



Copilot scenarios for Finance



Copilot scenarios for Finance

Overview and KPIs

KPIs play a crucial role in organizations, providing a compass to navigate toward success. Let's dive into KPIs for Finance and how Copilot can assist.

Use case by role

Copilot can simplify the tasks that Finance employees perform every day. Look at key use cases and how Copilot can be your AI assistant along the way.

Day in the life

See how real-life Finance employees are using Copilot in their day-to-day.

Using Copilot in Finance



Goals and challenges

AI is transforming crucial tasks in Finance such as budgeting, forecasting, financial analysis, and corporate performance management. AI guided experiences can provide the ability to analyze vast amounts of data, utilize process-based data models to uncover valuable insights, and enhance the accuracy of financial projections.



Copilot can assist with ...

- [Optimize your financial operations Copilot](#)
- [Build a business case](#)
- [Improved collections processes](#)
- [Accounting document evaluation](#)
- [Launch a new Accounting app](#)
- [Contract review](#)
- [Contract accounting guidance](#)
- [Amendment comparisons](#)
- [Contract management](#)
- [Update a guidance document](#)



Finance roles



Accountant



Analyst



Auditor



Operations



Procurement

Transform Finance processes



Planning & analysis



Procure to pay



Risk management & compliance

Microsoft Copilot opportunity to impact key departmental KPIs



Days sales outstanding

Improve billing and collections processes by enhancing communications with customers and vendors.



Reduce spend on financial systems and tooling

Copilot can be extended into ERP systems and other processes to bring data together and speed decision-making without performing expensive updates to financial systems.



Reduce functional spending

Automate simple tasks that may currently be outsourced or performed by low-level employees.



Revenue growth



Cost savings and avoidance



Improve employee experience

KPI – Days sales outstanding



Collections play a crucial role in any business. Timely and efficient collections help ensure healthy cash flow, liquidity, and operational efficiency.

How Microsoft Copilot can help reduce day sales outstanding

Improve collections process

- Use Copilot to organize information from past interactions
- Draft communications with Copilot clearly outlining the collection process
- Analyze different payment methods and its effectiveness
- Connect your ERP or finance system to access customer records from directly within Outlook.

Improve customer meetings

- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications regarding outstanding balance or payment plan
- Connect your ERP or finance system to access customer records from directly within Outlook.



Roles

Collection Managers



Microsoft AI solutions

Copilot for Microsoft 365

Microsoft Copilot

Copilot for Finance in public preview

KPI – Reduce spend on financial systems and tooling



Microsoft Copilot can be extended into processes to bring data together and speed decision-making without performing expensive updates to financial systems.

How Microsoft Copilot can help reduce day sales outstanding

Inform your decisions

- Draft budgets and spreadsheets
- Search for cost variances across different options

Improve your data

- Use Copilot Studio for secure data retrieval from existing systems



Roles

Financial Analysts

Executive Leadership



Microsoft AI solutions

Copilot for Microsoft 365

Copilot Studio

Microsoft Copilot

Microsoft Copilot for Finance
in public preview

KPI – Reduce functional spending



As a cost center, Finance teams face the challenge of constantly achieving more with fewer resources. By assisting with everyday tasks, Microsoft Copilot can help increase time for additional analysis, proactive audits, collections processes, and financial reporting.

How Microsoft Copilot can reduce finance department spending

Keep communication lines open

- Draft communications such as approval requests, status emails, and supplier communications
- Summarize stakeholder meetings around budget status and approvals
- Create sourcing strategy decks

Reduce outsourcing requirements

- Assist with manual tasks allowing processes to be done internally

Avoid spend on finance system updates

- Extend financial systems with Copilot
- Extrapolate the risk and degree of impact by accessing customer data and distribution records to identify patterns for corrective change



Roles

Budget Analyst	Controller
Financial Planner	Data Managers
Treasury Manager	Strategic Planners
Risk Manager	



Microsoft AI solutions

Copilot for Microsoft 365
Microsoft Copilot + Viva

KPI – Improve risk management



Finance teams grapple with complex tasks—from credit and collections to risk management and compliance. Get real-time insights and strategic recommendations. By automating mundane tasks, Microsoft Copilot frees up time for critical decisions, streamlining audits, simplifying collections, and accelerating financial reporting.

How Copilot can reduce finance department spending

Speed data analysis and reporting

- Quickly analyze trends
- Generate informative charts
- Create strategy presentations

Efficient Email Management:

- Prioritize essential emails
- Speed email processing

Custom Support Chatbots

- Custom Support Chatbots (Built with Copilot Studio):
- Develop AI-powered chatbots to handle customer inquiries.
- Program chatbots to answer FAQs, provide product information, and escalate complex issues to human representatives



