Copilot In Action

Discover industry- and role- based scenarios

Copilot brings AI value across Departmental KPIs

Executive
- Improve meetings
- Content creation
- Manage daily agenda
- Summarize information
- Generate ideas

HR
- Cost per hire
- Employee turnover
- Compliance risk reduction
- Benefit usage
- Onboarding time

Marketing
- Leads created
- Brand value
- Cost per lead

Finance
- Days sales outstanding
- Spend on ERP system
- Risk reduction
- Departmental spending

Sales
- Number of opportunities
- Close rate
- Revenue per sale
- Customer retention

IT
- Outstanding support tickets
- Application downtime
- Departmental spending

Operations
- Customer retention | Product time to market | Supply chain efficiencies

Copilot scenarios for
Executives

Copilot scenarios for
Executives

Overview and KPIs

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

Use Case by Role

Copilot can simplify the tasks that execs 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 executives are using Copilot in their day to day.

Use case | Prepare for a company-wide address

1. Gather key points

Quickly catch up on the latest developments and discussions related to the announcement by summarizing email threads and chat conversations.

Microsoft Copilot

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify key pain points for customer.

2. Rally the Team

Meet with the executive team to review each business unit's results. When closing the meeting ask Copilot to create action items from the conversation and assign owners.

Copilot in Teams

Document and socialize the action items to keep the preparation process moving forward towards a successful close.

3. Draft the speech

Revise the draft of the speech, asking Copilot to make it resonate more with the workers at the speech location.

Copilot in Word

Create a draft of your speech from your current documents.

6. Send thank you

Thank the team for watching the address by asking Copilot to draft a response that can be personalized in tone and length, even on the go.

Copilot in Outlook

Create recap in record time by relying on Copilot in Outlook to draft the message along with your notes from the Teams recording recap.

5. Review previous session

Review last quarter's address by glancing over the meeting recap and asking Copilot about the numbers that were presented to ensure consistency.

Copilot in Teams

Avoid listening to meeting recordings and instead rely on recap. Freeing up more time to focus on the speech at hand.

4. Create presentation

Revise the presentation slides changing out a few images with suggestions from Copilot.

Copilot in PowerPoint

Create presentation from your speech document to present at the meeting about the new offer and product that's coming to market.

A day in the life of an Executive

7:00 am

Tanya starts the day with a customer call in her hotel room. She uses Copilot to monitor for any disagreements.

Copilot in Teams
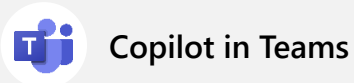
What are some good follow up questions to make sure I understand the customer's issue with the last delivery?

8:30 am

After the call, Tanya summarizes her email threads from the day before and uses Copilot to create replies getting through all of her email in only 20 minutes.

Copilot in Outlook

Reply in a professional tone with a short email saying that I am sorry for the issue with the product and we will have a response by 3 pm this afternoon.

9:00 am

Tanya has a few more minutes so she uses Copilot to catch up on the meetings she missed while flying in. She sends a few chats to provide instructions on the critical issues.

Copilot in Teams

What was the main issue faced by the customer and what was the proposed solution and timing?

7:00 pm

The issue is finally under control and Tanya can get back to her speech. She isn't happy with the introduction, so she asks Copilot to suggest some humorous opening lines for her speech.
With a few tweaks she has the perfect start.

Copilot in Word

Give me some suggestions of humorous ways to begin this speech.

3:00 pm

A critical production issue has occurred, and Tanya needs to get up to speed quickly. She asks Copilot for a summary of the emails and chats related to the issue.
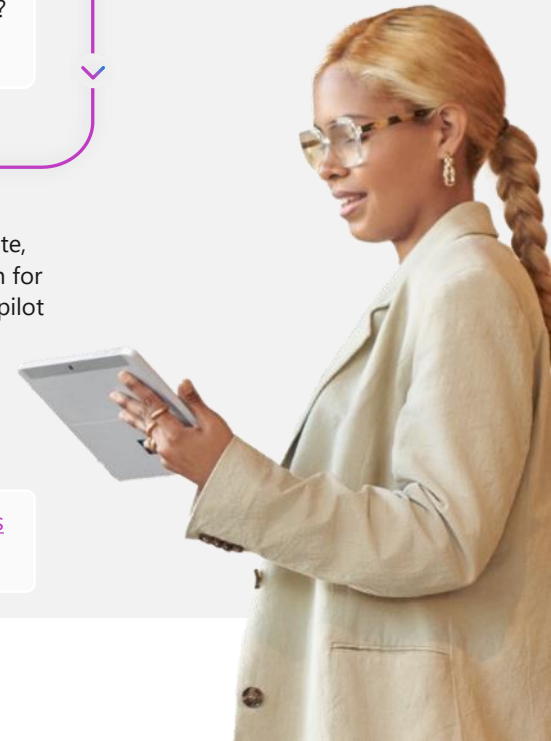
Copilot

Summarize all of the email and chats that mention the melt shop from the past two hours.

2:00 pm

After a long session of meetings at a customer site, Tanya gets a chance to have a look at her speech for tomorrow and make a few updates. She uses Copilot to add a new section on bonus plan updates.

Copilot in Word
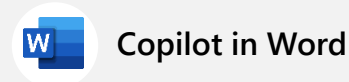
Add a new paragraph based on Contoso Bonus Plan for FY23.

Tanya
leads a product marketing team

A day in the life of an Executive

7:30 am

Omer starts his day by reviewing his calendar and preparing for his meetings. He uses Copilot to surface recent activity with his reports to prepare for his 1:1s.

Copilot

What's the latest from (tag name) organized by emails, chat, and files

9:30 am

Omer starts his back-to-back 1:1s feeling prepared. He uses Copilot in Loop as the landing place for notes and action items. His directs can easily draft "lite" project plans with Copilot in Loop.

**Copilot in Loop
Copilot in Teams**

Collaborate, co-create, and stay in sync with Loop.

11:00 am

Omer has a short working block to prepare for his Leadership Team meeting. He uses Copilot in Word to draft talking points for the meeting.

Copilot in Word

Draft talking points for a meeting and reference these files.

Omer

is the Director of Sales at Health Solutions Company

2:00 pm

With a day full of meetings, Omer is feeling behind on email. He used Copilot in Outlook to surface key updates.

Copilot in Outlook
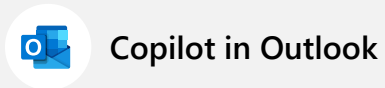
Generate a summary to transform long email conversations into short summaries

1:00 pm

Omer forwards the Word doc to a member of his team and asks them to use Copilot in PowerPoint to create a deck for tomorrow's meeting.

Copilot in PowerPoint

Summarize all of the email and chats that mention the melt shop from the past two hours.

11:10 am

While preparing his talking points for the leadership team meeting, Omer needs to review the most recent employee sentiment survey results. He grabs responses from Microsoft Forms and has Copilot in Word provide a summary for each member of the team.

Copilot in Word

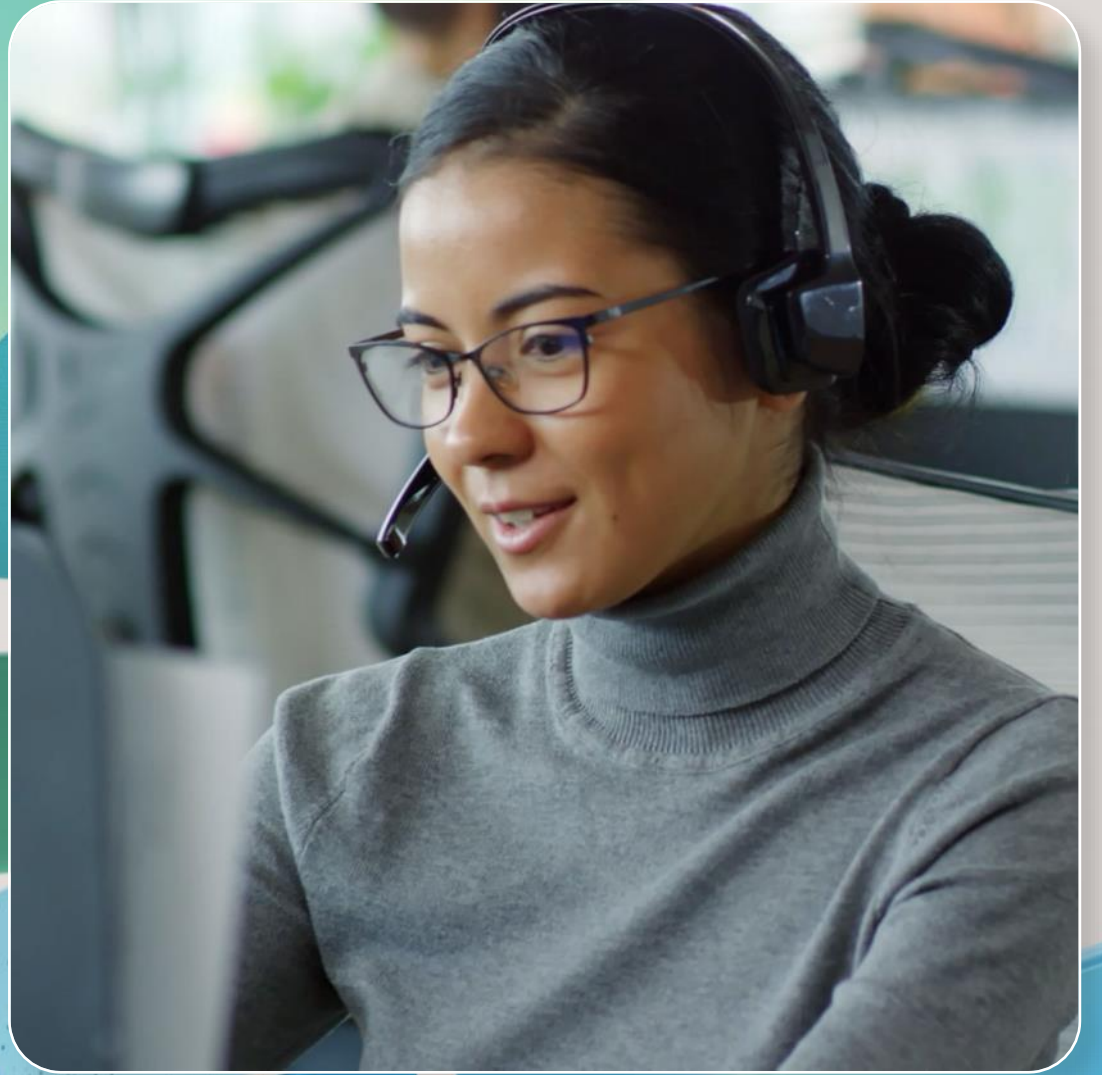**Summarize** document and highlight themes.

