

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 Al 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

Al is transforming crucial tasks in Finance such as budgeting, forecasting, financial analysis, and corporate performance management. Al 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









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

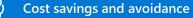
Copilot can be extended into ERP systems and other processes to bring data together and speed decision-making without performing expensive updates to financial systems.



Reduce functional spending

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







Improve employee experience



KPI – Days sales outstanding





Roles

Collection Managers

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.



Microsoft Al solutions

Copilot for Microsoft 365
Microsoft Copilot
Copilot for Finance in public preview

KPI – Reduce spend on financial systems and tooling



Roles

Financial Analysts

Executive Leadership

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



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

Financial Planner

Treasury Manager

Risk Manager

Controller

Data Managers

Strategic Planners



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 Al-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

Finance | Optimize your financial operations Copilot¹

Available with: Microsoft Copilot

Scenario level:

KPIs impacted

Reduce spending



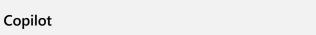
Value benefit

Cost savings

Employee experience

1. Automate workflows

Use Microsoft Copilot to write a python script to automate tedious tasks like data collection.



Prompt: Write a python script to mine data from various websites.

6. Due Diligence

Prompt Copilot to identify potential acquisition targets in specific geographies.



Copilot

Prompt: Provide a list of likely acquisition targets in the Retail industry in Asia and give the reasons why they are on the list.

2. Financial analysis

Save time by asking Copilot for ideas of how to perform complex financial analyses.



Copilot

Prompt: How should I structure a valuation of a retired manufacturing facility?

5. Communicate insights

Relay key insights to your audience by using Copilot to generate content like reports, investments summaries, financial briefs and more.



Copilot

Prompt: Generate an investment summary based on the annual report on this web site. Simplify the financial jargon and be sure to include information on key risks and performance metrics.

3. Stay up-to-date with news and trends

Make sure you're caught up with the latest industry news and trends by asking Copilot for a summary.



Copilot

Prompt: Generate a summary that provides insights into the current state of the steel industry based on recent financial news, stock market data, and economic indicators.

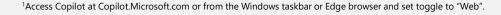
4. Gather competitor information

Prompt Copilot to compare product capabilities to perform an accurate Total Cost of Ownership analysis for a product pricing update.



Copilot

Prompt: Create a table comparing the capabilities of Product X and Product Y.







Value benefit





1. Define investment opportunity

Ask Microsoft Copilot¹ to create a project brief including data from emails, competitive research, and financial records pulled from Copilot Studio plugins.



Copilot

+Copilot Studio

Streamline the review process and quickly understand key issues to be addressed with the potential investment.

6. Test the business case

After the business case has been implemented for 6 months, use Copilot for Finance to conduct a variance analysis and capture project KPIs.



Copilot in Excel

+Copilot for Finance Preview

Speed analysis by using Copilot for Finance to accelerate variance analyses.

2. Gather project information

Meet with the business development team to learn about the various options available and gather financial information. Use Copilot in Teams to suggest questions and summarize the meeting.



Copilot in Teams

Ensure a productive meeting by using Copilot in Teams to suggest questions and clarify what people said. Use the recap for a summary and action items.

5. Produce summary report

Once the business case analysis is complete use Copilot in PowerPoint to turn the project brief into a set of slides for the executive presentation.



Copilot in PowerPoint

Reduce time by using Copilot in PowerPoint to revise content and organize the slides using Excel data.

3. Gather financial data

Analyze financial data with Copilot in Excel. Use Copilot for Finance to pull in ERP system insights to estimate past cost of sales and revenues by year and model potential growth based on project implementation.



Copilot in Excel

+Copilot for Finance Preview

Eliminate time spent searching for data and information from across complex systems.

4. Produce forecast trends

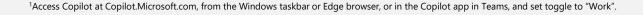
Prompt Copilot¹ to get the latest sales forecasts from your email. Use Copilot in Excel to organize the information and produce trend charts.





Copilot in Excel

Collaborate effectively across teams and functions (e.g., legal, transportation) in a secure way. Use data for decision making in meetings and discussion.