Roles

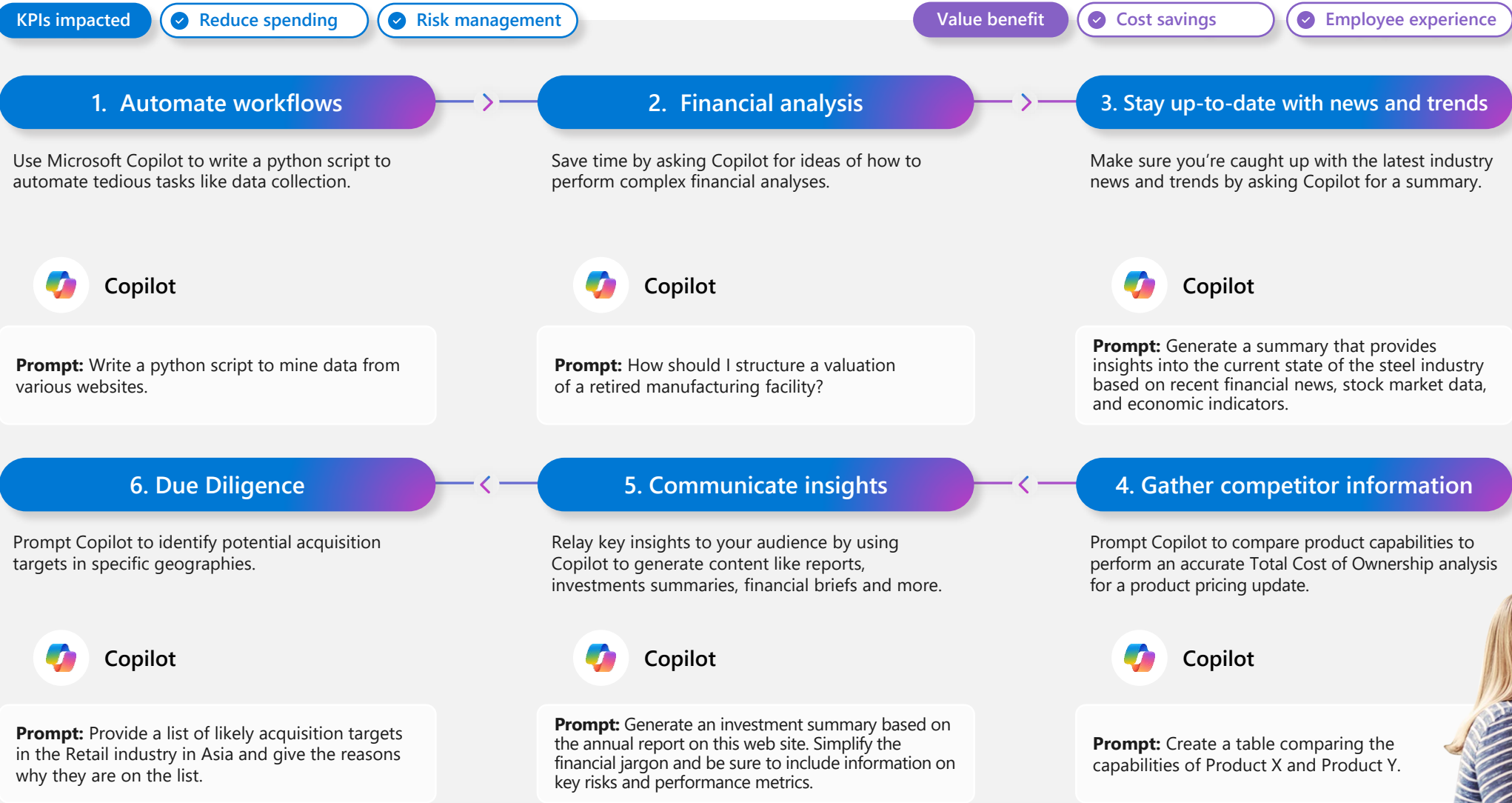
Budget Analyst
Risk Manager

Compliance

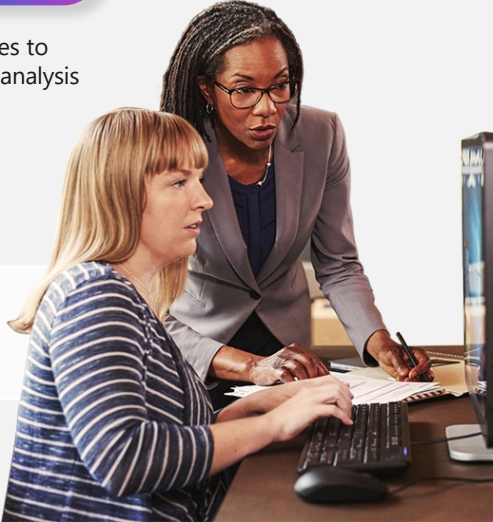


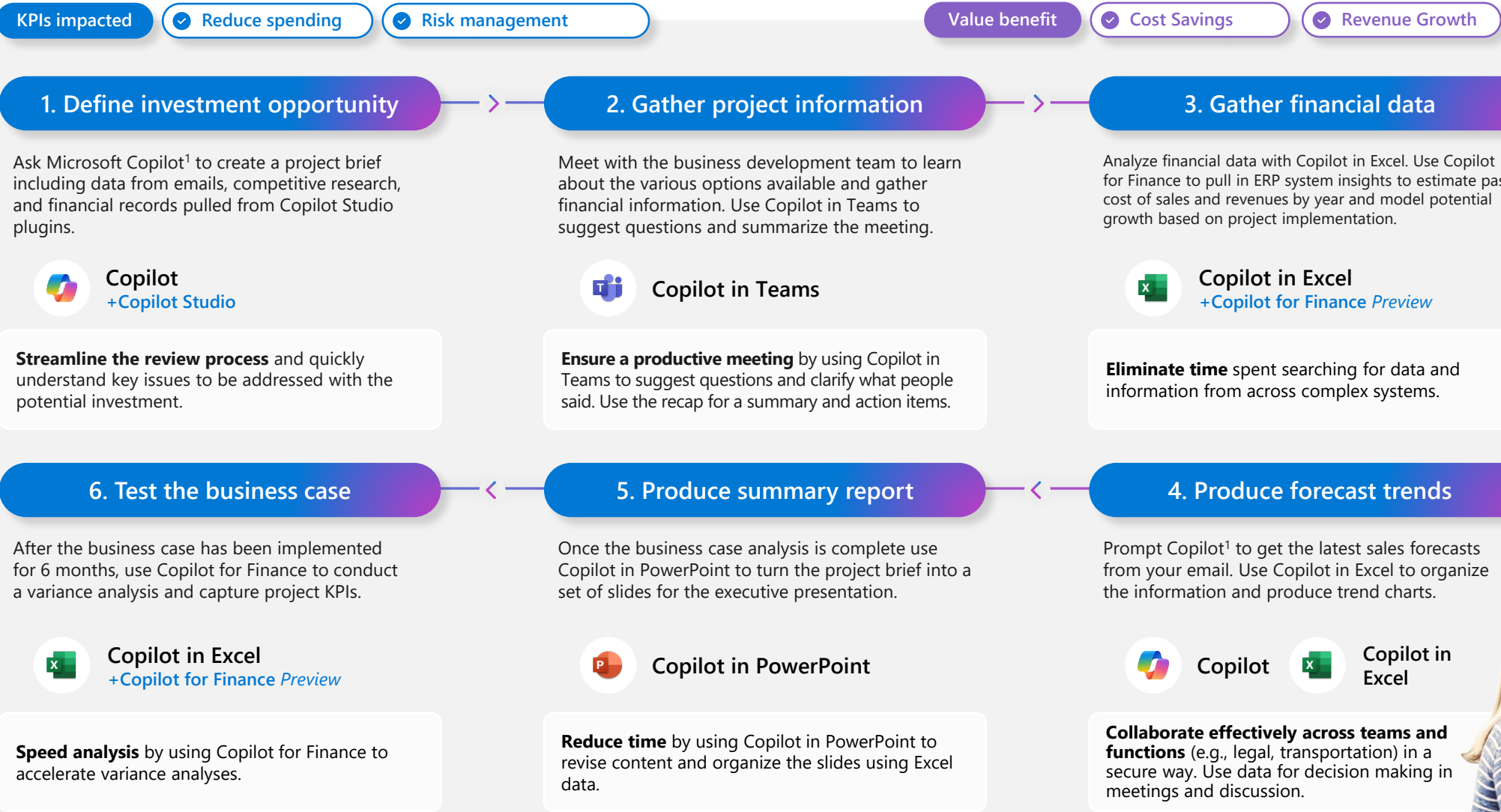
Microsoft AI solutions

Copilot for Microsoft 365
Microsoft Copilot
Copilot Studio

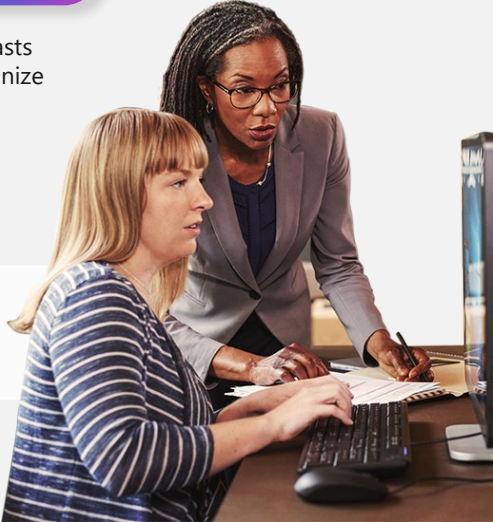


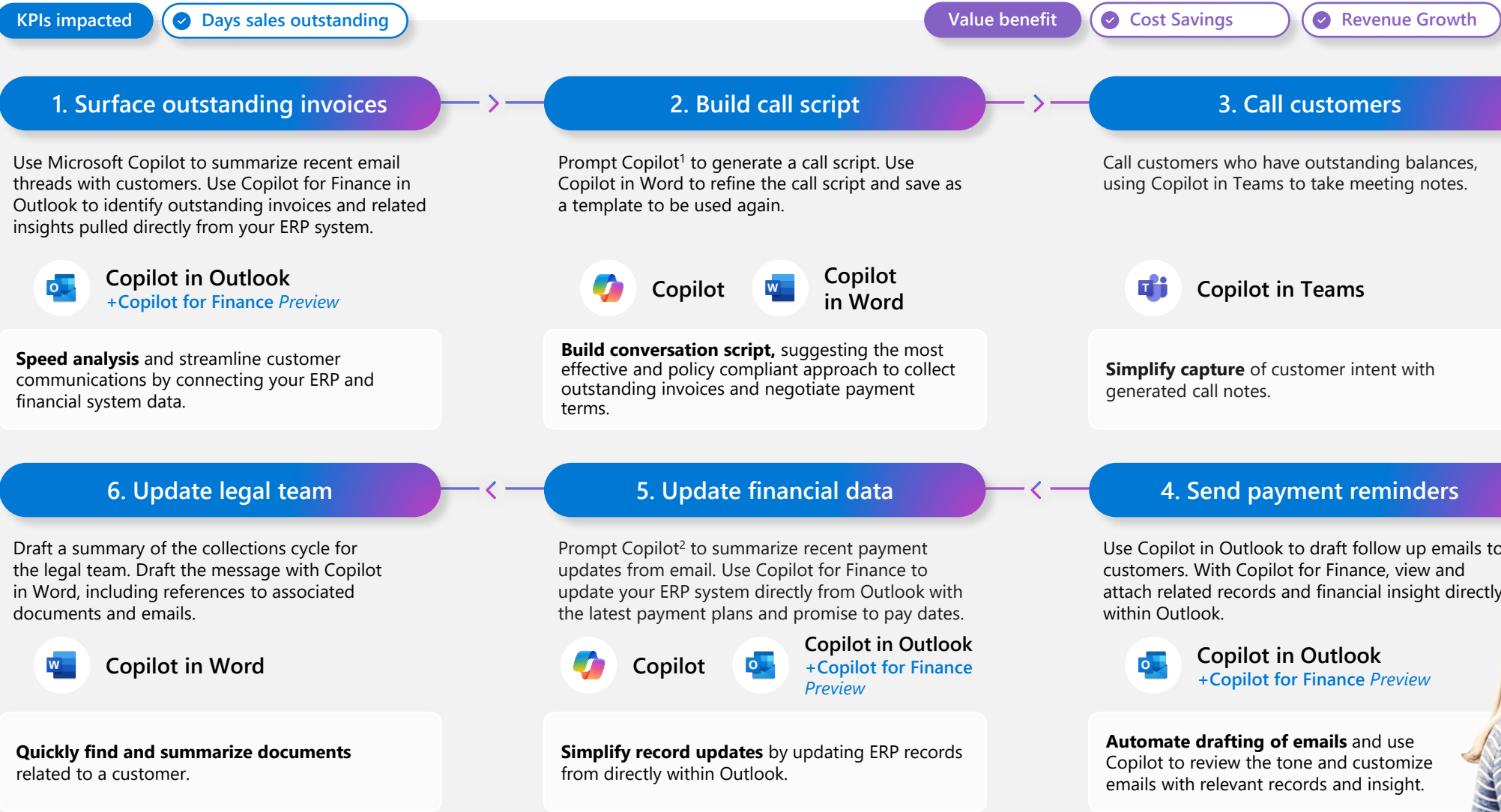