Copilot scenarios for
Sales

Copilot scenarios for
Sales

Overview and KPIs

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

Use Case by Role

Copilot can simplify the tasks that execs 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 sellers are using Copilot in their day to day.

Using Copilot in Sales

Goals and challenges

Based on Microsoft research selling is getting harder with 79% of sellers saying they need to support more account and are spending 70% of their time on administrative tasks such as research, planning, generating proposals, data entry, and internal meetings.

Copilot can assist with...

Copilot assists sales teams with tedious tasks like catching up on pipeline, updating CRM data, preparing for meetings, and analyzing calls so they can focus on closing the deal. Improve lead quality

- Improve customer meetings
- Make a pitch
- Improve time to respond to an RFP or produce a quote
- Create an unsolicited proposal
- Respond to a customer complaint

Sales roles

- Account manager
- Technical sales
- Telesales
- Customer Success

Microsoft Copilot opportunity to impact key departmental KPIs

Number of opportunities pursued
Simplifying and automating tasks like preparing for meetings, tracking tasks. sending emails, creating proposals, and researching customer and product information can allow sellers to pursue more opportunities. Research shows an increase of 0.4-0.5% in opportunities.[1]

Improve close rate
Improving the customer of marketing content and customer interactions such and emails and meetings can help to improve close rates. In addition, improving targeting, pricing analysis, and creating effective promotions can also improve close rate.

Increase revenue per sale
Copilot helps expand opportunities through cross selling. Sellers can use Copilot to get suggestions for cross selling opportunities and then research a better together story. Copilot also assists in pulling together quotes and proposals. Research shows a 2.5-3.1% increase in upsell or cross-sell.[1]

Increase customer retention
Improving the quality of sales materials and interactions helps with retention, But the rest of the company can contribute as well from improved support interactions and first call resolution to improved customer feedback processes to product development. Research shows a 0.8-1% increase in revenue from improved retention.[1]

Note, sales efficiency and sale effectiveness benefits are non-exhaustive. [1]Percentage improvements were calculated based on a sample set of Copilot for Sales customer deployments, third-party analyst reports from Boston Consulting Group, Bain & Company, and McKinsey, and Microsoft's internal business value management database.

Accelerate growth   Cost savings and avoidance   Employee retention

KPI – Increase number of opportunities pursued

Sales is about building relationships and pursuing opportunities. But these things take time and so anything that Copilot can do to reduce the time salespeople spend on tasks can be used to increase customer face time and pursue more deals.

How Copilot can help increase the number of opportunities pursued

Improve customer meetings

- Use Copilot to organize information from past interactions
- Research company information
- Learn how to pitch the product
- Completely focus during the meeting

Respond to an RFP

- Use Copilot to gather proposal information
- Have Copilot assist with emails
- Create a bot with RFP responses

Roles

Pursuing more opportunities can require input from:

- Account Manager
- Technical Sales
- Training staff
- Product teams
- Customer Success

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

KPI – Improve close rate

Closing a deal often requires bringing many elements together from an entire team to ensure that both the customer and seller are satisfied.

How Copilot can help improve the close rate

Improve quality of customer-facing materials

- Improve marketing content
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Create pricing and promotions

- Use Copilot to research market conditions
- Use Copilot to compare sales across regions or other variables

Improve targeting

- Analyze current product mix and cross sell success

Improve customer meetings

- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications

Roles

Improving close rates can require input from:

- Account Manager
- Technical Sales
- Training staff
- Product teams
- Product Marketing
- Finance

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

KPI – Impact on revenue per sale

Revenue achieved per sale can have many factors, but the most common way to increase it would be through cross selling to include more items in the sale.

Use cases

Improve quality of customer-facing materials
- Improve marketing content with clear value propositions
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Create a proposal
- Improve product training content
- Use Copilot to compare sales across regions or other variables

Improve targeting
- Analyze current product mix and cross sell success

Improve customer meetings
- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications

Roles

Increasing revenue per sale can require input from:

- Account Manager
- Technical Sales
- Training staff
- Product teams
- Product Marketing
- Finance

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

KPI – Impact on customer retention

Keeping customers happy after a sale is a team effort. The efforts by the customer success team and product team to resolve any issues in a timely manner are critical. Follow up by the sales team is helpful and can lead to additional sales.

Use cases

Improve quality of customer-facing materials
- Improve marketing content with clear value propositions
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Improve customer meetings
- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications

Respond to a customer complaint
- Respond quickly
- Access customer records
- Gets answer fast

Roles

Customer retention can require input from:

- Account Manager
- Technical Sales
- Product support
- Product teams
- Customer Success

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

Sales use case | Improve customer meetings

Potential benefits   (Improve close rate)   (Increase customer retention)   (Increase revenue per sale)

1. Prepare for a meeting

Summarize recent customer communications across emails, chats, and documents with Copilot Studio's connection to your CRM. Then create a customer meeting brief using Copilot for Sales.

**Copilot Studio
Copilot for Sales**

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify cross sell opportunities.

2. Create a presentation

Use Copilot to generate a presentation for the meeting using branded templates. Copilot can suggest important topics, customer requests, and organize slides into a logical flow.

Copilot in PowerPoint

Using higher quality presentations makes it easier to convey a clear message and can reduce the time to close the deal.

3. Stay focused during the call

Since Copilot is listening in there is no need to take notes and keep track of action items. Stay focused on the call and have a better discussion.

Copilot in Teams

Having a better discussion during the call can help to raise and resolve issues quicker, leading to increased customer satisfaction and potentially reduce the time to close the deal.

6. Send a follow up email

Have Copilot turn the meeting notes and action items into an email for all participants.

Copilot in Outlook

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Summarize the meeting

After the meeting is over review the meeting recap for a summary of key points and action items. Update the opportunity details in the CRM system.

**Copilot in Teams
Copilot for Sales**

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Ask Copilot to suggest next steps

During the meeting you can ask Copilot for suggestions on questions to ask or next steps to discuss to keep the conversation on track.

Copilot in Teams

Keep the conversation flowing onto meaningful topics can help to cover the agenda quicker and reduce meeting times.

Sales use case | Make a pitch

Potential benefits (Improve close rate) (Increase customer retention) (Increase revenue per sale)

1. Refine discovery session

Work with the sales team to refine the customer discovery session goals and components using Copilot in Loop.

Copilot in Loop

Collaborate as a team using Copilot as a key contributor of creative ideas.

2. Research the company

Discover information on the customer using Microsoft Copilot to summarize their Annual Report for goals, risks, and financial information.

Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time.

3. Find the asks in your emails

Create a bulleted list of notes using recent email threads before the meeting with the customer to understand the asks that need to be addressed.

Copilot

Save time searching for information in chats and emails and get a more complete picture than you may have if you quickly scanned the threads.
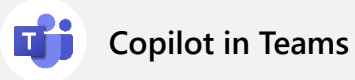
6. Create the proposal

Draft the final proposal using Copilot to take content from your emails, meeting notes, and presentations.

Copilot in Word

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Summarize the meeting

After the meeting is over review the meeting recap for a summary of key points and action items.

Copilot in Teams

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Update the sales presentation

Refine a sales presentation with a new slide using customer details from the email summary and visuals relevant to their industry.

