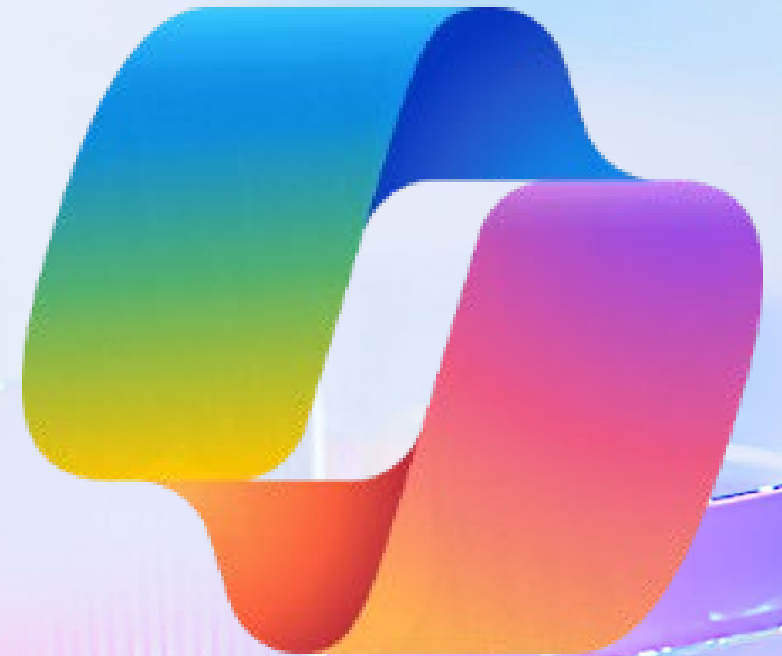




# Copilot Use Cases

Embrace the AI-powered future of work



# Copilot brings AI to everyone. Support roles like...

## Executive

CEO  
CIO  
CMO  
GM  
President  
Sr Manager  
Team Leader

## HR

Employment Specialist  
HR Assistant  
Recruiter  
Labor Relations  
Payroll Specialist  
Learning Lead

## Operations

Operations Analyst  
Operations Manager  
Quality Control Lead

## Sales

Account Executive  
Quality analyst  
Onboarding Specialist  
Sales Associate  
Sales Engineer  
Sales Representative

## Marketing

Brand Manager  
Content Strategist  
Creative Director  
Graphic Designer  
Market Researcher  
Product Marketing Manager

## Finance

Accountant  
Financial Analyst  
Finance Manager  
Investment Manager  
Financial Advisor  
Risk Specialist

## IT

Cybersecurity Analyst  
Help desk Support  
Hardware Technician  
IT Project Manager  
Network Administrator  
Software Developer