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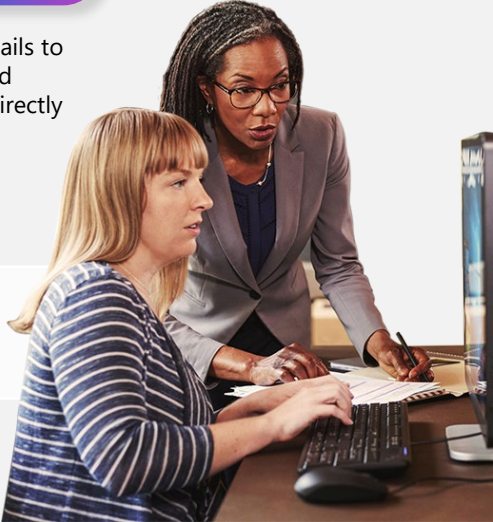


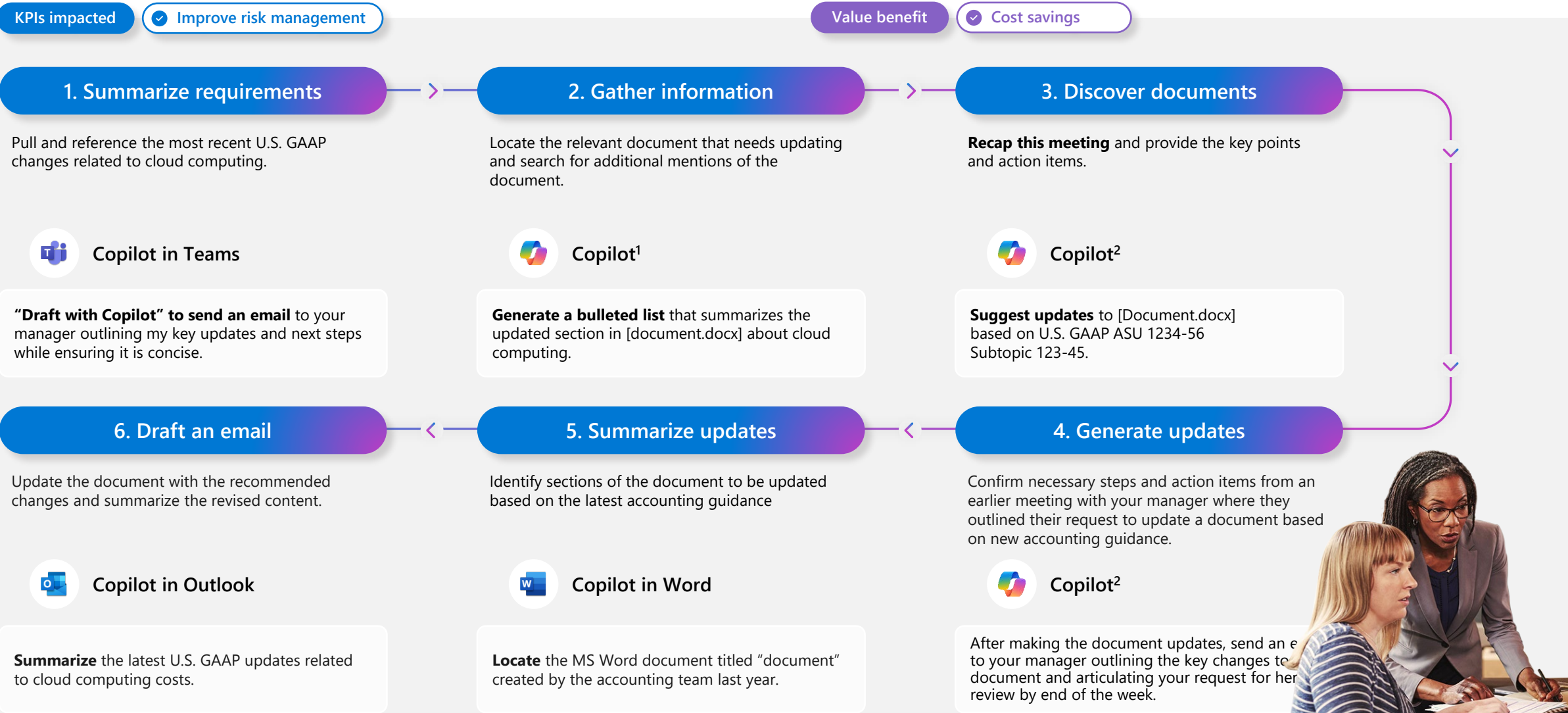
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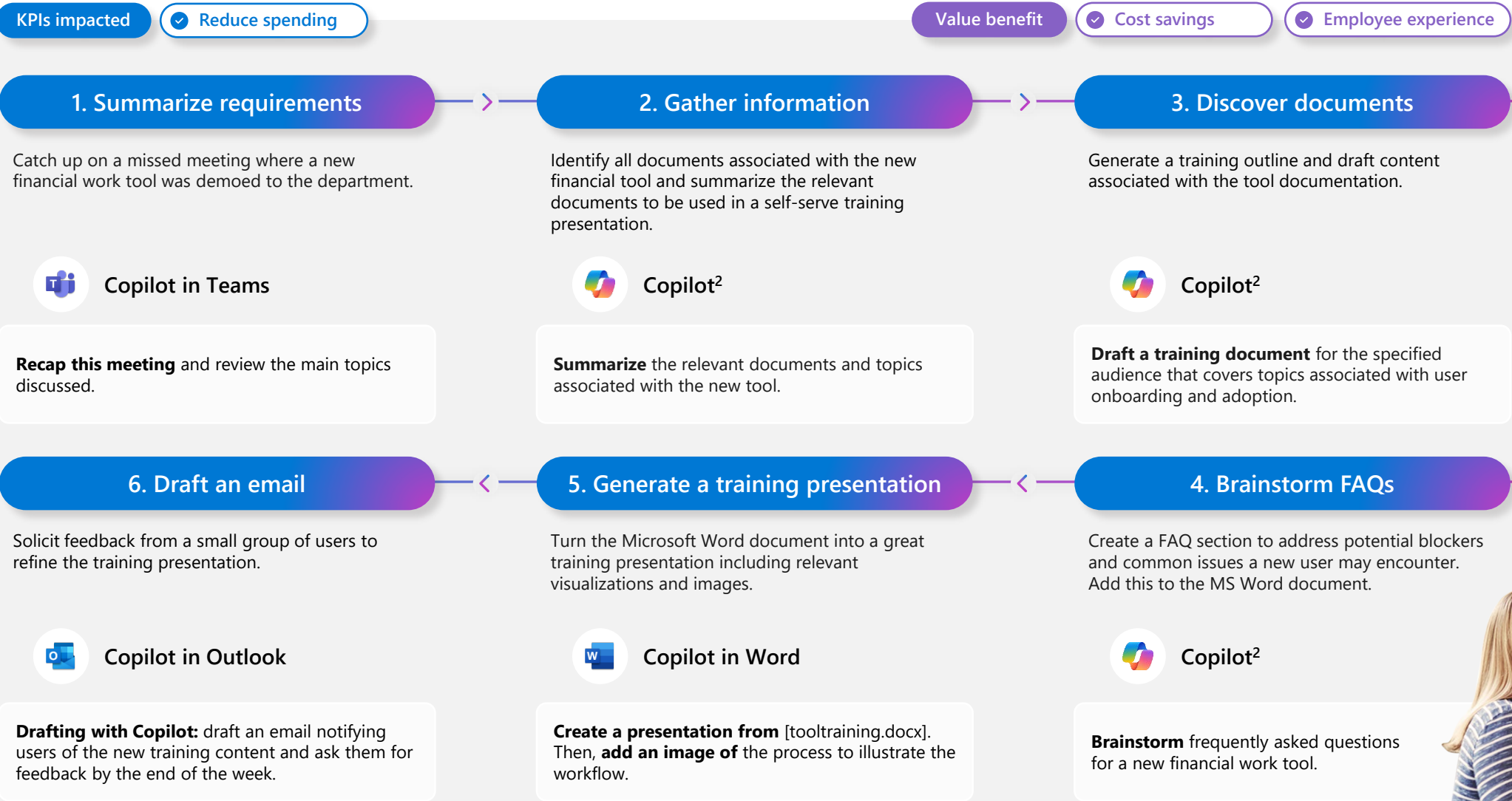
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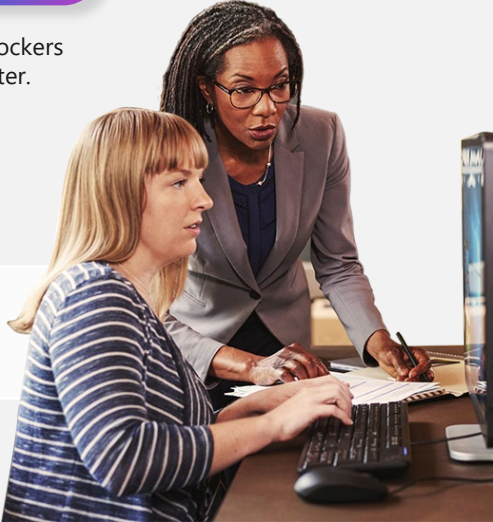