Copilot in PowerPoint

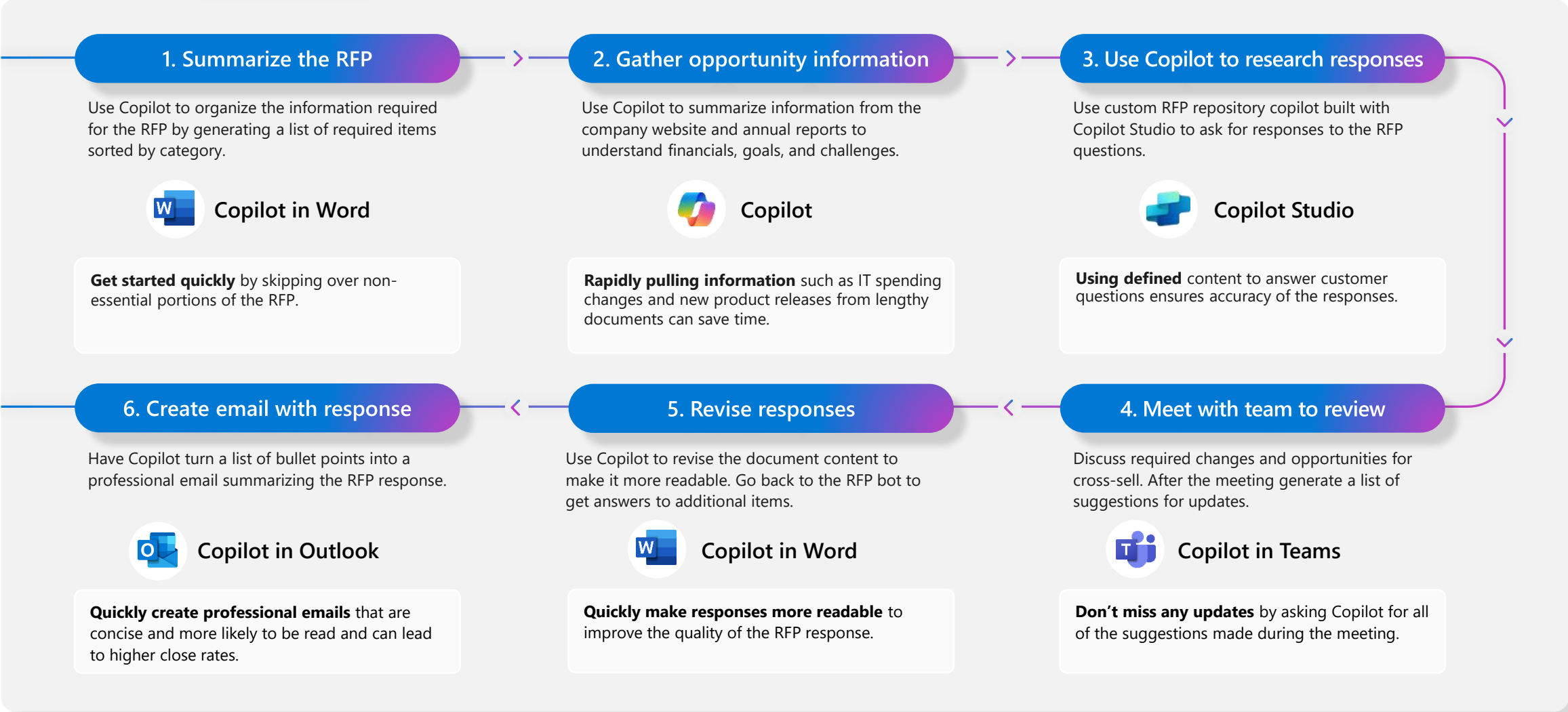**Quickly personalize pitch presentations** with talking points and data specific to your customer.

Sales use case | Respond to a RFP

Potential benefits Improve close rate   Number of opportunities   Increase revenue per sale

1. Summarize the RFP

Use Copilot to organize the information required for the RFP by generating a list of required items sorted by category.

Copilot in Word

Get started quickly by skipping over non-essential portions of the RFP.

2. Gather opportunity information

Use Copilot to summarize information from the company website and annual reports to understand financials, goals, and challenges.

Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time.

3. Use Copilot to research responses

Use custom RFP repository copilot built with Copilot Studio to ask for responses to the RFP questions.

Copilot Studio

Using defined content to answer customer questions ensures accuracy of the responses.

6. Create email with response

Have Copilot turn a list of bullet points into a professional email summarizing the RFP response.

Copilot in Outlook

Quickly create professional emails that are concise and more likely to be read and can lead to higher close rates.

5. Revise responses

Use Copilot to revise the document content to make it more readable. Go back to the RFP bot to get answers to additional items.

Copilot in Word

Quickly make responses more readable to improve the quality of the RFP response.

4. Meet with team to review

Discuss required changes and opportunities for cross-sell. After the meeting generate a list of suggestions for updates.

Copilot in Teams

Don't miss any updates by asking Copilot for all of the suggestions made during the meeting.

Sales use case | Create an unsolicited proposal

Potential benefits (Improve close rate) (Increase number of opportunities pursued) (Increase revenue per sale)

1. Get targeting information

Easily access CRM information to pull current licensing and targeting recommendations.

Copilot for Sales

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify cross sell opportunities.

2. Perform company research

Use Copilot to summarize information from the company website and annual reports to understand financials, goals, and challenges.

Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time and helps to target the proposal.

3. Gather product information

Ask Copilot to gather production information and create a summary of how they will help to meet the customer's specific goals.

Copilot

Gathering product information from multiple sources and asking Copilot to prepare a summary can save time and increase accuracy

6. Create email with proposal

Have Copilot turn the meeting notes and action items into an email for all participants.

Copilot in Outlook

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Meet to review

Ask Copilot to review chat and emails about the proposal and create an agenda. Use Copilot during the meeting to highlight disagreements and then create a set of action items after the meeting.

Copilot in Teams

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Generate the proposal

Use Copilot to turn the information you have collected into a great presentation including images and tables.

Copilot in PowerPoint

Generating a first draft quickly so you can append more time on the details.

Sales use case | Respond to a customer complaint

Potential benefits   (Improve close rate)   (Number of opportunities)   (Increase revenue per sale)

1. Summarize customer emails

Combine recent customer communications across emails, chats, and documents with deal information from CRM systems to create a customer brief in Word.

Copilot for Sales

Rapidly get up to speed to on the concern raised across all of the communications you have received.

2. Research product info

Ask Copilot to gather product information and create a summary of if this issue has been seen before and how it might be addressed.

Copilot

Gathering product information from multiple sources and asking Copilot to prepare a summary can save time and increase accuracy.

3. Meet with product team

Ask Copilot to suggest questions to ask the product team based on the customer request and potential solutions.

Copilot in Teams

Copilot can help boost creativity by suggesting solutions from its vast knowledge base.

6. Meet with the customer

Have Copilot turn the meeting notes and action items into an email for all participants.

Copilot in Teams

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Create email with response

Have Copilot create an email summarizing the presentation and highlighting how the issues will be resolved.

Copilot in Outlook

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Draft proposed response

Use Copilot to turn the information you have collected into a great presentation including images and tables.

Copilot in PowerPoint

Create a **draft presentation** directly from the meeting recap.

A day in the life of a service agent

8:00 am

Ethan, an agent at Fourth Coffee, receives an email from his customer Joanna about extending her coffee machine's warranty. Ethan uses Copilot for Service to generate a case summary.

Copilot in Outlook
Copilot for Service

Generates a case summary in Outlook that includes details from Salesforce and other knowledge sources to help Ethan get up to speed.

8:15 am

Now, one of Joanne's coffee machines is making a strange noise. Ethan uses Copilot for Service to quickly draft a reply in Outlook pulling in the case details from the CRM. He adds an invitation to a Teams call so he can help diagnose the issue.

Copilot in Outlook

Draft a reply in Outlook in the case details from the CRM. He adds an invitation to a Teams call so he can help diagnose the issue.

9:00 am

Ethan uses Copilot for Service to draft an email response to Joanna. Copilot analyzes CRM data, internal knowledge, and historical cases to generate the personalized reply about the warranty, which Ethan then reviews and sends.

Copilot in Outlook
Copilot for Service

Copilot analyzes CRM data, internal knowledge, and historical cases to generate the personalized reply.

4:00 pm

After ending the call with Joanna, he uses Copilot for Service to summarize the meeting and adds the summary to her Salesforce contact record directly from Teams.

Copilot in Teams
Copilot for Service

Summarize the meeting and adds the summary to her Salesforce contact record directly from Teams.

2:00 pm

A few minutes later, Ethan receives a live chat inquiry in Salesforce from another customer asking about a sales promotion. He uses Copilot for Service to get a concise summary of the promotion from ServiceNow and craft a response.

Copilot for Service

Get a **concise summary** of the promotion from ServiceNow and craft a response.

11:00 am

Ethan gets a quick reminder of the case details directly in Teams before joining the meeting. On the call, Ethan learns more about the noise, and uses Copilot for Service in Teams to identify and suggest a fix, which he then communicates to Joanna on the call.

