type_all': copy Event_Type, but if Annual/Monthly Subscription fill in the Revenue_Type value instead"

Output: event_&_rev_data — 11,342 rows · 11 columns · Event_Type_all ready for the pivot table

The 5-Stage Marketing Funnel

Copilot
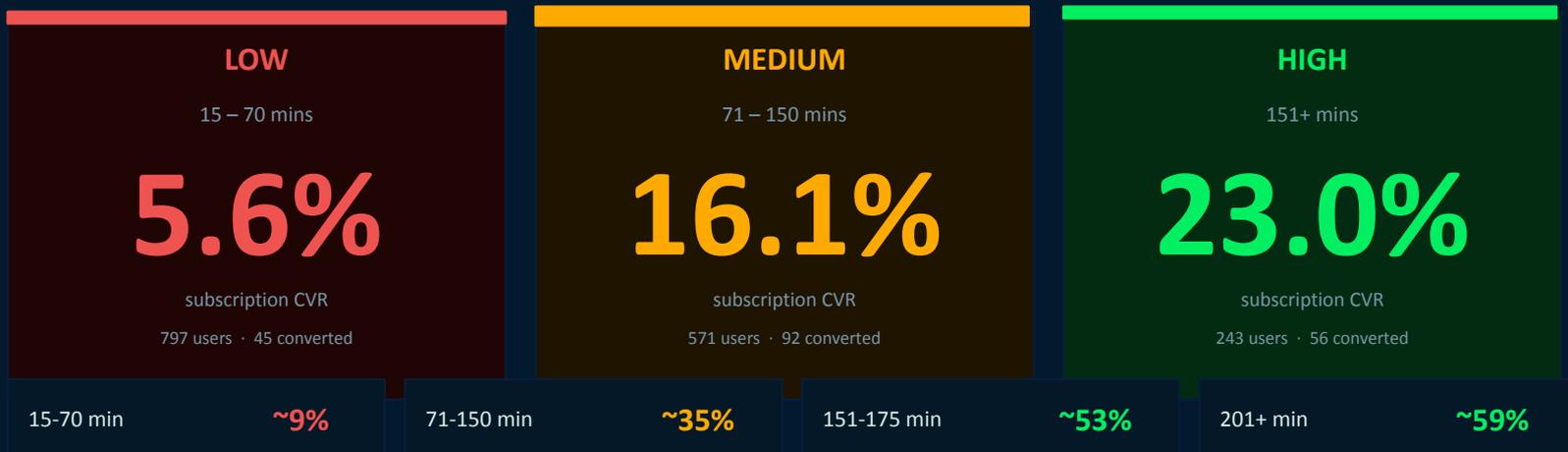1. *"Create a pivot table in a new sheet based on the data in 'event_&_rev_data' with 1)Rows: User_ID, 2) Columns: Event_Type_all and 3) Values: Count of Event_Type_all"*
2. *"Create a new sheet called 'MKT_funnel' counting the number of unique User_IDs in the pivot table with 'Registration' >0. Do the same for 'Trial Start', 'Workout', 'New Subscription' and 'Renewal'"*
3. *"Calculate the 'Funnel CVR' by calculating how many users in the Funnel Stage 'Registration' make it into a following funnel stage"*

STAGE	USERS	% OF REGISTRANTS		DROP-OFF
● Registration	3,201		100.0%	
● Trial Start	2,619		81.8%	*-18.2%*
● Workout	1,959		61.2%	*-20.6%*
● New Subscription	588		18.4%	*-42.8%*
● Renewal	365		11.4%	*-7.0%*

Copilot Insight: "Focus on converting workout users to subscribers — the biggest opportunity." Only 18.4% of registrants become paying customers.

More Workout Time = More Subscriptions

Segment trial users by total workout minutes in PivotTable_WorkoutData → workout_time_subscription_2 → Workout_Segmentation

LOW	MEDIUM	HIGH
15 – 70 mins	71 – 150 mins	151+ mins
5.6%	**16.1%**	**23.0%**
subscription CVR	subscription CVR	subscription CVR
797 users · 45 converted	571 users · 92 converted	243 users · 56 converted

15-70 min	~9%	71-150 min	~35%	151-175 min	~53%	201+ min	~59%

4-prompt flow:

Pivot (User_ID × Class_Type, Sum Workout_Time, Filter=Workout) › "What are good ranges to cluster into High / Medium / Low?" › workout_time_subscription_2: User_IDs + Grand Total + Sub flag › "What are the insights on workout time and subscription probability?"