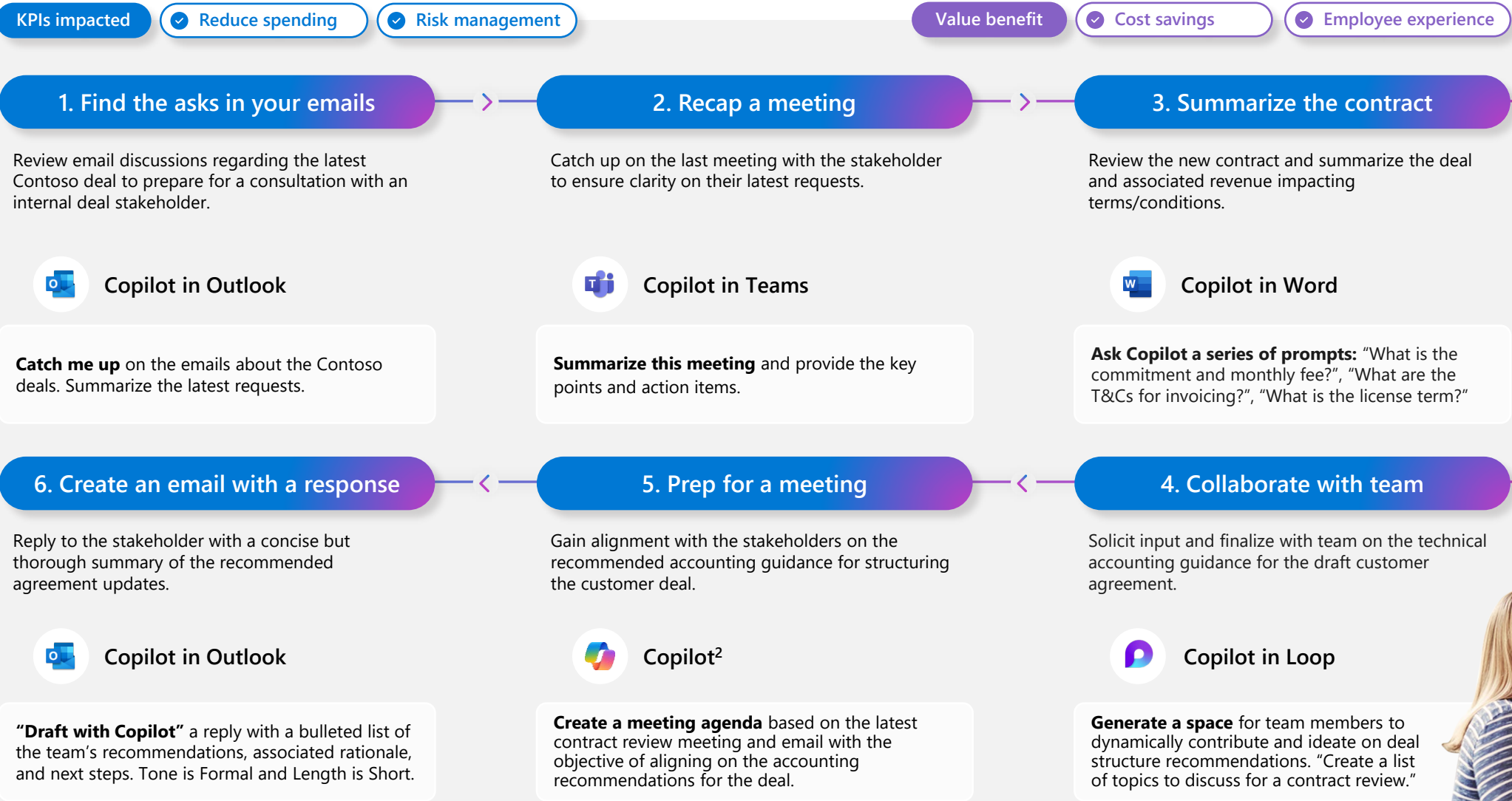
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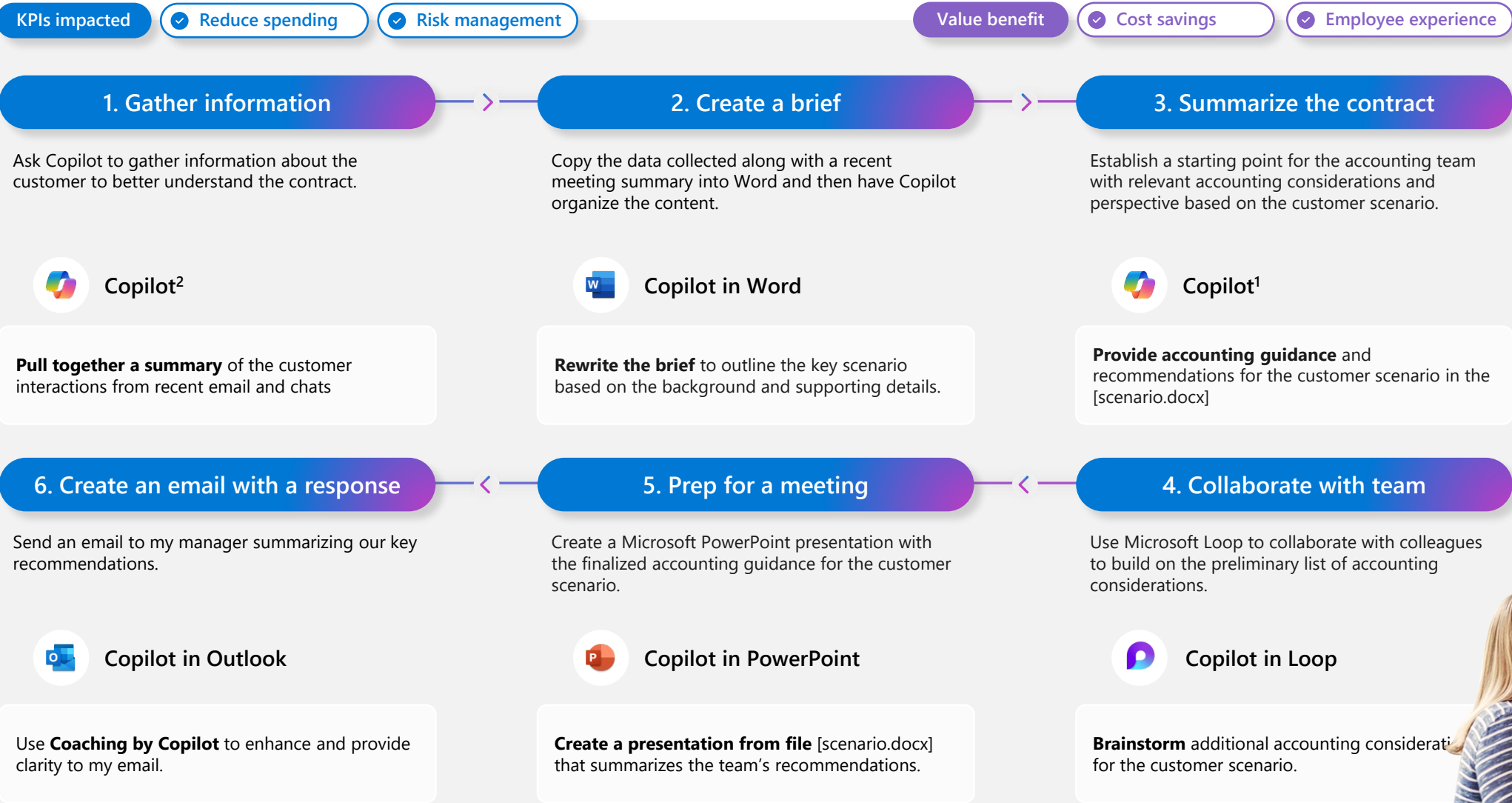
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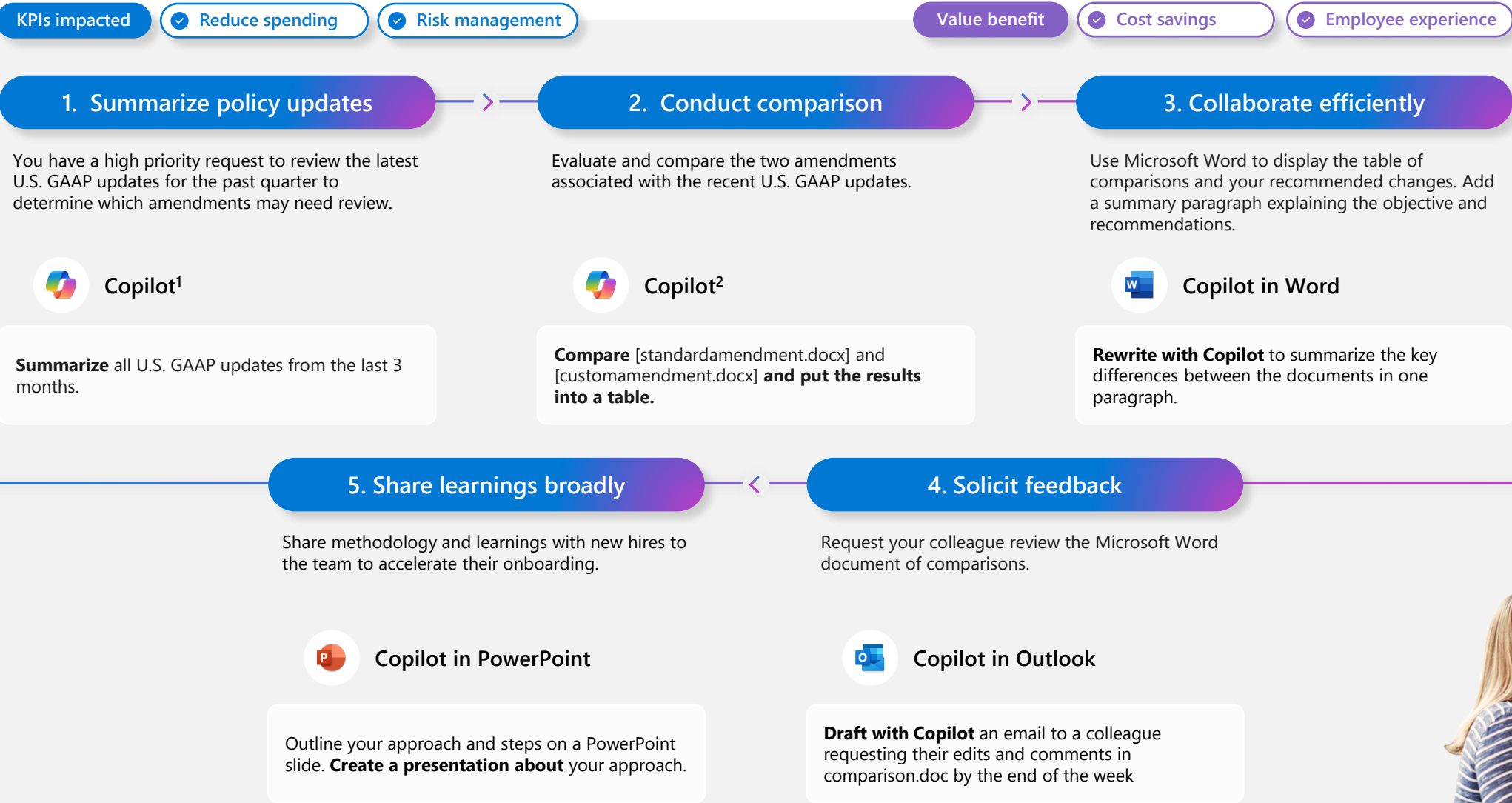