Copilot in Teams

Uses Copilot for Service in Teams to identify and suggest a fix, which he then communicates to Joanna on the call.

Ethan
is a customer service agent

Copilot in Account Management

Customer need
- Help Account Managers work efficiently to close deals quickly and manage more accounts

Employee prompts
- **Summarize my communications** with Contoso and list any questions raised and any action items.
- **Draft an email** to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

Benefits
- Increase number of opportunities pursued
- Improve close rate
- Increase revenue per sale

Microsoft products
- Copilot for Microsoft 365
- Copilot for Sales
- Copilot in Dynamics 365 for Sales

Account Management strategic priorities
- Efficient account planning
- Understand customers goals and challenges
- Prioritize opportunities
- Reduce time to close

A day in the life of an Account Manager

8:00 am

Cassandra needs to prepare for her big pitch to Contoso so she summarizes the emails and chats from her main client.

Copilot

Summarize all the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

8:15 am

Cassandra commands Copilot to create a message to confirm the meeting.

Copilot in Outlook

Draft an email to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 am

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot to create some amazing charts to showcase the value of the offer.

Copilot in Excel

Show all data insights.

Cassandra
is a sales lead at Contoso

4:00 pm

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and commands Copilot to summarize the conversation to quickly catch up.

Copilot in Teams

Summarize this chat and make sure to include the key points and who made them.

2:00 pm

It's time for the pitch. Cassandra can focus on her presentation knowing Copilot is taking notes. She commands Copilot to list the questions asked so she can be sure everything gets answered during the call.

Copilot in Teams

What questions were asked during the meeting that have not been answered?
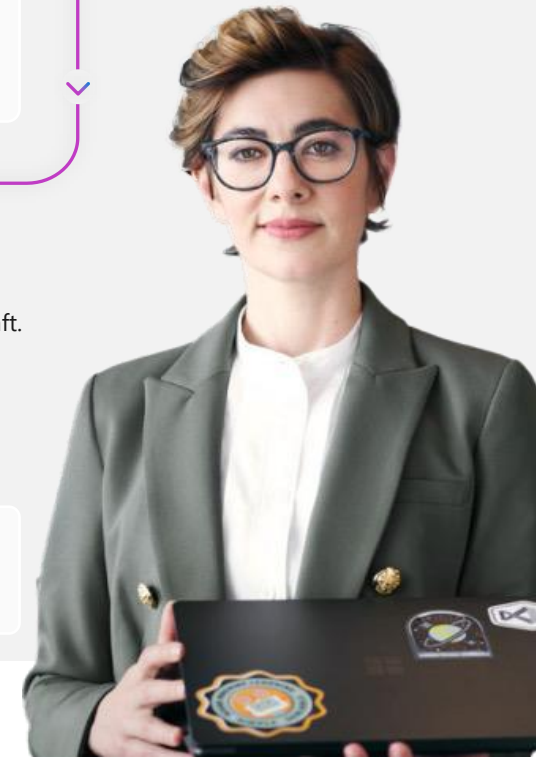
11:00 am

Cassandra puts the final touches on the pitch presentation by adding a slide based on the summary of the annual report she had Copilot draft.

Copilot in PowerPoint

Add a slide based on [copy in annual report summary].

Copilot in Technical Sales

Technical Sales strategic priorities

- Understand customer's technical requirements
- Stay up to date on product development
- Close collaboration with product team

Customer need

- Help Technical Sales employees convey product information clearly

Employee prompts

- **Summarize my communications** with Contoso and list any questions raised and any action items.
- **Draft an email** to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

Benefits

- Increase number of opportunities pursued
- Improve close rate
- Increase revenue per sale

Microsoft products

- Copilot for Microsoft 365
- Copilot for Sales
- Copilot in Dynamics 365 for Sales

Copilot in Customer Success

Customer need
- Help Customer Success employees convey customer needs and issues back to product teams

Employee prompts
- **Summarize my communications** with Contoso and list any questions raised and any action items.
- **Draft an email** to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

Benefits
- Improve customer retention
- Improve cross selling opportunities

Customer Success strategic priorities
- Respond quickly to customer issues
- Closely monitor product usage and value
- Collect customer feedback

Microsoft products
- Copilot for Microsoft 365
- Copilot for Sales
- Copilot in Dynamics 365 for Sales

Copilot in Telesales

Customer need
- Help Telesales employees make a quick pitch

Employee prompts
- **Summarize my communications** with Contoso and list any questions raised and any action items.
- **Draft an email** to follow up on the conversation

Benefits
- Improve customer retention
- Improve cross selling opportunities

Microsoft products
- Copilot for Microsoft 365
- Copilot for Sales
- Copilot in Dynamics 365 for Sales

Telesales strategic priorities
- Respond quickly to customer issues
- Closely monitor product usage and value
- Collect customer feedback

Copilot scenarios for
Marketing

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Marketing

Overview and KPIs

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

Use Case by Role

Copilot can simplify the tasks that execs 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 marketers are using Copilot in their day to day.

Using Copilot in Marketing

Goals and challenges

It's getting harder than ever to create leads with marketing content. The platforms and modalities to deliver marketing messages and splintering the audience. Marketing teams must overcome the traditional communications gap between marketing and sales and marketing and product teams to develop a cohesive strategy for success.

Copilot can assist with...

Copilot can help to achieve alignment between teams and help to generate creative content that can deliver a marketing message effectively.

- Collect and share product feedback
- Create a new offering
- Coordinate Market Research
- Product Launch
- Creating a BoM

Marketing roles

- Product marketing manager
- Content creator
- Pricing analyst

Microsoft Copilot opportunity to impact key Industry KPIs

Increase brand value

Improving the customer of marketing content and customer interactions such and emails and meetings can help to improve close rates. In addition, improving targeting, pricing analysis, and creating effective promotions can also improve close rate.

Number of leads created

Simplifying and automating tasks like preparing for meetings, tracking tasks. sending emails, creating proposals, and researching customer and product information can allow sellers to pursue more opportunities.

Cost per lead generated

Copilot makes researching product information easier and can prepare detailed responses to RFP questions with a simple prompt. Companies can also use Copilot Studio to create custom bots to answer questions based on curated information.

Accelerate growth   Cost savings and avoidance   Employee retention

KPI – Impact on brand value

Brand value isn't just about logos; it's about shaping perceptions and building lasting relationships with your audience. A strong brand fuels demand generation.

85% of users said Copilot helps them get to a good first draft faster.

Roles

Improving brand value can require input from:

- Brand Manager
- Creative Director
- Graphic Designer
- Digital Marketing Manager
- Product Marketing

Use cases

Draft marketing assets
- Improve marketing copy by having Copilot check for tone
- Improve quality of emails campaigns

Create pricing and promotions
- Use Copilot to research market conditions
- Use Copilot to compare sales across regions or other variables

Improve marketing materials
- Draft blogs with Copilot
- Create engaging social content
- Improve quality of emails campaigns

Microsoft AI solutions

- Copilot for Microsoft 365

KPI – Impact on number of leads

Lead generation is a critical aspect of marketing and paves the way toward gaining new customers.

Use cases

Inform market research
- Research company information and competitors
- Learn how to position the product
- Recap survey results

Improve demand generation materials
- Draft blogs with Copilot
- Create engaging social content
- Improve quality of emails campaigns

Speed up internal communications
- Have Copilot assist with emails
- Draft email comms and announcements with Copilot

Save time on administrative activities
- Generate meeting notes and follow up items

Roles

Generating more leads can require input from:

- Marketing Lead
- Content Strategist
- SEO Specialist
- Market Researcher
- Product Marketing Manager
- Digital Marketing Manager

Microsoft AI solutions

- Copilot for Microsoft 365

KPI – Impact on cost per leads

Cost Per Lead (CPL) is a crucial metric used to measure and monitor the effectiveness of marketing campaigns. It represents the amount of money a business spends to generate a single new lead.

Use cases

Improve quality of customer-facing materials
- Improve marketing content
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Create pricing and promotions
- Use Copilot to research market conditions
- Use Copilot to compare sales across regions or other variables

Inform market research
- Research company information and competitors
- Learn how to position the product
- Recap survey results

Roles

Impacting the cost per lead can require input from:

- Account Executive
- Technical Sales
- SEO Specialist
- Product teams
- Product Marketing
- Finance

Microsoft AI solutions

- Copilot for Microsoft 365

Marketing use case | Collect and share product feedback

Potential benefits (Increase brand value) (First draft faster) (Enhanced quality)

1. Summarize interviews

Engage with customer to understand their triumphs and challenges with the product through recorded interviews.

Copilot in Teams

Be present during your customer interview by relying on Copilot in Teams for transcription and summary.

2. Draft customer messages

Continue the conversation with your customer by sending a timely and thorough follow up email, capturing your earlier call.

Copilot in Outlook

Thank customers by asking Copilot in Outlook to draft a response and drop in bullets from the Copilot meeting summary.

3. Identify themes

Paste Teams summaries into a Word and prompt Copilot to show you themes. Create a follow up survey with Copilot in Microsoft Forms.