Value benefit





1. Surface outstanding invoices

Use Microsoft Copilot to summarize recent email threads with customers. Use Copilot for Finance in Outlook to identify outstanding invoices and related insights pulled directly from your ERP system.



Copilot in Outlook

+Copilot for Finance Preview

Speed analysis and streamline customer communications by connecting your ERP and financial system data.

2. Build call script

Prompt Copilot¹ to generate a call script. Use Copilot in Word to refine the call script and save as a template to be used again.



Copilot



Copilot in Word

Build conversation script, suggesting the most effective and policy compliant approach to collect outstanding invoices and negotiate payment terms.

3. Call customers

Call customers who have outstanding balances, using Copilot in Teams to take meeting notes.



Copilot in Teams

Simplify capture of customer intent with generated call notes.

6. Update legal team

Draft a summary of the collections cycle for the legal team. Draft the message with Copilot in Word, including references to associated documents and emails.



Copilot in Word

Quickly find and summarize documents related to a customer.

5. Update financial data

Prompt Copilot² to summarize recent payment updates from email. Use Copilot for Finance to update your ERP system directly from Outlook with the latest payment plans and promise to pay dates.



Copilot



Copilot in Outlook +Copilot for Finance Preview

Simplify record updates by updating ERP records from directly within Outlook.

4. Send payment reminders

Use Copilot in Outlook to draft follow up emails to customers. With Copilot for Finance, view and attach related records and financial insight directly within Outlook.



Copilot in Outlook

+Copilot for Finance Preview

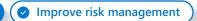
Automate drafting of emails and use Copilot to review the tone and customize emails with relevant records and insight.

¹Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web".

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Finance | Accounting document evaluation

KPIs impacted



Value benefit

Cost savings

1. Summarize requirements

Pull and reference the most recent U.S. GAAP changes related to cloud computing.



Copilot in Teams

"Draft with Copilot" to send an email to your manager outlining my key updates and next steps while ensuring it is concise.

6. Draft an email

Update the document with the recommended changes and summarize the revised content.



Copilot in Outlook

Summarize the latest U.S. GAAP updates related to cloud computing costs.

2. Gather information

Locate the relevant document that needs updating and search for additional mentions of the document.



Copilot1

Generate a bulleted list that summarizes the updated section in [document.docx] about cloud computing.

5. Summarize updates

Identify sections of the document to be updated based on the latest accounting guidance



Copilot in Word

Locate the MS Word document titled "document" created by the accounting team last year.

3. Discover documents

Recap this meeting and provide the key points and action items.



Copilot²

Suggest updates to [Document.docx] based on U.S. GAAP ASU 1234-56 Subtopic 123-45.

4. Generate updates

Confirm necessary steps and action items from an earlier meeting with your manager where they outlined their request to update a document based on new accounting guidance.

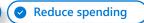


Copilot²

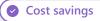
After making the document updates, send an e to your manager outlining the key changes to document and articulating your request for her review by end of the week.

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Value benefit





1. Summarize requirements

Catch up on a missed meeting where a new financial work tool was demoed to the department.



Copilot in Teams

Recap this meeting and review the main topics discussed.

6. Draft an email

2. Gather information

Identify all documents associated with the new financial tool and summarize the relevant documents to be used in a self-serve training presentation.



Copilot²

Summarize the relevant documents and topics associated with the new tool.

5. Generate a training presentation

Solicit feedback from a small group of users to refine the training presentation.



Copilot in Outlook

Drafting with Copilot: draft an email notifying users of the new training content and ask them for feedback by the end of the week.

Turn the Microsoft Word document into a great training presentation including relevant

visualizations and images.



Copilot in Word

Create a presentation from [tooltraining.docx]. Then, add an image of the process to illustrate the workflow.

3. Discover documents

Generate a training outline and draft content associated with the tool documentation.



Copilot²

Draft a training document for the specified audience that covers topics associated with user onboarding and adoption.