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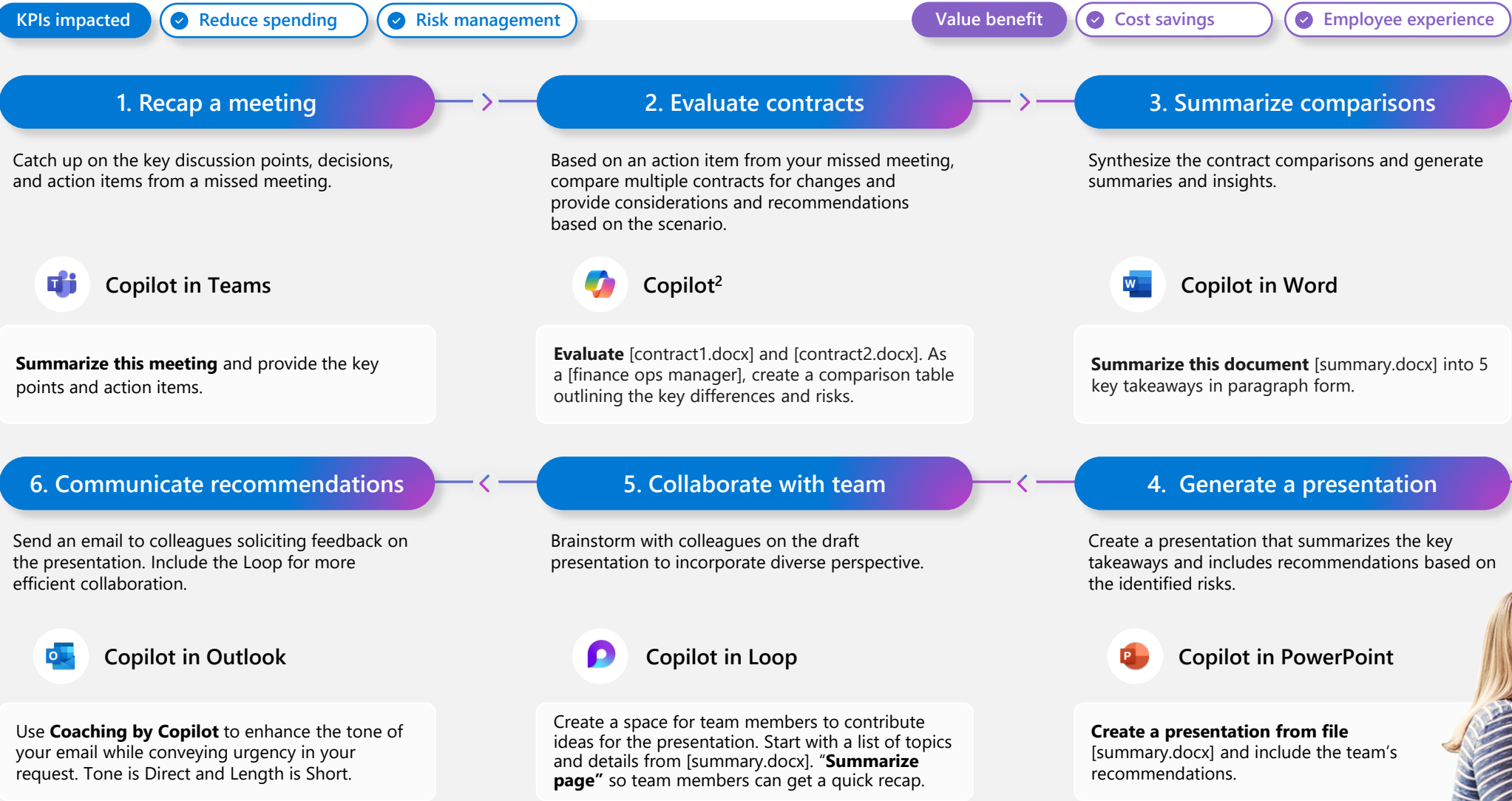
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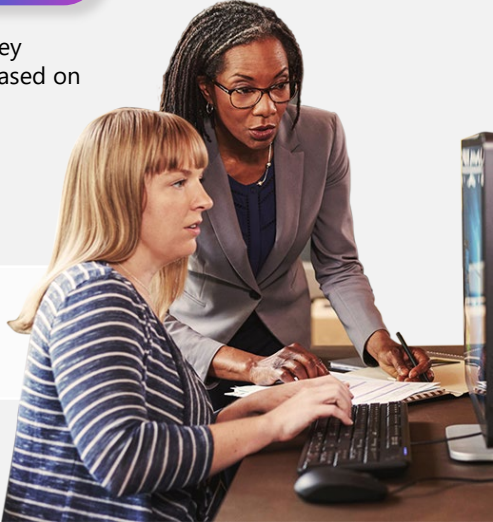