Copilot in Word
Copilot in Forms

Don't start with a blank page again. **Draft with Copilot** and get to a finished document in a fraction of the time.

6. Thank your stakeholders

Starting a new email, prompt Copilot in Outlook to draft a message to all key stakeholders with the results and path forward.

Copilot in Outlook

Save time preparing emails with Copilot as your drafting partner.

5. Share results

Use Copilot in PowerPoint to create a slide deck to share with the leadership and engineering teams. Use Copilot in Teams to capture action items and feedback.

Copilot in PowerPoint
Copilot in Teams

Creating a presentation makes it easier to convey a clear message especially when it's critical feedback on your product.

4. Analyze data

Use Copilot in Excel to sort and analyze data gathered from the surveys and website metrics.

Copilot in Excel

Identify insights with Copilot in Excel.

Marketing use case | Create a new offering

Potential benefits   (First draft faster)   (Streamlined collaboration)

1. Brainstorm with Copilot

Use Copilot in Loop to brainstorm ideas, leverage the draft marketing plan in the ideation, then incorporate the new ideas into the draft marketing plan by using Copilot in Word.

Copilot in Loop
Copilot in Word

Kickstart your project as you plan and collaborate easier with Copilot in Loop.

2. Draft new offering announcement

Prompt Microsoft Copilot to create content that is written in the style of a blog post or social media post, leverage existing documents including your Marketing plan.

Copilot

Brainstorm and draft content quickly with Copilot. Collaborate on ideas and content using your instructions or reference files.

3. Keep the team up to date

Use Copilot in Teams to summarize key meetings, identify most frequent questions, and action items from the meeting. Use this to generate an initial FAQ document by using Copilot in Word.

Copilot in Teams
Copilot in Word

Don't start with a blank page again. Draft with Copilot and get to a finished document in a fraction of the time.

6. Share results broadly

Post campaign evaluate how your new offering landed with customers and which channels proved the most effective.

Copilot in Excel
Copilot in PowerPoint

Using higher quality presentations makes it easier to highlight wins and lessons learned.

5. Execute your campaign

Leverage Copilot to create tailored messages to each of your communication channels to drive sales.

Copilot

With the **right prompt ingredients**, Copilot can provide something in the voice of your company – witty, smart, creative – you choose.

4. Prep your sellers

Create presentation from your Marketing Plan and FAQ to share with the sales team prior to the product promotion.

Copilot in Word
Copilot in PowerPoint

Document and socialize your plan to keep sellers up to date.

Marketing use case | Coordinate Market Research

Potential benefits (First draft faster) (Cost per lead)

1. Define the objective

Prepare a brief for your upcoming research by using Copilot for your first draft and tagging other key documents.

Copilot
Copilot in Word

Summarize many types of documents, including PDFs and website content, making it easier to consume dense content online.

2. Determine your approach

Meet the research team with your objective in hand. Determine the best research approach over a Teams meeting. Rely on Copilot in Teams for action items.

Copilot in Teams

Keep the conversation flowing onto meaningful topics to help cover the agenda quicker and reduce meeting times.

3. Discover market trends

Select the Show data insights prompt in Copilot in Excel.

Copilot in Excel

Use Copilot to help you explore and **understand your data better.**

6. Communicate results

Starting in a new email, prompt Copilot in Outlook to create a dynamic message that includes key links.

Copilot in Outlook

Document and socialize the research findings to help better inform product strategy.

5. Present the findings

In a new PowerPoint file, select the default Create presentation from file.

Copilot in PowerPoint

Let Copilot help you build a presentation by **generating slides** or images with your organization's branding.

4. Create a compete snapshot

Prompt Copilot in Word to draft you an internal snapshot of the findings, citing the results.

Copilot in Word

Don't start with a blank page again. Draft with Copilot and get to a finished document in a fraction of the time.

Marketing use case | Product Launch

Potential benefits   (Intel gathering)   (First draft faster)   (Streamlined collaboration)

1. Learn about your customer

Use Microsoft 365 Chat to gather market research data to better understand your customer.

Copilot

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify key pain points for customer.

2. Craft your positioning

Leverage those insights to draft a strategy document for brand awareness using Copilot in Word.

Copilot in Word

Create a draft of the announcement blog from your current documents.

3. Pitch your positioning

Present your plan to the leadership team and use Copilot in Teams to summarize the meeting and identify action items to ensure a successful product roll-out.

Copilot in PowerPoint
Copilot in Teams

Create a presentation from your blog document to present to sellers about the new offer and product that's coming to market.

6. Celebrate success

Use Copilot Chat to generate ideas for a punchy LinkedIn post for launch day.

Copilot

Creating **captivating taglines** is an art – get started by using the power of the AI language model.

5. Prepare your team

Use Copilot in Outlook to draft an email to your stakeholder group and include Loop and Copilot Teams meeting recap.

Copilot in Outlook

Draft a thank you note to the engineering team, marketing team, and event team for their efforts.

4. Develop your assets

Query your current asset depository with Copilot Studio to see what assets are currently available. Use Copilot in Loop to collaborate on branding elements that are still needed.

Copilot Studio
Copilot in Loop

Prompt Loop in Copilot to "Brainstorm a list of creative ways to introduce our new product to customers."

Marketing use case | Creating a marketing Bill of Materials

Potential benefits   Streamlined collaboration   First draft faster

1. Whiteboard ideas

Use Copilot in Whiteboard or Copilot in Loop to brainstorm ideas around the assets needed to upcoming PR announcement.

Copilot in Whiteboard
Copilot in Loop

Kickstart your project as you plan and collaborate easier with Copilot in Whiteboard or Copilot in Loop.

2. Create taglines

Come up with a clever tagline for the PR announcement that will be on all marketing materials, tying them together.

Copilot

Creating **captivating taglines** is an art – get started by using the power of the AI language model.

3. Create a MPF

Draft your messaging and positioning framework by starting with Copilot in Word and referencing key documents.

Copilot in Word

Get to a **first draft quickly** by relying on Copilot in Word for starting your MPF.

6. Track inventory

Use Copilot in Loop to collaborate with graphic designers and various groups on status of assets (draft, in design, in review).

Copilot in Loop

Use Copilot in Loop to collaborate and **stay in sync**.

5. Build assets

Build out additional assets like a product description and pitch deck with Copilot.

Copilot in Word
Copilot in PowerPoint

Draft a thank you note to the engineering team, marketing team, and event team for their efforts.

4. Meet with product group

Meet with the product group and use Copilot in Teams to summarize the meeting and identify action items to ensure alignment on key features.

Copilot in Teams

Leverage meeting recap to capture action items and alignment to move forward.

A day in the life of a Marketing Manager

8:00 am

Daichi uses Copilot to prepare a brief to give to the agencies bidding on a new advertising campaign.

Copilot in Word

Prepare a brief outlining the advertising strategy from Contoso widget marketing plan. Include sections on target market, pricing, tone, imagery, and taglines.

8:30 am

Daichi meets with his team to brainstorm feature enhancements based on customer feedback. Copilot categorizes the ideas for easier discussion.

Copilot in Whiteboard

Categorize the ideas.

10:00 am

Daishi must analyze the marketing data from the latest round of surveys. Using plugins made in Copilot studio, Copilot can pull the survey data from Mailchip or similar app. He uses Copilot in Excel to prepare charts so he can see the trends in the data.

Copilot Studio
Copilot in Excel

Show all data insights.

4:00 pm

Daichi needs to catch up on email before he heads out for the day. Copilot speeds the work by summarizing email threads and preparing draft responses.

Copilot in Outlook

Ask for more details.

2:00 pm

Daichi updates the roadmap deck to reflect the commitments from the engineering team meeting.

Copilot in PowerPoint

Add a slide based on [copy in bulleted list of roadmap updates]

11:00 am

Daichi meets with the engineering team to plan the development of new features. During the meeting he uses Copilot to understand the prioritization of the features.

Copilot in Teams

Create a table to categorize the features discussed so far by priority.

Daichi
is a marketing manager at Contoso

Copilot scenarios for
HR

Copilot scenarios for
HR

Overview and KPIs

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

Use Case by Role

Copilot can simplify the tasks that execs 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 HR employees are using Copilot in their day to day.

Using Copilot in HR

Goals and challenges

With changing worker expectations, multi-generational workforces, and hybrid workplaces it's becoming harder to keep talented people. AI is transforming HR by enabling predictive learning. Copilot can help to simplify access to data, improve quality and increase creativity, resulting in improvements to essential key performance indicators.

- Improve organizational agility
- Transform employee experiences
- Optimize HR programs
- Discover workforce insights

Copilot can assist with ...

Copilot helps you improve retention, while reducing costs by improving organizational agility, optimizing HR programs, using workforce insights, and transforming employee experiences.

- Managing internal job transitions
- Augmented hiring workflows
- Improved benefits and compensation processes

HRroles

- Talent Acquisition
- HR Compliance
- Planning and business alignment
- Employee Development

Microsoft Copilot opportunity to impact key Industry KPIs

Cost per hire
Employees improve the hiring process by using Copilot to help write job descriptions, summarize interviews, avoid bias when identifying top candidates, improve candidate communications, and improve onboarding processes.