Sweet spot: 120+ mins during trial. Activation idea: structured plan — 4 sessions x 30 min per week = 120 min total. Sub CVR jumps from 9% (Low) to 23% (High) — 4x lift.

I Setup	II Describe	III Clean	IV Merge	**V Funnel**	VI Channel	VII Wrap-up

Which Channel Works Hardest?

Volume tells you reach. Sub CVR + Revenue per Registration tell you which channel to invest more in.

Channel	Registrations	New Subs	Sub CVR	Revenue	Rev / Registration	Avg Rev / Transaction
Affiliates	**889**	**184**	**20.7%**	$49,068	**$55.2**	$165
Google Paid Search	**895**	**156**	**17.4%**	$40,687	**$45.5**	$162
Meta	**855**	**148**	**17.3%**	$36,105	**$42.2**	$147
Organic	**573**	**99**	**17.3%**	$26,477	**$46.2**	$169

Copilot prompts to build this:
"Add Sub CVR = New Subscription ÷ Registration (%) and Revenue per Registration = Revenue ÷ Registration" · "Add a chart: Registration + New Subs as bars (left axis), Sub CVR as line (right axis)" · "Add a chart: Rev per Registration per channel" · "What are the key findings? Insert into source_per_event"

Affiliates wins on both: 20.7% Sub CVR and $55.2 Rev per Registration vs $42.2 for Meta. Clear case to invest more.

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Wrap Up Your Workbook

Copilot Prompt

"Summarise the findings of this analysis across all sheets in a new sheet called 'Insight Summary'"

One prompt — Copilot reads all sheets and writes the summary.

What Copilot generates

- Funnel health overview + CVR table
- Workout time segmentation findings
- Channel performance + top-channel call-out
- Recommended next actions

Tidy the workbook before sharing

Sheet order
Insight Summary first, then MKT_funnel, then analysis sheets

Tab colours
Group raw data (grey) / cleaned (blue) / analysis (green) / summary (bright)

Review output
Spot-check Copilot's formulas before sending to stakeholders

The Insight Summary sheet is the one thing stakeholders will actually read. Review it carefully, check that the numbers match your analysis sheets, and edit Copilot's wording where needed.

Working Smarter with Copilot in Excel

Format data as a Table before anything else

Copilot works best with a single, named, formatted Table. Unstructured ranges significantly reduce quality.

Keep raw data untouched — always work in a new sheet

Create a new sheet for every transformation. You will need the original as a reference.

Use exact column names as they appear in headers

Copy-paste column names into your prompt. Paraphrasing them is a common source of Copilot errors.

Verify outputs — spot-check with COUNTIF / SUM

Always confirm Copilot's counts. In this webinar: =COUNTIF(range, value) to validate funnel numbers.

When to start a new chat

Ask: "Would this prompt make sense without my previous prompts?" Yes → new chat. No → stay.

Always name the sheet in your prompt

"In the sheet 'event_data_duplicates_removed'..." — without it, Copilot may act on the wrong sheet.

Break complex tasks into smaller steps

"Create column, then calculate, then format" beats a single monster prompt. Copilot is more reliable in small bites.

Ask Copilot to explain what it did

E.g. "Why does this column look different?" turns a confusing result into a teaching moment.

Know when manual is faster

Simple fills like =IF([@Col]="","n/a",[@Col]) are quicker to type than prompt. Use Copilot for complex logic.

If stuck: fresh chat + clean table

Long chat histories confuse Copilot. A new chat referencing just the target table often works immediately.

Q&A

Questions & Discussion

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Practice File

The Excel workbook from this session is available to download. Feel free to follow along, extend the analysis, break things.

DataCamp Courses

Data Analysis with Excel · Excel Fundamentals · Copilot for Data Analysts