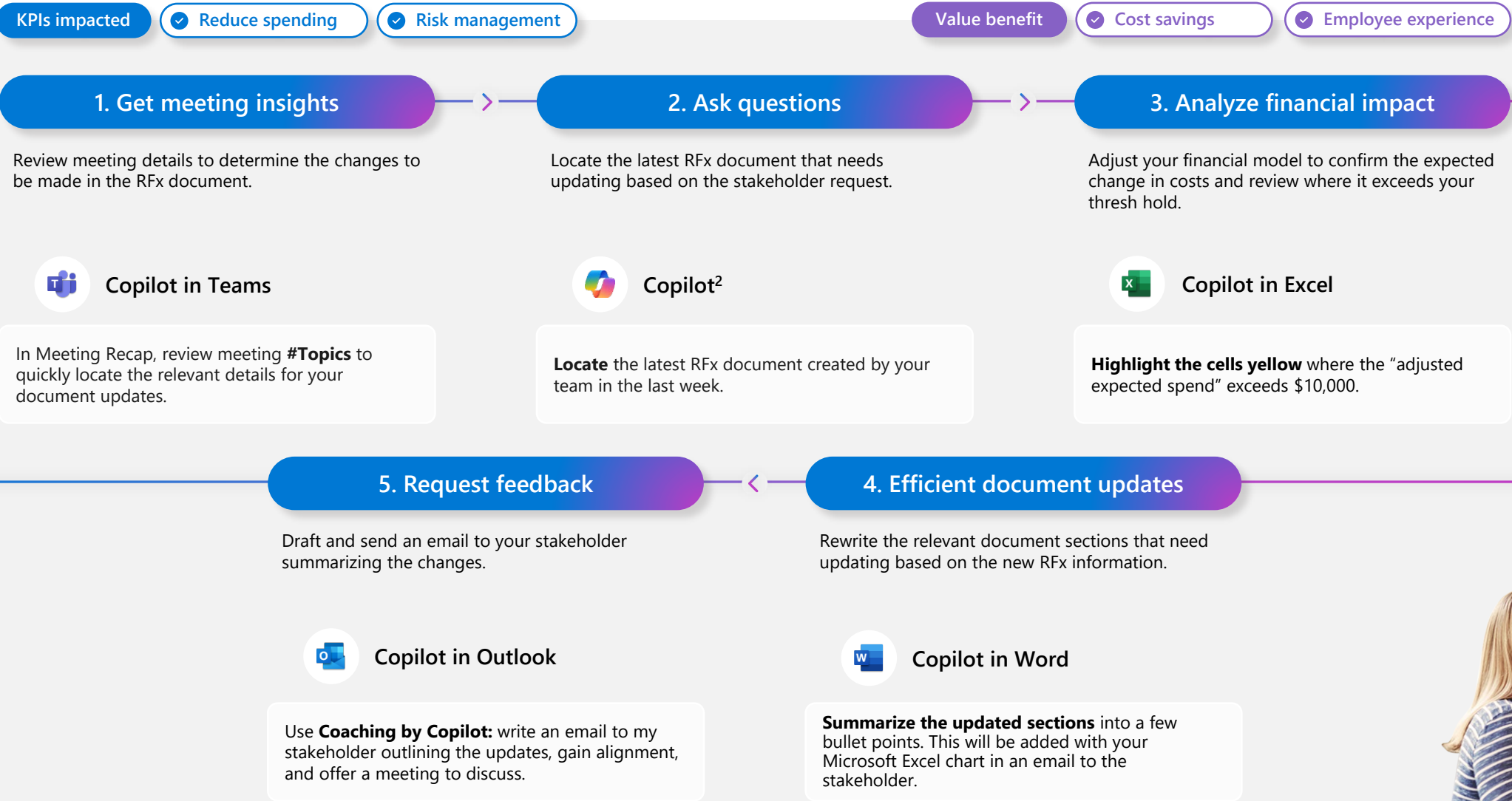
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A day in the life of an Income Tax Compliance Manager