Employee turnover rate
Copilot can help all employees get more satisfaction in their job by reducing boring or stressful tasks, work on higher value activities. It also makes many tasks faster, which can reduce overtime requirements.

Improved onboarding time
Speed time to value of new employees by simplifying access to information and training.

Accelerate growth   Cost savings and avoidance   Employee retention

KPI – Cost per hire

Employees improve the hiring process by using Copilot to help write job descriptions, summarize interviews, avoid bias when identifying top candidates, improve candidate communications, and improve onboarding processes.

How Copilot can help HR managers

Improve quality of recruitment experience and materials
- Improve job descriptions
- Improve interviews with summarization and recap
- Improve quality of emails and chats with candidates

Improve employee meetings
- Organize information from past interactions
- Completely focus during the meeting

Create internal feedback loop
- Draft candidate and new employee surveys
- Analyze surveys to gain valuable insights into what makes employees happy or areas that need improvement within the organization

Roles

- Human Resource Managers
- Department Hiring Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot
- Microsoft Copilot Studio

KPI – Employee turnover rate

Lowering the employee turnover rate is important for reducing costs, but also for overall employee morale.

How Copilot can help employee turnover rates

Improve quality of internal materials and processes

- Improve job descriptions for further role clarity
- Improve company meetings with summarization and recap
- Completely focus during the meeting

Improve employee collaboration

- Use Copilot in Loop to drive internal collaboration
- Use Copilot to surface ice breakers

Create internal feedback loop

- Draft employee surveys
- Analyze surveys to gain valuable insights into what makes employees happy or areas that need improvement within the organization

Roles

- Human Resource Managers
- Executive Leadership

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

KPI – Improve onboarding time

Reducing ramp up time is beneficial for everyone. It boosts employee confidence and engagement. It helps shorten the learning curve allowing employees to make an impact sooner.

How Copilot can help reduce onboarding time

Create onboarding materials

- Use Copilot to draft training guides
- Use Copilot to enhance employee handbooks

Improve onboarding process

- Generate onboarding documents and contracts
- Integrate relevant company policies and resources into the onboarding materials
- Draft check in emails to new hires to send during first 60 days on the job

Roles

- Human Resource Managers
- Department Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

KPI – Increase benefit usage

Create improved interfaces for employees to learn about their benefits and improve registration processes.

How Copilot can help increase benefit usage

Create HR benefit campaign
- Generate news and announcements from your HR team or department
- Communicate policies and procedures for HR-related matters, such as benefits, payroll, performance, and compliance

Improve the quality of benefit materials
- Create forms and workflows for HR-related requests, such as leave, expense, feedback, and recognition
- Surface learning opportunities and resources for employees.

Improve benefits information sessions
- Use meeting recap
- Generate follow up communications

Roles
- Human Resource Managers
- Benefit Managers

Microsoft AI solutions
- Copilot for Microsoft 365
- Microsoft Copilot + Viva

KPI – Improve eNPS

Roles

- Human Resource Managers
- Department Managers

Employee Net Promoter Score (eNPS) is a valuable metric for assessing employee engagement. It measures how likely your employees are to recommend your organization as a great place to work to their friends or family. Microsoft Copilot plays a pivotal role in enhancing employee Net Promoter Scores (eNPS) by fostering a positive work environment and empowering employees.

How Copilot can help improve eNPS scores

Create internal feedback loop

- Draft employee surveys
- Analyze surveys to gain valuable insights employee sentiment

Automate repetitive tasks

- Get to first draft faster by leveraging Copilot and Copilot in Word; reclaim time for creative/strategic projects

Improve All Hands and Team meetings

- Prepare for the meeting
- Focus during the meeting with Teams recap and transcription
- Generate follow up communications

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

Use Case | Managing internal job transitions

Potential benefits (Reduce time to hire) (Increase employee retention) (Reduce time to create documentation and training)

1. Reduce time to screen candidates

Reduces hours of manual screening to minutes. Indicate keywords from multiple documents to surface qualified candidates. Access HR system data using plugins built in Copilot Studio.

Copilot in Word
Copilot Studio in Copilot for Microsoft 365

Rapidly get up to speed on what candidates are most qualified for certain roles.

2. Schedule interviews efficiently

Use Copilot to schedule follow up interviews between candidates and the hiring manager.

Copilot in Outlook

Streamline scheduling multiple candidates for interviews by asking Outlook to identify and schedule interviews.

3. Create onboarding materials quickly

Use Copilot to create role-specific onboarding materials.

Copilot in Word

Reduce time to prepare onboarding documents leading to increased employee satisfaction and speed to onboard; helping employees' reach productivity quickly.

6. Automate performance review prep

Automate data collection and report generation for performance reviews.

Copilot in Word
Copilot in Excel

Compile data quickly and generate individual review reports to support the process.

5. Collect feedback on onboarding and training

Analyze employee survey data and summarize key findings to refine delivery and relevance.

Copilot in Excel

Focus on overall employee satisfaction and onboarding experience by responding to feedback and refining onboarding and training.

4. Develop training material

Build training materials that are tailored to each role and employee.

Copilot in PowerPoint

Keep training relevant to the audience by using Copilot to mine historical documents to update with relevant training content. As internal systems change training can adapt to it more quickly.

Use Case | Augmented hiring workflow

Potential benefits (Find more qualified candidates) (Streamline interview process and communication for group interviewing) (Reduce cost of onboarding)

1. Create a job description

Starting from a blank document, prompt Copilot in Word.

Copilot in Word

Create a job description by asking Copilot in Word to suggest skills, qualifications, and responsibilities.

2. Discover qualified candidates

Prompt Copilot in Microsoft Copilot.

Copilot

Discover the best candidates for a position by having Copilot extract skills, experience, and qualifications from a set of resumes.

3. Create interview questions

Prompt Copilot in Loop to create a set of interview questions.

Copilot in Loop

Create interview questions based on unique job requirements then crowdsource additional ideas and have Copilot create a final list.

6. Create onboarding materials

Starting with a new presentation, prompt Copilot.

Copilot in PowerPoint

Create powerful onboarding materials in PowerPoint.

5. Create an offer letter

Starting in a new email, prompt Copilot in Word.

Copilot in Word

Command Copilot in Word to draft a customized offer letter based on your inputs.

4. Conduct an interview

During the interview, prompt Copilot in Teams.

Copilot in Teams

Conduct a group interview in Teams and ask Copilot to summarize the contributions of each candidate.

Use Case | Streamline benefits and compensation

Potential benefits (Improve talent retention) (Attract the right talent) (Improve employee satisfaction) (Align HR strategy to company strategy)

1. Conduct market research

Research the latest industry trends and data regarding competitive compensation rates and benefits.

Copilot

Use Copilot to quickly generate tables of average salaries by market for different roles.

2. Draft Executive Summary for talent planning

Leverage market information to draft a plan the executive staff can consider for next fiscal year.

Copilot in Word

Turn a few thoughts on the data collected into a detailed planning document.

3. Ensure retention and employee satisfaction

Discuss the model for the retention and satisfaction strategy.

Copilot in Excel
Copilot in Teams

Make rapid updates to the financial model with Copilot and then have Copilot document an action items when the meeting is over.

6. Communicate to department managers

Communicate changes to departments and monitor employee engagement.

Copilot in Outlook

Draft an email to a group of department managers that provides detail and timelines regarding employee annual reviews and changes to the overall compensation and benefits.

5. Revise policy document

Use Copilot to revise relevant sections of the compensation policy document.

Copilot in Word

Use Draft with Copilot to turn the bullet points from the executive presentation into text for the policy document.

4. Incorporate changes into HR strategy

Generate an executive presentation detailing how the compensation strategy will align to the business need for growth and cost management.

Copilot in PowerPoint

Use Copilot to create a set of slides from the meeting notes to document the strategy and then copy in the Excel charts.

A day in the life of a HR Manager

8:00 am

Omar starts the day at home with an interview for a new teller candidate. He commands Copilot to suggest follow up questions and summarize the key points the candidate made.

Copilot in Teams

What are some good follow up questions to learn more about this person's skills and experience?

9:35 am

At the office Omar summarizes some chat threads that occurred overnight at a subsidiary and can quickly assess the situation and provide guidance to his team to address the issue.

Copilot in Teams

Summarize this thread and include the key issues and suggestions for resolution along with who had the suggestions.

10:00 am

Omar asks Copilot to create a summary of the organization's new compliance handbook to ensure it has the key points. He then commands Copilot to fill in the missing sections.

Copilot in Word

Summarize the Contoso Compliance Handbook in about four paragraphs for an executive and provide a list of key points.

4:00 pm

Omar has missed a few calls and emails. He commands Copilot to summarize the email threads and then uses the summaries to draft responses.

Copilot in Outlook

Summarize this thread.

2:00 pm

Omar commands Copilot to add a slide to his presentation that can be used to explain the team's initiatives.