Click on the use case you'd like to review

Keep  
**Executives**  
informed

Keep your  
**Operations**  
running smoothly

Streamline  
**Finance**  
decisions

Help **HR** with  
hiring and  
engagement

Boost  
**Marketing**  
speed and creativity

Amplify **IT**  
efficiency

Give your **Sales**  
team an AI assistant  
to close deals



# The Pace and Volume of Work have only increased

**64%**

of employees don't have  
enough time or energy  
to do their job

**3x**

More meetings  
than 2020

**18**

Searches  
per day



# Copilot for Microsoft 365 AI for Executives



## Your Personal AI Assistant

**68% of people**

say they don't have enough uninterrupted focus time during the workday

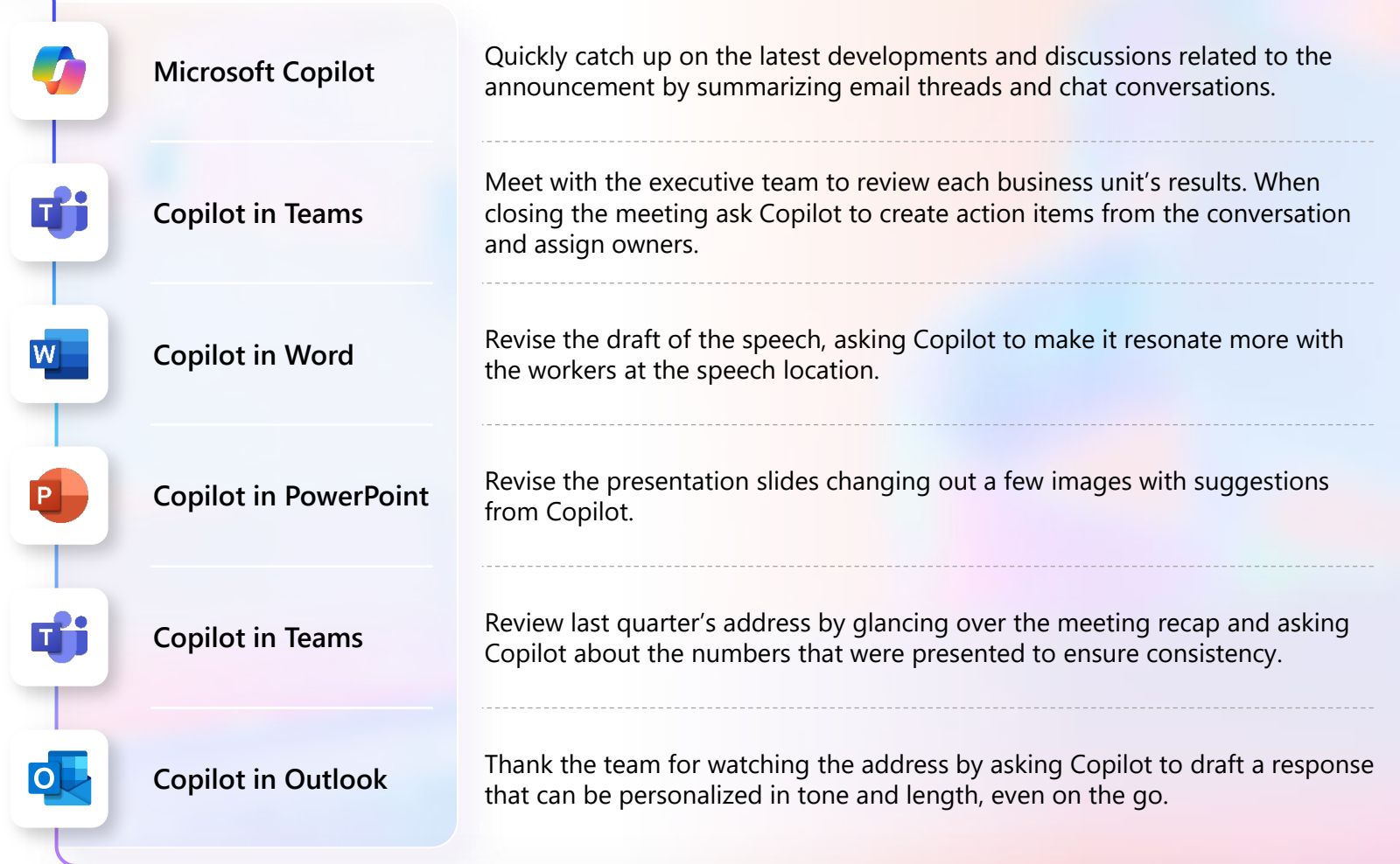


# Prepare for a company-wide address

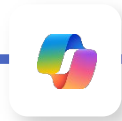
Executives are always pressed for time and Copilot simplifies many tasks in preparing for a meeting. But some things have to be perfect. Copilot also improves work quality so big events can happen flawlessly.

## 68% of people

say they don't have enough focus time during the workday



# Prepare for a company-wide address



## Catch up

On chats and emails by prompting Microsoft Copilot

**Summarize** my emails and chats from the past week that mention the year-end results.



## Gather team input

From the meeting recap prompt Copilot in Teams

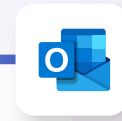
**Generate a list** of the key points made by each speaker.



## Revise the speech

Within the Word document select a paragraph and Copilot will offer several ways you could rewrite it

**Rewrite with Copilot.**



## Create the invitation

From a new email select Draft with Copilot

**Draft a detailed email** thanking all employees for attending the year-end review. Make the tone friendly and mention how excited we are to continue our progress in the new year.



## Review last quarter's speech

From the meeting recap prompt Copilot in Team

**Summarize the meeting** and list the key points. Tell me all of the revenue numbers that were presented



## Revise the presentation slides

Within the presentation prompt Copilot

**Add an image** of an inspiring landscape of a mountain to match the company motto – "We overcome every obstacle"



# 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



Microsoft 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 [Company Bonus Plan for FY23](#).