Available with:
Copilot for Finance (includes Copilot for Microsoft 365) and **AI Builder**

Scenario level: 
Build

Benefits

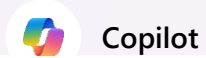
 ~1 hour per week

 Areas of investment: Learning new skills

 Focus on improving accuracy

8:00 am

Emma has several new emails from 3rd parties in relation to tax returns. Instead of reading through each email, she uses Microsoft Copilot¹ to summarize recent emails about tax returns.



Copilot

Summarize recent email threads about tax returns and list action items.

8:30 am

Emma reviews the final tax analysis using Copilot for Finance in Excel to check for any inconsistent formulas.



Copilot in Excel
+Copilot for Finance Preview

Explain the formula used to calculate depreciation for Contoso.

9:00 am

Emma requests Copilot¹ to create a list of all the emails and chats related to the Contoso tax return. She uses Copilot in Outlook to draft replies to an email thread with the tax preparation team.



Copilot



Copilot in Outlook

Summarize all the conversations about the Contoso return in my emails and Teams messages.

4:00 pm

Emma uses Copilot in SharePoint to get answers about previous tax returns without having to open the large pdf files.



Copilot in SharePoint

What was the opening cash balance on the US income tax return for Contoso?

2:00 pm

Emma uses Copilot for Finance in Excel to highlight any differences between the financial analysis and tax return. She asks it to highlight the variances and then adds the table to an email.



Copilot in Excel
+Copilot for Finance Preview

Add a formula column in 'Section D: Total Assets' showing the difference between the financial analysis and tax return data.

11:00 am

Emma receives an email to say the Tax Returns are ready for her review. Emma verifies the accuracy of tax return data using an OCR model she built in AI Builder instead of manually retyping it.



Copilot in Power Automate

Extract the information from a structured document.

Emma
works in
Tax & Customs



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A day in the life of an Audit, Risk and Compliance (ARC) Data Solution Manager

Available with:
Copilot for Microsoft 365 and AI Builder

Scenario level: 
Build 

Benefits

 ~1 hour per week

 Areas of investment: Automation

 Conducting more audits

8:00 am

Shali starts her day using Microsoft Copilot¹ to catch up on action items from the previous day. She also asks Copilot to prepare her for her upcoming meeting.



Copilot

Help me prep for my upcoming meetings I have today; including action items from the meeting. Draft follow up meeting agenda from meeting.

9:30 am

Shali later starts drafting a proposal for senior leadership review using the Meeting Recap and relevant files. She asks Copilot in Word to revise the draft to be more concise.



Copilot in Word

Write a project proposal using meeting notes in concise tone. List the pros and cons of solution from meeting notes. Visualize as a table.

10:00 am

Shali updates the reporting for stakeholders. She asks Copilot in Power BI to create an Intro tab and additional insights tab for her to explore other ideas.



Copilot in Power BI

Create a page to monitor the project scheduled hours, resource availability, and identify any gaps or overloads. Create DAX measure in Suggestions with Copilot.

4:00 pm

Shali uses Copilot in Outlook to summarize new emails and draft the project status update emails to the stakeholders.



Copilot in Outlook

Summarize the email and reply to confirm action items. Coaching with Copilot.

2:00 pm

She uses Power Apps to collect insights from various sources either text input or uploaded files. She asks Copilot in Power Apps to first suggest relevant fields then create an app based on the ask.



Copilot in PowerApps

Create an app to collect insights from files or text input box. Add a screen to display all insights with dropdown boxes on submitter.

11:00 am

After reviewing the reporting, Shali wants to set up automated alerts for potential overloads. She asks Copilot in Power Automate to create a flow to automate the process and analyze the automation activities.



Copilot in Power Automate

Write a SQL query to list all the audit projects in FY24. Create an automate flow that send alerts to users about Power BI reporting. Ask Copilot about which flow had the most run failures today?

Shali
is an ARC
Data Solution
Manager



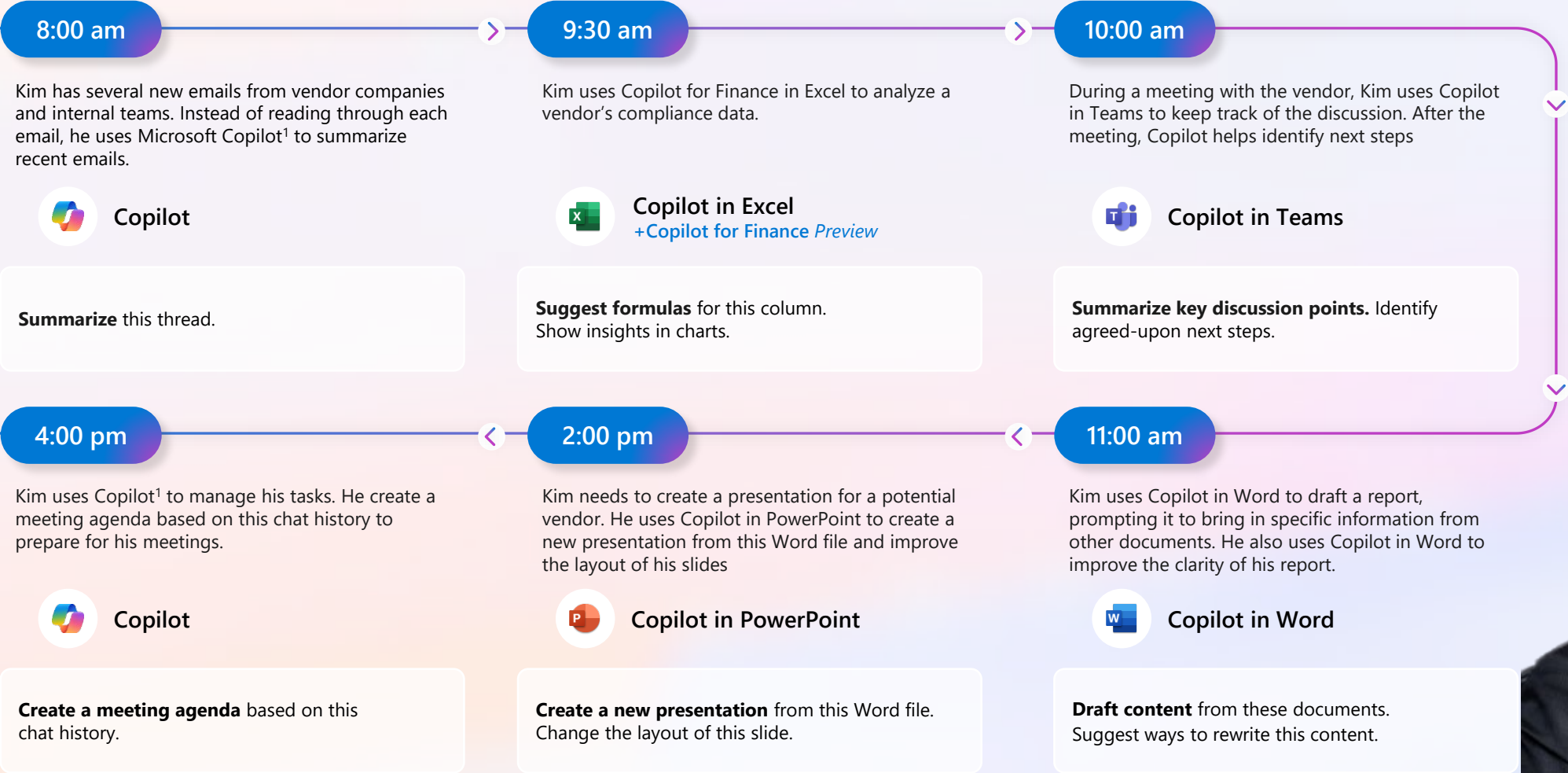
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A day in the life of a Vendor Engagement Manager

Available with:
Copilot for Finance (includes Copilot for Microsoft 365)

Scenario level:   

- Benefits
-  ~1 hour per week
-  Areas of investment: Vendor meetings
-  Vendor evaluations



