Excel Campus

AI Prompts for Excel Dashboard Design

If you've ever stared at a blank Excel sheet wondering how to turn it into a dashboard your team will actually use, this guide is for you.

Inside are the two prompts that do the heavy lifting when I design dashboards with AI. The first builds a realistic fake data set so you can prototype without touching sensitive data. The second designs the dashboard itself as an interactive web page, so you can iterate on the layout in seconds instead of fighting with Excel chart settings.

Once the design is dialed in, you build it for real in Excel using your actual data. Two prompts, one solid dashboard. Let's get to it.

Step 1: Create a Fake Data Set

Before AI can design a dashboard, it needs data. Sharing your real data isn't always an option, so the move is to have AI generate a realistic fake data set that mimics yours. Same column names, same kinds of values, and the seasonality and trends you'd expect.

Use the prompt below as a starting point. Replace the bracketed text with details that match your business. The more specific you are, the more useful the data set will be.

The Prompt

```
I'd like to get your help creating a fake data set that contains [sales information for a water sports rental shop that rents kayaks, paddle boards, etc.]

[The data set should contain 3,000 rows of data for the entire year, with seasonality trends and more sales in the summer months. There should also be a column for the employee's name responsible for the sale, with a total of 10 different employees. Each row should be for one rental item.]

Do you have any questions on this task?
```

What to swap in

Any text in [square brackets] can be modified for your scenario.

- **Business description**: what your company actually sells or tracks

- **Row count and time period**: 3,000 rows over a year is plenty for most dashboards, adjust if needed
- **Seasonality and trends**: describe the patterns you'd expect (peak in Q4, slow in summer, growth year over year, etc.)
- **Columns**: list the columns your real data has (employee, region, product, customer type, etc.)

The "Do you have any questions on this task?" line at the end is intentional. It gives the AI a chance to clarify before generating, which usually produces a better data set on the first try.

Step 2: Design the Dashboard

Once you have a data set (real or fake), the second prompt designs the dashboard. The output is an interactive HTML web page, not an Excel file. That sounds backwards, but here's why it works.

HTML is fast to iterate on. You can ask the AI to swap a chart type, change the layout, or reorder cards, and see the result in seconds. Doing the same thing in Excel means rebuilding charts, dragging things around, and wrestling with formatting. Get the design right in HTML first, then build the final version in Excel with your real data.

Which AI tool to use

Any of the big three chat assistants handle this prompt fine. The difference is how each one previews the HTML:

- **ChatGPT**: turn on the **Canvas** feature so the HTML renders in a side-by-side preview pane.
- **Gemini**: use **Canvas** as well, same idea.
- **Claude**: no setting to flip. Claude returns the HTML inside an **Artifact** that previews automatically.
- **Copilot:** Copilot does have this capability but it's a bit more difficult to trigger. You might need to specify something like, "Please create an interactive app with UI so I can preview this dashboard." Either in the first prompt or a follow-up prompt.
  There is also a App Agent Builder (Frontier) that can create interactive webpages.
  Neither of these Copilot solutions are as easy as the 3 models mentioned above, but it is possible with Copilot if you can't use the other models.

The Prompt

```
I'd like to get your help designing a dashboard for the attached data set.

The dashboard should contain [simple charts that are easy for my coworkers (audience) to understand.]

[Audience is business professionals across several departments, and not all are well versed in data analytics and data visualization. So keep it simple.]

[Make sure the dashboard includes the following:
- Line chart for sales over time
- Bar chart for sales by team member]

Provide additional charts or metrics that are interesting.

[Keep the dashboard simple with 4 to 6 charts max and some cards]

[Use my brand color palette or default Office theme]

Consider data visualization best practices when designing the charts.

The dashboard will eventually be built into Excel, so take that into consideration when designing. But I would first like you to code an interactive web page so we can quickly iterate on the design.

The output should be a web page.

What questions do you have about this project/task before you get started?
```

What to swap in

Any text in [square brackets] can be modified for your scenario.

- **Audience description**: who will actually use this dashboard, and how comfortable they are with data
- **Must-have charts**: the specific charts you know your audience needs
- **Chart count**: 4 to 6 is a solid cap, more than that and the dashboard starts feeling cluttered
- **Brand colors**: paste your hex codes or say "default Office theme"

Iterating on the design

After the first version lands, keep asking for changes in plain English:

> *Swap the line chart for an area chart and move the cards to the top right.*
>
> *The bar chart is too tall. Make it half the height and put the legend on the right.*

When the layout feels right, screenshot it (or save the HTML) and use it as the reference when you build the final dashboard in Excel.

Wrapping Up

That's the whole workflow. Two prompts, plus your real data when you're ready to build the final version.

If you want to see this in action, watch the companion video where I walk through both steps end to end. And if you want to go deeper on Excel dashboards (formulas, slicers, refreshable connections, all of it), check out our Elevate Excel Training Programs at ExcelCampus.com/courses.

Happy designing.