Tanya leads a product development team



# Copilot for Microsoft 365 AI for HR



Banish your busywork

**3 in 4 people**  
would be comfortable using  
AI for administrative tasks

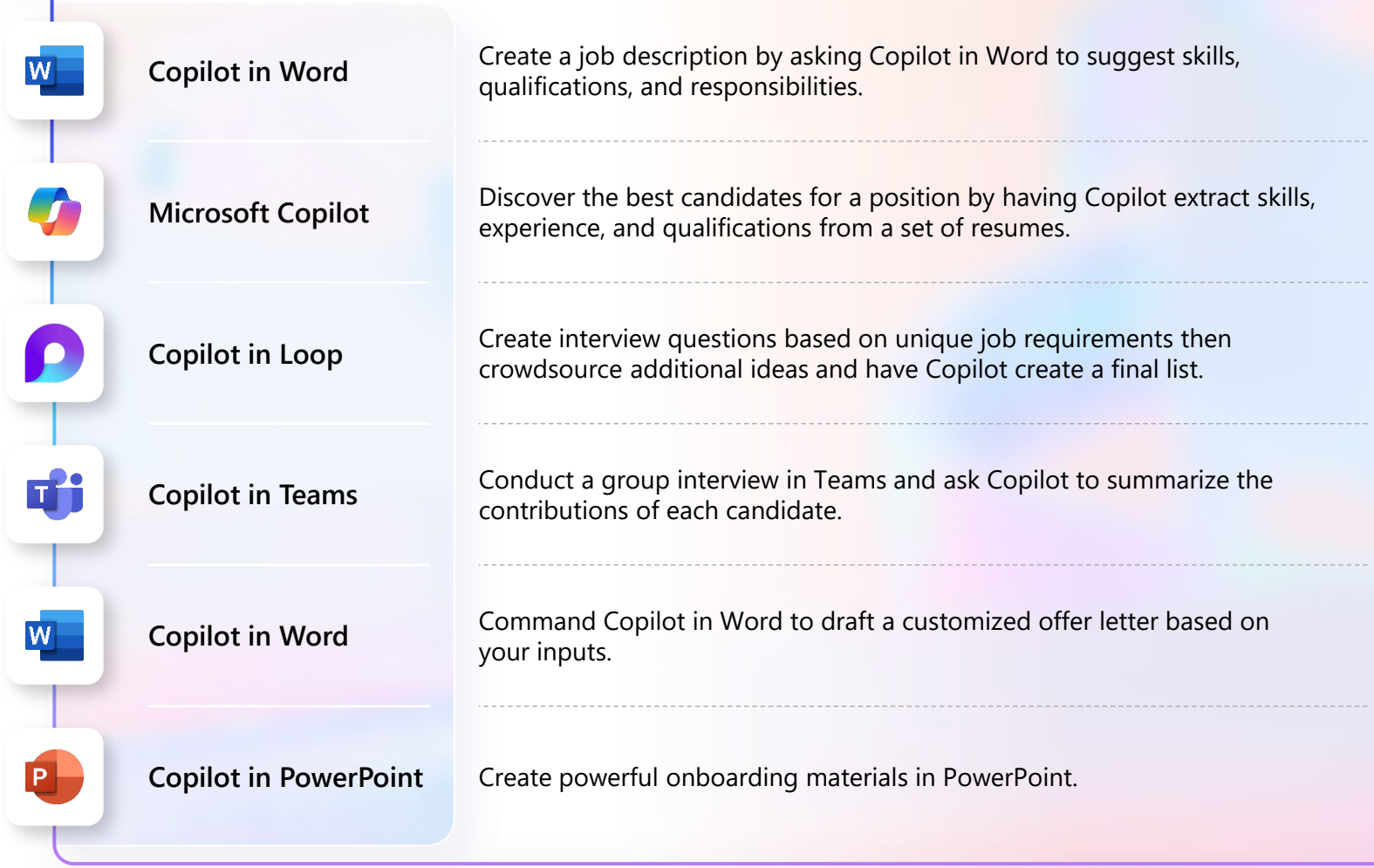


# Copilot for Microsoft 365 augmented hiring workflow

Hiring and onboarding typically costs a full year's salary for each employee lost to attrition. Copilot for Microsoft 365 can help you create a more efficient hiring process that reduces costs and help ensure that you are selecting the most suitable candidates.