Kim
is a Vendor
Engagement
Manager in
Finance



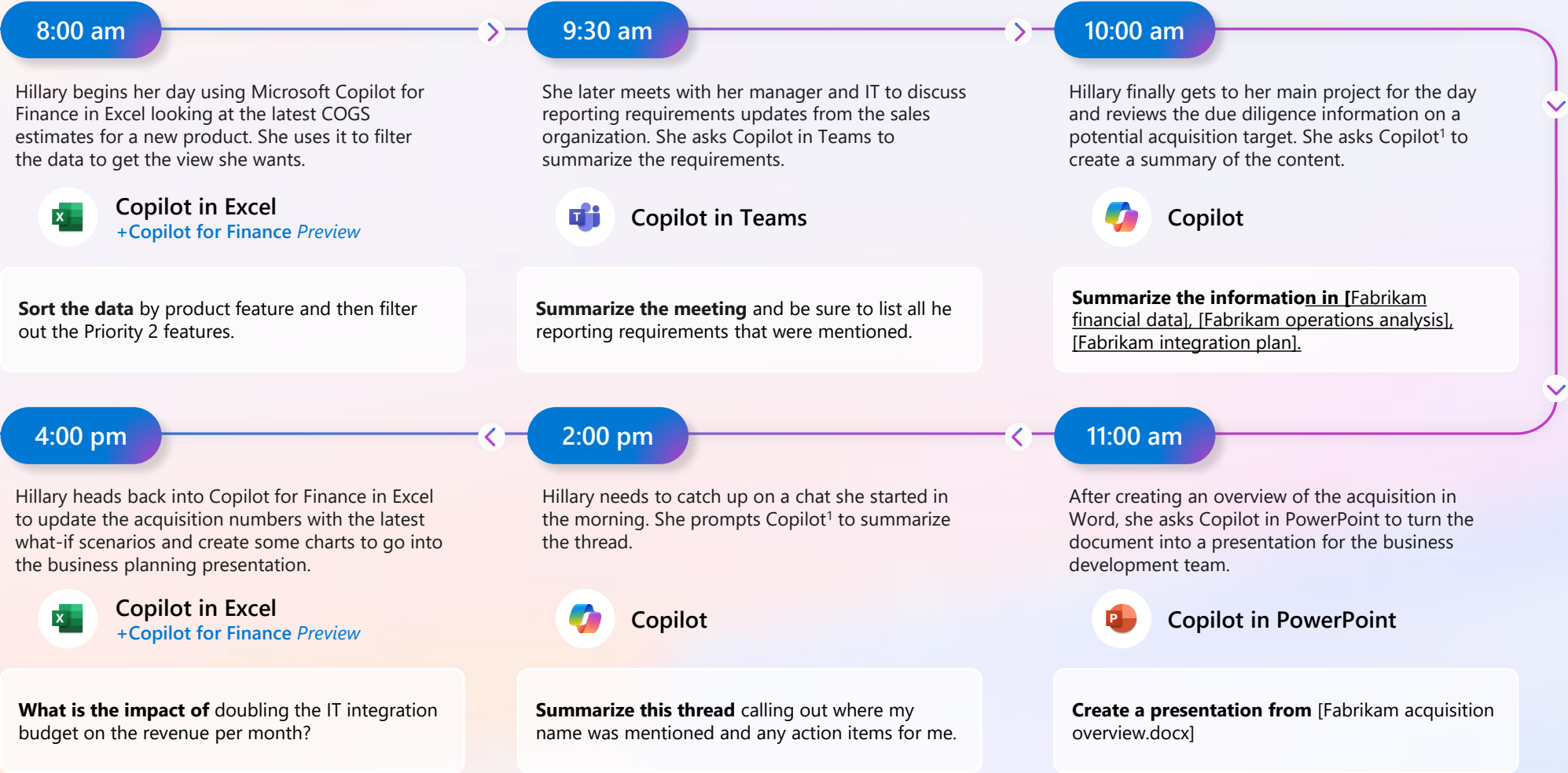
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A day in the life of a Financial Analyst

Available with:
Copilot for Finance (includes Copilot for Microsoft 365)

Scenario level:   

- Benefits
-  ~1 hour per week
-  Areas of investment: Learning
-  Handling more cases



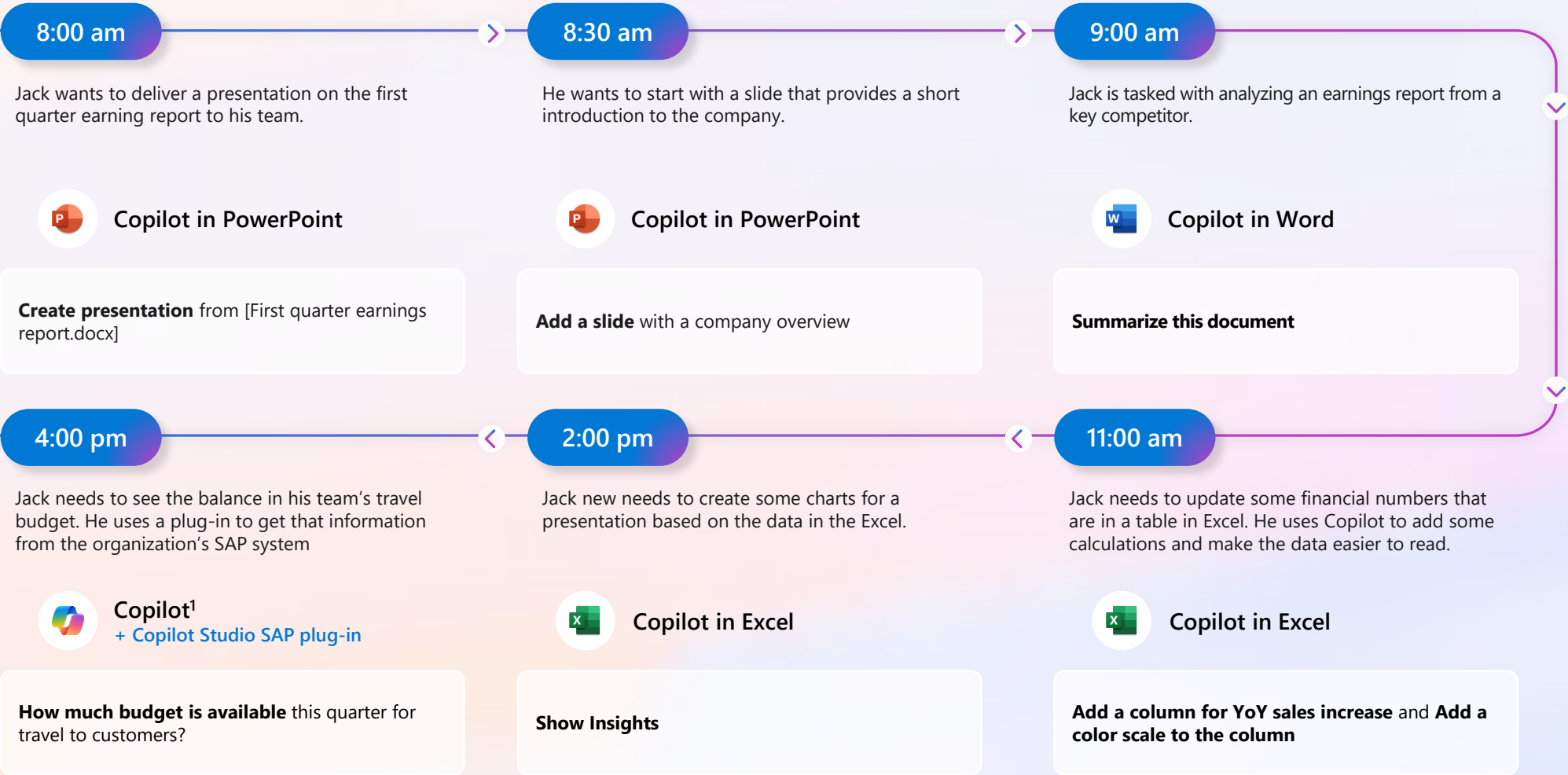
Hillary
is a Financial
Analyst at
Contoso



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A day in the life of a Finance Manager

- Benefits
-  ~1 hour per week
-  Areas of investment: Communications
-  Delivering quality analysis



Jack
is a Finance team
manager



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