Copilot in PowerPoint

Add a slide about potential HR initiatives.

1:00 pm

Omar queries his HR system dashboard using plugins built in Copilot Studio better understand attrition trends.

Copilot Studio in Copilot for Microsoft 365

Add a column that averages the other columns for each month.

Omar
leads HR for a regional bank

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 execs 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 ...

- Build a business case
- Improved collections processes

Finance roles

- Accountant
- Auditor
- Analyst
- Operations
- Procurement

Microsoft Copilot opportunity to impact key Industry KPIs

Days sales outstanding
Improve billing and collections processes by enhancing communications with customers and vendors. Improve the analysis of discounted payment options. Speed decision-making on new products, pricing, and promotion with improved business case processes.

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

Accelerate growth   Cost savings and avoidance   Employee retention

KPI – Days sales outstanding/improve cash flow

Collections play a crucial role in any business. Timely and efficient collections ensures steady cash flow, decreases bad debt, and boosts profitability.

How Copilot can help reduce the days of an outstanding Sales

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

Improve customer meetings

- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications regarding outstanding balance or payment plan

Roles

- Collection Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

KPI – Reduce spend on financial systems and tooling

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

How Copilot can help reduce spending on systems and tooling:

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
- Microsoft Copilot

KPI – Reduce departmental spending

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

How 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

Automated Data Analysis in Excel:

- Quickly analyzes trends, performs advanced calculations, and generates comprehensive reports, saving hours of manual work.
- Create sourcing strategy decks

Efficient Email Management in Outlook:

- Prioritizes essential emails, schedules responses, and organizes inboxes efficiently
- Ensures less time spent sorting emails, allowing focus on critical decisions

Custom Support Chatbots (Built with Copilot Studio):

- 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
- Controller
- Financial Planner
- Data Managers
- Treasury Manager
- Strategic Planners
- Risk Manager

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot + Viva

Finance | Build a Business Case

1. Define opportunity for investment

Ask copilot to create a project brief from emails and other company documents.

Copilot

Support efficient review and understanding of the issues that need to be addressed with the investment.

2. Gather project information

Meet with the production team to learn about the various options available and gather financial information for the business case.

Copilot in Teams

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

3. Gather financial data

Pull data from the financial system using a plug in built with Copilot Studio to estimate past cost of sales and revenues by year.

Copilot in Excel
Copilot Studio in Copilot for Microsoft 365

Reduce the effort required to pull information from financial systems.

6. Stress test the business case

Use Copilot to test some options for the business case and identify the largest variances.

Copilot in Excel

Speed analysis by using Copilot to add formulas columns and create charts.

5. Produce summary report

Once the case flow analysis is complete use Copilot to turn the project brief into a set of slides for the executive presentation. Then add in the financial information.

Copilot in PowerPoint

Improve the quality of your presentations by using Copilot to revise content and organize the slides using Excel data.

4. Meet with chief economists

Get the latest economic forecast from the economist team to estimate future pricing and cost of materials. Organize the information in a table in Excel and use Copilot to produce charts showing trends in the data.

Copilot in Excel
Copilot in Teams

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

Finance | Collections Coordination

Potential benefits   (Cash flow acceleration)   (Speed decision making)

1. Surface outstanding invoices

Ask Copilot to identify customers who have outstanding invoices using plugins built with Copilot Studio.

Copilot
Copilot Studio

Speed analysis by connecting Copilot to your data in CRM and finance systems.

2. Build call script

Use Copilot to refine the call script used to communicate the unpaid invoices to customers.

Copilot in Word
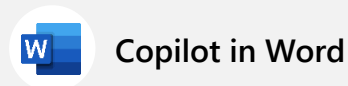
Build conversation script, suggesting the most effective and policy complaint approach to remind of the balance and negotiate payment terms.

3. Call customers

Call customers who have outstanding balances to provide guidance on creating a payment plan.
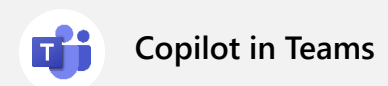
Copilot in Teams

Simplify capture of customer intent and production of 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

Use Copilot to help find notes from meetings,, emails, and chat for crafting updates document the payment plan in the finance system.

Copilot

Simplify the process of updating customer records by collecting information from various sources.

4. Send payment reminders

Use Copilot in Outlook to draft a follow up email beginning with the recap of the phone call.

Copilot Outlook

Automate drafting of emails and use Copilot to revise the tone based on the customer situation.

A day in the life of an Income Tax Compliance Manager

8:00 am

Emma has several new emails from 3rd parties in relation to tax returns. Instead of reading through each email, she uses Copilot to summarize the long email threads.

Copilot in Outlook

Summarize this email thread and list any action items.

8:30 am

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

Copilot in Excel

Explain the formula used to calculate deprecation for Contoso.

9:00 am

Emma requests Copilot to create a list of all the emails and Teams messages related to the Contoso tax return to ensure there are no follow up items. She replies to the email thread to the tax preparation team that the documents are ready for Contoso and requests Copilot to coach her message to ensure it is clear.

Copilot

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

4:00 pm

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

Copilot in Excel

Highlight any variances in 'Section D: Total Assets' 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 (Power Automate) instead of manually reviewing it.

Copilot in Power Automate

Extract the information from a structured document.

Emma
works in
Tax & Customs

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

8:00 am
Shali starts her day using Copilot to catch up on action items from the previous day. She also asks Copilot to help her prepare for her meetings today.

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 solution proposals for senior leadership review using the Meeting Recap and relevant files. She asks Copilot to revise the draft to me 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 start developing reporting for stakeholders. She asks Copilot 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 to summarize new emails and draft the project status updates or follow up emails to the stakeholders.

Copilot in Outlook

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

2:00 pm
Shali start another project on building Power App to collect insights from various sources either text input or uploaded files. She asks Copilot to first suggest relevant fields then create an app based on the ask.

Copilot in Power Apps

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 to notify users on the potential overloads. She asks Copilot to create a Power Automate flow to automate the process, she also uses Copilot to 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 in Finance

8:00 am

Kim has several new emails from vendor companies and internal teams. Instead of reading through each email, he uses Copilot to summarize the long email threads.

Copilot in Outlook

Summarize this thread.

9:30 am

Kim opens Excel to analyze a vendor's compliance data. He uses Copilot to generate a new formula column. He also uses Copilot to visualize the data.

Copilot in Excel

Suggest formulas for this column.
Show insights in charts.

10:00 am

A meeting with a vendor. During the meeting, Kim uses Teams and use Copilot to keep track of the discussion. After the meeting, he uses Copilot to identify next steps

Copilot in Teams

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

Kim
is a Vendor Engagement Manager in Finance

4:00 pm

Kim uses Copilot Chat to manage his tasks. He create a meeting agenda based on this chat history to prepare for his meetings. He also uses Copilot to schedule follow-up meetings.

Copilot

Create a meeting agenda based on this chat history.

2:00 pm

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

Copilot in Word

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

11:00 am

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

Copilot in PowerPoint

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

A day in the life of a Financial Analyst

8:00 am

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

Copilot in Excel

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 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 Copilot to create a summary.

Copilot

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

4:00 pm

Hillary heads back into 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

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 asks Copilot to summarize the thread.

Copilot in Teams

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 to turn the document into a presentation for the business development team.

Copilot in PowerPoint

Create a presentation from [Word document link to Fabrikam acquisition overview.docx]

Hillary
is a Financial Analyst at Contoso

Copilot scenarios for
IT

Copilot scenarios for
IT

Overview and KPIs

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

Use Case by Role

Copilot can simplify the tasks that IT pros 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 IT pros are using Copilot in their day to day.

Using Copilot for Microsoft 365 in IT

Goals and challenges

IT professional's goals include, increase digital transformation, optimizing collaboration, and adopting emerging technologies like serverless computing, AI, and the Internet of Things (IoT). However, they also grapple with challenges such as the work force skills gap and reducing spending. Balancing these goals and increasing need for efficiency is essential for IT professionals to thrive in today's fast-paced technological landscape.

Copilot can assist with ...

Copilot can help to reduce the workload on IT and support staff by assisting to:

- **Create a Project Plan**: Copilot assists IT professionals with tasks such as writing, editing, summarizing, and creating data visualizations.
- **Document and Communicate Best Practice**: Copilot assists in creating comprehensive documentation. Whether it's documenting system configurations, network setups, or best practices, Copilot can generate clear and concise content.
- **Procure New IT Solution**: Copilot makes the procurement process easier for teams, by simplifying and speeding up common activities such as, communications, creating documents, or leading more productive meetings.

IT roles

- Developer and Analyst
- IT Manager
- Project Manager
- Support Specialist

Microsoft Copilot opportunity to impact key Industry KPIs

Reduce outstanding support tickets
Microsoft Copilot enhances customer support by integrating AI assistance into workflows. With AI-assistance through bots, documentation and enhanced collaboration, your support team can work together seamlessly, ensuring consistent and effective service delivery.