4. Brainstorm FAQs

Create a FAQ section to address potential blockers and common issues a new user may encounter. Add this to the MS Word document.



Copilot²

Brainstorm frequently asked questions for a new financial work tool.

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Available with:

Copilot for Microsoft 365

Scenario level:

KPIs impacted





Value benefit



terms/conditions.

Employee experience

1. Find the asks in your emails

Review email discussions regarding the latest Contoso deal to prepare for a consultation with an internal deal stakeholder.



Copilot in Outlook

Catch me up on the emails about the Contoso deals. Summarize the latest requests.

6. Create an email with a response

Copilot in Teams

Summarize this meeting and provide the key points and action items.

5. Prep for a meeting

Gain alignment with the stakeholders on the recommended accounting guidance for structuring the customer deal.



Copilot²

Create a meeting agenda based on the latest contract review meeting and email with the objective of aligning on the accounting recommendations for the deal.

2. Recap a meeting

Catch up on the last meeting with the stakeholder to ensure clarity on their latest requests.

4. Collaborate with team

3. Summarize the contract

Review the new contract and summarize the deal

Copilot in Word

Ask Copilot a series of prompts: "What is the

commitment and monthly fee?", "What are the

T&Cs for invoicing?", "What is the license term?"

and associated revenue impacting

Solicit input and finalize with team on the technical accounting guidance for the draft customer agreement.



Copilot in Loop

Generate a space for team members to dynamically contribute and ideate on deal structure recommendations. "Create a list of topics to discuss for a contract review."



agreement updates.

Copilot in Outlook

Reply to the stakeholder with a concise but

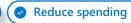
thorough summary of the recommended

"Draft with Copilot" a reply with a bulleted list of the team's recommendations, associated rationale, and next steps. Tone is Formal and Length is Short.

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Finance | Contract accounting guidance

KPIs impacted





Value benefit





1. Gather information

Ask Copilot to gather information about the customer to better understand the contract.



Copilot²

Pull together a summary of the customer interactions from recent email and chats

6. Create an email with a response

Send an email to my manager summarizing our key recommendations.



Copilot in Outlook

Use **Coaching by Copilot** to enhance and provide clarity to my email.

2. Create a brief

Copy the data collected along with a recent meeting summary into Word and then have Copilot organize the content.



Copilot in Word

Rewrite the brief to outline the key scenario based on the background and supporting details.

5. Prep for a meeting

Create a Microsoft PowerPoint presentation with the finalized accounting guidance for the customer scenario.



Copilot in PowerPoint

Create a presentation from file [scenario.docx] that summarizes the team's recommendations.

3. Summarize the contract

Establish a starting point for the accounting team with relevant accounting considerations and perspective based on the customer scenario.



Copilot1

Provide accounting guidance and recommendations for the customer scenario in the [scenario.docx]

4. Collaborate with team

Use Microsoft Loop to collaborate with colleagues to build on the preliminary list of accounting considerations.



Copilot in Loop

Brainstorm additional accounting consideration for the customer scenario.

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Value benefit





1. Summarize policy updates

You have a high priority request to review the latest U.S. GAAP updates for the past quarter to determine which amendments may need review.



Copilot1

Summarize all U.S. GAAP updates from the last 3 months.

2. Conduct comparison

Evaluate and compare the two amendments associated with the recent U.S. GAAP updates.



Copilot²

Compare [standardamendment.docx] and [customamendment.docx] **and put the results into a table.**

3. Collaborate efficiently

Use Microsoft Word to display the table of comparisons and your recommended changes. Add a summary paragraph explaining the objective and recommendations.



Copilot in Word

Rewrite with Copilot to summarize the key differences between the documents in one paragraph.

5. Share learnings broadly

Share methodology and learnings with new hires to the team to accelerate their onboarding.



Copilot in PowerPoint

Outline your approach and steps on a PowerPoint slide. **Create a presentation about** your approach.

4. Solicit feedback

Request your colleague review the Microsoft Word document of comparisons.



