

SETUP GUIDE

Installing the Vena Scenario Planning Skills

Add the four skills to Claude, ChatGPT or Microsoft 365 Copilot, then run the scenario planning workflow from the take-home workbook.

1

/vena-scenario-frame

Translate the mandate

2

/vena-scenario-model

Build the model

3

/vena-scenario-create

Create a scenario

4

/vena-scenario-summary

Compare and recommend

vena

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What you are installing

Four skills, one workbook, one model. Each skill is a folder with a SKILL.md and its own copy of the workbook contract and Python templates.

1 /vena-scenario-frame

Run from Actuals

Reads the mandate you paste in, proposes the target, the drivers to include and the limits, then fills the Frame sheet. Confirms before it writes.

2 /vena-scenario-model

Run from anywhere

Writes two Python in Excel cells. One forecasts each driver by backtesting four methods, one links the drivers to the target. Fills Base with the do-nothing baseline.

3 /vena-scenario-create

Run from Scenario Builder

Reads the form. Blank cells are solved, filled cells are locked. Infers top-down, bottom-up or hybrid, solves inside the limits, saves a Scenario N sheet.

4 /vena-scenario-summary

Run from Summary

One row per scenario with direct links, variance to baseline and target, then a recommendation and a plain-English narrative of what has to happen.

Inside each zip

SKILL.md

The instructions the assistant follows, with the trigger phrases and guardrails

reference/contract.md

The cell map of the workbook. Which sheet, row and column holds what, and the blank-means-solve rule

reference/python/

forecast_drivers.py, fit_target_model.py and solve_scenario.py, the code written into Python in Excel cells

Built for Claude in Excel

Claude and ChatGPT both accept SKILL.md skills as uploads, and both have an Excel add-in that can use them. Copilot takes the same files as agent instructions and knowledge. The skills were tested in Claude in Excel.

Claude

The native route. Skills upload once and appear in Claude in Excel, Claude.ai and the desktop app.

1

Open Skills settings

In Claude, go to Settings, then Capabilities, then Skills. Skills are available on Pro, Max, Team and Enterprise plans. On Team and Enterprise an admin may need to turn skills on for the organization first.

2

Upload each zip

Choose Upload skill and pick vena-scenario-frame.zip. Repeat for model, create and summary. Each zip must be uploaded on its own, because the root of the zip has to be one skill folder with its SKILL.md inside.

3

Enable them

Switch each of the four skills on. If you are replacing an earlier version, remove the old one first so the names do not clash.

4

Open the workbook in Excel

Open Scenario Planning - Starter File Webinar.xlsx in Excel for Windows, Mac or the web with the Claude add-in signed in. The skills are listed in the Claude pane.

5

Check Python in Excel

Type =PY("1+1",0) in a spare cell. If it shows 2 you are ready. If not, the model skill will stop and tell you. Python in Excel needs a Business or Enterprise Microsoft 365 plan and internet access.

6

Run the flow

On the Actuals sheet, type /vena-scenario-frame and paste the mandate. Then /vena-scenario-model, then /vena-scenario-create from Scenario Builder, then /vena-scenario-summary.

Tab order matters

Python cells calculate in sheet order. Keep Model before Base and Scenario Builder in the tab strip, or the solver will read stale values.

ChatGPT

ChatGPT supports the same SKILL.md format, and the ChatGPT for Excel add-in can use skills inside the workbook.

1

Check your plan

Skill upload is available on ChatGPT Business, Enterprise, Healthcare and Edu workspaces, subject to workspace settings. A workspace admin may need to allow members to upload skill files.

2

Open Skills

In ChatGPT, open Skills from the sidebar (under Plugins in current builds). Choose Create, then Upload from your computer.

3

Upload each zip

Upload vena-scenario-frame.zip, then model, create and summary, one at a time. ChatGPT scans each one before it becomes available. A skill marked Needs Review asks you to confirm before use.

4

Share if needed

Skills can be shared with teammates or published to the workspace library so the whole finance team runs the same workflow.

5

Install ChatGPT for Excel

Get the add-in from the Microsoft store. It is available on all plans. Open the starter workbook and sign in. Skills you have installed are available in the add-in.

6

Run the flow

On the Actuals sheet, ask for the frame skill and paste the mandate, then model, create and summary in order. The add-in asks for consent before it changes cells.

Two things to know

The skills were tested in Claude in Excel. In ChatGPT for Excel, confirm the add-in can write =PY() formulas and copy sheets in your build before the webinar. If a step cannot run in the sheet, upload the workbook to a ChatGPT chat with the skill installed and it will run the Python in Code Interpreter and return an updated file.

Microsoft 365 Copilot

Turn the skills into a declarative agent with Agent Builder. No code, and it lives next to Copilot in Excel.

1

Open Agent Builder

In the Microsoft 365 Copilot app (microsoft365.com/chat or Copilot in Teams), choose Create agent in the left pane. Skip the natural-language Describe tab and go to Configure.

2

Name and describe it

Name it Vena Scenario Planner. Description: guides finance through framing a mandate, building a driver model, creating scenarios and summarizing them in the scenario planning workbook.

3

Paste the instructions

In Instructions, paste the four SKILL.md files in order, frame first, with a line between them saying which step is which. Keep the guardrails, they stop the agent editing cells it should not.

4

Add knowledge

In Knowledge, upload contract.md and the three .py files from your device, or point the agent at a SharePoint folder holding them. Add the starter workbook there too.

5

Turn on Code Interpreter

Under Capabilities, enable Code Interpreter so the agent can run the Python templates when it builds the model and solves a scenario.

6

Test, then share

Use the test pane on the right with the mandate from the webinar. When it behaves, Create, then share with your team. An admin may need to allow agents in Integrated Apps.

Two things to know

Copilot in Excel works on the open workbook but its ability to write =PY() cells and copy sheets depends on your tenant's Copilot version. If a step cannot run in the sheet, upload the workbook to the agent in Copilot chat instead and it returns an updated file, the same way ChatGPT does.

Checklist and troubleshooting

Ten minutes of checks the day before saves the live demo.

- ☐ All four skills uploaded and switched on, old versions removed
- ☐ Starter workbook opens, Actuals has 36 months oldest first, costs entered as positive numbers
- ☐ `=PY("1+1",0)` returns 2 in a spare cell, then delete it
- ☐ Tab order is Actuals, Frame, Model, Base, Scenario Builder, Summary
- ☐ Mandate text ready to paste, aimed 15% or more above last year so the solver has visible work to do
- ☐ One dry run end to end, with a saved copy of the workbook at each step as a fallback

If something goes wrong

The skill is not listed

It is not enabled, the zip root was not a single folder, or in ChatGPT it is still scanning or marked Needs Review. Re-zip so the folder with SKILL.md is the top level and upload again.

#PYTHON! in a Model cell

Usually a blank driver row that is ticked, or a renamed sheet. The model skill reads the error and retries once. Untick empty drivers and rerun.

Status says target not reachable

Not an error. Every free driver is at its limit. Widen a limit on Actuals, add a driver, or save it as the best case inside the limits.

Summary shows a stale scenario

Rerun `/vena-scenario-summary`. It appends new scenarios and leaves existing rows alone.

Skills say Framing, sheet says Frame

Sheet names are part of the contract. Keep them as the skills expect, or update `contract.md` in each zip and re-upload.

Where this stops and Vena starts

The take-home runs on one file for one person. Vena adds live actuals, the real account hierarchy, scenario versions, workflow and an audit trail on the same method.