Decrease app downtime
Microsoft 365 Copilot is your secret weapon against app downtime. Imagine a world where issues are proactively resolved, system health is optimized, and your users experience uninterrupted productivity.

Reduce costs
Microsoft 365 Copilot offers a trifecta of cost-saving benefits for IT departments. First, by fostering increased collaboration, it streamlines knowledge sharing and problem-solving, reducing the need for redundant efforts. Second, its enhanced communication tools ensure efficient coordination among team members, minimizing delays and costly misunderstandings. Lastly, Copilot's knack for quickly identifying problems allows proactive resolution, preventing costly downtime and resource wastage.

Accelerate growth | Cost savings and avoidance | Employee retention

KPI – Reduce outstanding support tickets

Imagine a scenario where customer inquiries are addressed swiftly, issues are resolved proactively, and your support team operates like a well-oiled machine. By leveraging Copilot's intelligent insights and gained efficiency, you'll be able to enhance customer satisfaction and optimize your team's productivity and resource allocation.

How Copilot can help reduce outstanding support tickets

Increase support communications and follow up efficiency:

- Have Copilot assist with emails inbound and outbound emails
- Draft email comms and announcements with Copilot
- Generate meeting notes and follow up items

Improve quality of support materials:

- Improve awareness and educational materials
- Improve quality of emails and chats
- Use Copilot to draft training guides
- Use Copilot to enhance employee handbooks
- Gets answer fast by searching internal sites and documents

Roles

- IT Service Desk Analyst
- Services Desk Managers
- Knowledge Base Curators
- Project Manager
- IT Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot
- Microsoft Copilot Studio

KPI – Decrease app downtime

Roles

- Support Specialist
- Network Engineer
- Incident Response Team
- Cloud Architects
- Project Manager
- Developers
- Product Managers

Imagine a world where your applications remain consistently available, seamlessly serving users without interruptions. Why is this important? Because app downtime can lead to lost revenue, frustrated customers, and damage to your brand reputation. Copilot provides your team with increased efficiency and productivity that supports them as they keep the apps running and maximizing user satisfaction.

How Copilot can help decrease app downtime

Respond to user complaint or inquiry:
- Respond quickly to inbound emails
- Access customer records for improved support
- Gets answer fast by searching internal sites and documents

Speed up internal communications:
- Draft emails with Copilot
- Draft email comms and announcements with Copilot

Save time on administrative activities:
- Generate meeting notes and follow up items

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot
- Microsoft Copilot Studio

KPI – Decrease costs

Whether it's trimming operational expenses, streamlining processes, or maximizing the value of investments, cost reduction directly impacts profitability, competitiveness, and long-term sustainability. By strategically managing costs, businesses can allocate resources more efficiently, enhance financial stability, and remain agile in an ever-evolving market.

How Copilot can help reduce costs

Create internal feedback loop to identify cost saving areas:

- Draft employee surveys focused value of resources utilized and ideas for cost savings
- Analyze surveys to gain valuable insights into what makes employees happy or areas that need improvement within the organization

Improve employee efficiency and productivity:

- Have Copilot assist with emails and document drafts
- Save time on administrative activities such as generating meeting notes and follow up items

Roles

- Chief Information Officer
- IT Managers
- Procurement Specialist
- IT Operations team

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

Use Case | Create a Project Plan

Potential benefits (Decrease Costs)

1. Summarize Requirements and Data

Leverage Copilot to summarize all requirements and related data to build the framework for the project.

**Copilot
Copilot in Word**

Clearly outline the project's purpose, goals, and deliverables using Copilot in Word.

2. Discuss the plan

Meet with the team to discuss the project plan and delegate responsibilities to team members based on their expertise.

Copilot in Teams

Summarize the meeting and list the action items discussed and their status using Copilot in teams.

3. Brainstorm risks

Whiteboard potential risks with the team and leverage Copilot to create an initial list and categorize all the items at the end of the session.

**Copilot in Loop
Copilot in Word**

Incorporate all categorized items into original project plan document using Copilot for Word.

6. Revise support procedures

After project is completed, use Copilot to revise procedures and change management documents for support teams and admins.

Copilot in Word

Ensure high writing quality using Copilot to revise first drafts.

5. Create an executive update

Create a presentation to brief the CIO on the project status and results. Use Copilot to create slides based on the project plan.

Copilot in PowerPoint

Create a presentation from Project Plan Word document.

4. Coordinate updates

Coordinate all update activities in a Teams channel. Produce summaries to channel activities each morning to stay up to date.

**Copilot
Copilot in Teams**

Stay informed on project activities by using Copilot to summarize communications.

Use Case | Document and Communicate Best Practices

Potential benefits

(Skill Development) (Increased Job Satisfaction) (Faster Completion Times) (Improved Documentation Quality and Accuracycy)

1. Document Solution

Craft document that outline steps for best practice. In addition, add specific results generated from solution.

[W] **Copilot in Word**

Quickly make create draft and pull in data from data sources to support outcomes.

2. Get Customer Information

Using plugins built in Copilot Studio, easily access CRM information to pull customer information that supports best practice impact, such as opportunity pipeline and customer revenue.

Copilot Studio in Copilot for Microsoft 365

Rapidly gather critical information to support newly identified best practice.

3. Brainstorm Ideas

Create list of ideas to optimize best practice. Leverage Copilot to create an initial list. Then categorize all the items at the end of the session.

Copilot in Loop

Accelerate your project as you plan and collaborate easier with Copilot in Loop.

6 Revise support procedures

Based on the Leadership teams comments revise best practice documents for future use.

[W] **Copilot in Word**

Quickly make summarize LT feedback to improve the quality of the best practice documentation.

5. Create an executive update

Create a presentation to brief the Leadership Team on this new best practice. Use Copilot to create slides based on the project plan.

[P] **Copilot in PowerPoint**

Create a presentation from best practice documentation located in Word.

4. Summarize conversations

Prepare communication and incorporate summaries and action items from previous meeting.

[O] [W] **Copilot in Outlook Copilot in Word**

Summarize and the latest conversations and assign action items.

Use Case | Procure New IT Solution

Potential benefits [Reduce Costs]

1. Gather Business Requirements

Aggregate multiple threads of conversations to create a wholistic view of all essential business requirements for the new solution.

Copilot in Teams

Be present during the meeting by relying on Copilot in Teams for transcription and summary.

2. Research Solutions

Quickly identify and summarize existing solutions in market with Microsoft Copilot.

Copilot

Save time and increase accuracy by asking Copilot to prepare a summary of information gathered from multiple sources.

3. Create a Build vs. Buy Analysis

Compile quotes from vendors and work with internal development teams to build a variance analysis with Copilot In Excel.

Copilot in Excel
Copilot in Whiteboard

Leveraging the variance analysis, whiteboard the pros and cons for each solution. Utilize Copilot in Whiteboard to categorize the initial list.

6. Create and Send Launch Communication

Use Copilot in Outlook to easily draft an email announcing the new solution and thanking contributors.

Copilot in Outlook

Use Copilot to review your email to ensure that is clear, concise, and impactful.

5. Summarize weekly status meeting

Hold status update meetings to track the procurement process. Use Copilot to summarize each meeting and list open items

Copilot In Teams

During the meeting you can ask Copilot for suggestions on questions to ask or next steps to discuss to keep the conversation on track.

4. Create Solution RFP

Draft RFP to the selected vendors using Copilot to take content from your emails, meeting notes, and presentations.

Copilot in Word

Document and socialize the RFP to ensure all business requirements are being met, and all necessary approvals have been received.
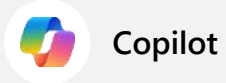
A day in the life of an IT Administrator

Will is an IT Administrator at Contoso

7:30 am

Will arrives at the office and commands Copilot to check his emails and chats for any urgent issues. He uses Copilot in Outlook to draft replies confirming resolution for each issue.

Copilot

Summarize any incidents that have been reported last night from my email and chat messages.

8:00 am

He attends the daily standup to discuss priorities for the day. During the meeting Will uses Copilot to check for unanswered questions.

Copilot in Teams

Tell me if there are any unanswered questions and make some suggestions for questions that should be asked.

9:00 am

With no system issues to work on now, Will can revise a project plan. He commands Copilot to fill in some missing sections.

Copilot in Word

Create a paragraph on system setting changes from the Fabrikam system upgrade documentation.

1:30 pm

Will revises his presentation for a meeting with HR on his recommendations for a new employee experience solution that HR has requested. He uses Microsoft Copilot to summarize the product website and then turns it into a slide.

Copilot in PowerPoint

Add a slide based on [copy summary of the web site]

3:00 pm

Will returns to Teams to catch up on a meeting he missed when he had to troubleshoot a server issue. He checks out the recap and asks for the key points and action items.

Copilot in Teams

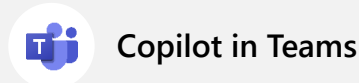**Summarize this meeting** and provide the key points and action items

4:00 pm

At the end of the day Will has some time to research new devices for the next laptop upgrade. He commands Copilot to produce a report on the best laptops for business users.

Copilot

What are the most popular laptops for enterprise organizations this year?