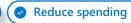
Copilot in Outlook

Draft with Copilot an email to a colleague requesting their edits and comments in comparison.doc by the end of the week



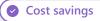
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Value benefit



Employee experience

1. Recap a meeting

Catch up on the key discussion points, decisions, and action items from a missed meeting.



Copilot in Teams

Summarize this meeting and provide the key points and action items.

Based on an action item from your missed meeting, compare multiple contracts for changes and provide considerations and recommendations based on the scenario.

2. Evaluate contracts



Copilot²

Evaluate [contract1.docx] and [contract2.docx]. As a [finance ops manager], create a comparison table outlining the key differences and risks.

3. Summarize comparisons

Synthesize the contract comparisons and generate summaries and insights.



Copilot in Word

Summarize this document [summary.docx] into 5 key takeaways in paragraph form.

6. Communicate recommendations

Send an email to colleagues soliciting feedback on the presentation. Include the Loop for more efficient collaboration.



Copilot in Outlook

Use **Coaching by Copilot** to enhance the tone of your email while conveying urgency in your request. Tone is Direct and Length is Short.

5. Collaborate with team

Brainstorm with colleagues on the draft presentation to incorporate diverse perspective.



Copilot in Loop

Create a space for team members to contribute ideas for the presentation. Start with a list of topics and details from [summary.docx]. "Summarize page" so team members can get a guick recap.

4. Generate a presentation

Create a presentation that summarizes the key takeaways and includes recommendations based on the identified risks.



Copilot in PowerPoint

Create a presentation from file

[summary.docx] and include the team's recommendations.

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Value benefit



Employee experience

1. Get meeting insights

Review meeting details to determine the changes to be made in the RFx document.

2. Ask questions

Locate the latest RFx document that needs updating based on the stakeholder request.

3. Analyze financial impact

Adjust your financial model to confirm the expected change in costs and review where it exceeds your thresh hold.



Copilot in Teams

In Meeting Recap, review meeting **#Topics** to quickly locate the relevant details for your document updates.



Copilot²

Locate the latest RFx document created by your team in the last week.



Copilot in Excel

Highlight the cells yellow where the "adjusted expected spend" exceeds \$10,000.

5. Request feedback

Draft and send an email to your stakeholder summarizing the changes.

4. Efficient document updates

Rewrite the relevant document sections that need updating based on the new RFx information.



Copilot in Outlook

Use **Coaching by Copilot:** write an email to my stakeholder outlining the updates, gain alignment, and offer a meeting to discuss.



Copilot in Word

Summarize the updated sections into a few bullet points. This will be added with your Microsoft Excel chart in an email to the stakeholder.



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A day in the life of an Income Tax Compliance Manager

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 deprecation 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 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 Al 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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Copilot for Microsoft 365 and Al Builder

Scenario level:

Build

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

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 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.

I have today; including action items from the

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





A day in the life of a Vendor Engagement Manager

Benefits

~1 hour per week

Areas of investment: Vendor meetings

★ Vendor evaluations

8:00 am

Kim has several new emails from vendor companies and internal teams. Instead of reading through each email, he uses Microsoft Copilot¹ to summarize recent emails.



Copilot

Summarize this thread.

9:30 am

Kim uses Copilot for Finance in Excel to analyze a vendor's compliance data.



Copilot in Excel

+Copilot for Finance Preview

Suggest formulas for this column. Show insights in charts.

10:00 am

During a meeting with the vendor, Kim uses Copilot in Teams to keep track of the discussion. After the meeting, Copilot helps identify next steps



Copilot in Teams

Summarize key discussion points. Identify agreed-upon next steps.

4:00 pm

Kim uses Copilot¹ to manage his tasks. He create a meeting agenda based on this chat history to prepare for his meetings.



Copilot

Create a meeting agenda based on this chat history.

2:00 pm

Kim needs to create a presentation for a potential vendor. He uses Copilot in PowerPoint to create a new presentation from this Word file and improve the layout of his slides



Copilot in PowerPoint

Create a new presentation from this Word file. Change the layout of this slide.

