

Your workshop workbook

90 minutes · Complete one useful task and learn how to check it

Use this workbook as we practice. You can type into the shaded fields or print it and write by hand. Keep the source files unchanged. Use a separate name for the result you create.

Today you will

- Delegate a clear task using Outcome, Context and Standard.
- Create a workbook from the two fictional sales files.
- Check a result, request a focused improvement and save it.
- Write one work order you can use in your business.

Before we begin: confidence from 1 to 5

1 = I would need step-by-step help. 5 = I can delegate a small task and review the result.

Keep these files nearby

donut-sales-july-2026.csv
donut-sales-august-2026.csv
column-definitions.html
copy-prompts.html

One small task I would like help with

Your guided work order

Minutes 10–25 · Copy this from [copy-prompts.html](#)

Outcome: Create an Excel workbook for the owner of a fictional donut shop to understand July and August 2026 sales and the amount left after direct product costs.

Context: Use only donut-sales-july-2026.csv, donut-sales-august-2026.csv. Each file has six product records. net_sales_usd is monthly product sales after discounts and refunds, excluding tax. direct_costs_usd is the monthly ingredients and packaging cost for the units sold; it excludes wages, rent, utilities and other overhead. Both dollar fields are already totals, so do not multiply them by units_sold. Each box is a separate sales unit. Box sales are not also included in individual-product rows.

Standard: Include three tabs: Source data, Product summary and Owner brief. Retain the month and source filename for each record. Summarize units, net sales, direct costs and amount left after direct costs by product. Keep individual donuts and boxes in separate groups. Do not combine donut and box quantities into one unit total. Use formulas for calculated amounts and summaries. Show dollars with two decimal places and label units clearly. The Owner brief should give three observations supported by the records, two possible next steps, and any limitations. Do not describe the amount left after direct costs as overall business profit. Flag missing information rather than guessing. Check that both months and all records are included, reconcile sales and direct-cost totals, and show how one product calculation works. Preserve the original files. Create the requested workbook only; do not send, publish, or change anything else.

First propose a short plan and identify essential questions. Wait for my approval before creating the workbook.

Before you approve the plan

Look for both files, three requested tabs, separate box handling and checks. Ask it to correct any unclear part before creating the workbook.

Create and inspect your workbook

Minutes 25–50

Once the plan matches the request, send the approval prompt. Answer essential questions and follow progress. You do not need to know how to write the formulas.

The plan is approved. Create the workbook now. Keep box products separate from individual donuts, and include the checks we agreed on.

The three tabs

Tab	What you should find
Source data	All 12 records with month and source filename
Product summary	Units, sales, direct costs and amount left by product
Owner brief	Three supported observations, two possible next steps and limitations

While it works: one question the owner needs answered

One finding and the source records that support it

If your run is delayed, use the completed example to practice review. You can repeat the generation step later. Tell the instructor which route you used.

Check and improve the result

Minutes 50–65 · Open the answer reveal when the instructor asks

Check	What to look for
Sources	Both months and all 12 records
Facts	Sales and cost totals; one product calculation
Gaps	Missing information and unsupported assumptions
Usefulness	Clear units, labels and plain-English findings
Final file	Your requested revision appears; checked totals still match

A fact or calculation I verified

One correction or useful improvement I requested

Final filename and where I saved it

My route: generated and reviewed / reviewed the provided example

If the result is correct, improve clarity instead of inventing an error. Save the successful prompt with the final file.

Your business work order

Minutes 75–84 · Choose a task small enough to check

Use your own suitable information or choose a fictional example from [personal-practice.html](#). You only need a saved work order today. A second finished deliverable is optional.

Outcome: the deliverable, audience and purpose

Context: files, sources and useful background

Standard: format, important checks and boundaries

One improvement after explaining it to someone

Your next step

Minutes 84–90 and the next 48 hours

Within 48 hours, I will use ChatGPT Work to

I will provide

I will check

After the workshop: confidence from 1 to 5

The most useful thing I learned

What still feels unclear

Try the task once, inspect the result, and save the prompt that worked. Notice whether the result reduced effort or improved quality before deciding to repeat or automate it.