AI and Automation Training

Build smarter workflows, one project at a time

👋 Why This Program Exists

For years, Excel has been my go-to tool for working efficiently. But as my business grew, I ran into tasks that Excel couldn't automate — things like sending emails, creating social media posts, or moving data between systems.

That's where AI and automation tools changed everything.

This program is my blueprint. You'll learn the exact tools and systems I use every day to save time, streamline operations, and scale with a tiny team. You don't need to know how to code. You just need to know where to start.

🧭 How the Program Works

The program is built around two simple types of lessons:

1. Tool Introductions

Get up to speed quickly with short videos that show what each tool does, how to set it up, and where it fits in your workflow.

Examples of the 10+ tools we'll cover:

- ChatGPT
- Copilot
- Zapier
- Airtable
- … many others that I use and trust

2. Hands-On Projects

Each project walks you through how to automate a specific task or solve a real business problem. You'll learn by doing — with step-by-step guidance and templates to support you.

🧱 Your Training Roadmap

You'll start with the basics and build real systems step by step.
Some modules are available now, others are rolling out over time.

📘 Module 1: AI & Automation Foundations

Use AI on its own. Use automation on its own. Then combine them for powerful results. For example:

- Learn how to prompt and brainstorm with ChatGPT
- Build a basic automation that posts new form entries
- Add ChatGPT to an automation to summarize survey results

⚙️ Module 2: Personal Productivity

Start with quick wins: automate daily tasks and reclaim your time. For example:

- Send an email to the appropriate to-do list to clear your inbox
- Get morning briefing emails sent automatically
- Leverage Copilot to write Excel formulas and even VBA

📊 Module 3: Business Tasks – Accounting & Finance

Automate reporting, reconciliation, and common finance workflows. For example:

- Auto-import ecommerce sales into QuickBooks in real time
- Log transactions in real time to an Excel workbook
- Take action when a new row is added to an Excel workbook

📣 Module 4: Business Tasks – Sales & Marketing

Attract and nurture leads, deliver offers, and personalize follow-up. For example:

- Automate social media posts to attract new leads

- Nurture leads by sending value and offers

- Send a welcome email sequence to new customers

📦 Module 5: Business Tasks – Operations

Automate task routing, handoffs, and internal systems. For example:

- Automatically notify staff when task is ready for them

- Offer existing customers upgrade opportunities

- Manage customer cancellations with seamless automation

🔍 Module 6: Deep Dives

Explore APIs, webhooks, and content automation once your foundation is solid. For example:

- Retrieve latest blog post and auto-generate social posts

- Use a webhook when no Zapier integration exists

- Convert a YouTube transcript into a blog post using AI

🎯 Final Word

You don't need to automate everything at once. But one project at a time, you can reclaim hours of your week, simplify your operations, and build systems that work for you — even while you sleep.

Ready to start your automation journey?

👉 Register by heading to https://www.excel-university.com/ai-training