11:00 am

Kim uses Copilot in Word to draft a report, prompting it to bring in specific information from other documents. He also uses Copilot in Word to improve the clarity of his report.



Copilot in Word

Draft content from these documents. Suggest ways to rewrite this content.

Kim
is a Vendor
Engagement
Manager in
Finance





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Benefits



~1 hour per week

Areas of investment: Learning



★ Handling more cases

8:00 am

Hillary begins her day using Microsoft Copilot for Finance in Excel looking at the latest COGS estimates for a new product. She uses it to filter the data to get the view she wants.



Copilot in Excel

+Copilot for Finance Preview

Sort the data by product feature and then filter out the Priority 2 features.

9:30 am

She later meets with her manager and IT to discuss reporting requirements updates from the sales organization. She asks Copilot in Teams to summarize the requirements.



Copilot in Teams

Summarize the meeting and be sure to list all he reporting requirements that were mentioned.

10:00 am

Hillary finally gets to her main project for the day and reviews the due diligence information on a potential acquisition target. She asks Copilot¹ to create a summary of the content.



Copilot

Summarize the information in [Fabrikam financial data], [Fabrikam operations analysis], [Fabrikam integration plan].

4:00 pm

Hillary heads back into Copilot for Finance in Excel to update the acquisition numbers with the latest what-if scenarios and create some charts to go into the business planning presentation.



Copilot in Excel

+Copilot for Finance Preview

What is the impact of doubling the IT integration budget on the revenue per month?

2:00 pm

Hillary needs to catch up on a chat she started in the morning. She prompts Copilot¹ to summarize the thread.



Copilot

Summarize this thread calling out where my name was mentioned and any action items for me.

11:00 am

After creating an overview of the acquisition in Word, she asks Copilot in PowerPoint to turn the document into a presentation for the business development team.



Copilot in PowerPoint

Create a presentation from [Fabrikam acquisition overview.docx1

Hillary is a Financial Analyst at Contoso





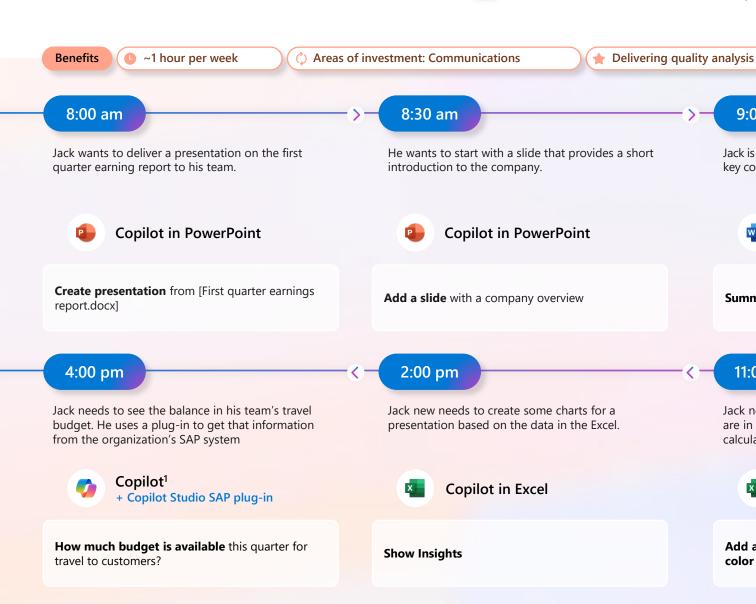
Access Copilot at Copilot.Microsoft.com, from the Windows taskbar or Edge browser, or in the Copilot app in Teams, and set toggle to "Work".

Copilot for Microsoft 365 (with Copilot Studio plug-ins)

Scenario level:

Customize





9:00 am

Jack is tasked with analyzing an earnings report from a key competitor.



Copilot in Word

Summarize this document

11:00 am

Jack needs to update some financial numbers that are in a table in Excel. He uses Copilot to add some calculations and make the data easier to read.



Copilot in Excel

Add a column for YoY sales increase and Add a color scale to the column







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To schedule a Copilot workshop contact:

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