## 3 in 4 people

would be comfortable using AI for administrative tasks



[→ Get Started with Copilot](#)

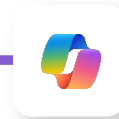
# Copilot for Microsoft 365 augmented hiring workflow



## Create a job description

Starting from a blank document prompt Copilot in Word

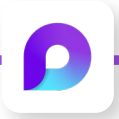
Create a job description for a senior animation designer role, based on the [Design Team Core Responsibility](#) document.



## Discover qualified candidates

Prompt Copilot in Microsoft Copilot

Based on [Candidate #1 resume](#) provide a summary of the skills, experience, and qualifications of the candidate.



## Create interview questions

Prompt Copilot in Loop to create a set of interview questions

Create a set of interview questions for the position of Senior Animation Designer. Ask about previous experience, goals, and include some questions about personal interests.



## Conduct an interview

During the interview prompt Copilot in Teams

What would some good follow up questions be based on what we have already discussed and are there any questions that I have not answered?



## Create an offer letter

Starting in a new email prompt Copilot in Word prompt

Create an offer letter to Maya for the position of Senior Animation Designer with a start date of March 16<sup>th</sup>. Include details on our benefits from our [Benefits Handbook](#).



## Create onboarding materials

Starting with a new presentation prompt Copilot

Create a presentation from [Word document link to Senior Animation Designer Job Description] Create an overview the job responsibilities .



# A day in the life of an 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 [Company Compliance Handbook](#) in about four paragraphs for an executive and also 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

The bank has recently initiated some employee experience initiatives, so Omar checks the latest attrition numbers in Excel and asks Copilot to add some calculations and produce a chart for his presentation to his leadership team.



Copilot in Excel

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



Omar leads HR for a regional bank



# Copilot for Microsoft 365

## AI for Operations



Capture actions to keep operations running

**80% of people**  
would be comfortable using AI to summarize  
meetings and action items

# Solve a production issue with Copilot for Microsoft 365



Production issues cost money so solving them quickly is always a top priority. Using Copilot for Microsoft 365 to identify issues and find solutions can reduce the cost of lost production.

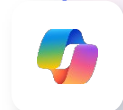
## 80% of people

would be comfortable using AI to summarize meetings and action items



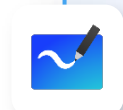
### Copilot in Excel

Discover production defect rates for Six Sigma reporting using Copilot in Excel to suggest new calculations and produce charts.



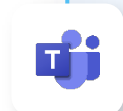
### Microsoft Copilot

Discover solutions to similar production issues using Microsoft Copilot to search internal files.



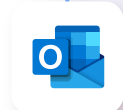
### Copilot in Whiteboard

Organize the ideas after a whiteboarding session for potential solutions.



### Copilot in Teams

Hold a weekly meeting to track the implementation of the solution. Use Copilot to summarize each meeting and list open items.



### Copilot in Outlook

Create an email to the engineering and production employees thanking them for their extra work in resolving the issue.



### Copilot in PowerPoint

Create a presentation on the root cause analysis based on the analysis report.

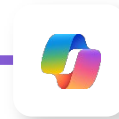
# Solve a production issue with Copilot for Microsoft 365



## Analyze production data

Using a table of Six Sigma data select the prompt Show data insights

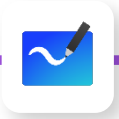
Show data insights.



## Discover past solutions

From Microsoft365.com prompt Copilot in Microsoft Copilot

Find information on troubleshooting our current production equipment from across the equipment manuals. Look for information on how to reset the processor.



## Brainstorm new solutions

After collecting the ideas click on Organize using Copilot in Whiteboard

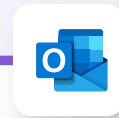
Organize



## Summarize the weekly status meeting

From the meeting recap prompt Copilot in Teams

Summarize the meeting and list the action items discussed and their current status.. List all of the decisions that were made and issues that were resolved.



## Thank employees for their work

Starting in a new email prompt Copilot in Outlook

Create an email thanking all the people who helped to identify the issue and implement the solution. Include that we resumed full production on Tuesday at 6 pm and limited the shutdown to 3 days.



## Create a root cause analysis report

Starting with a new presentation prompt Copilot

Create a presentation that summarizes [Word document link to Production issue root cause analysis report.docx]



# A day in the life of an Operations manager



7:00 AM

Megan meets with the production team at the overseas manufacturing site to discuss changes required for new product updates.



Copilot in Teams

**What are some good follow up questions** to make sure I understand the impact on the manufacturing process for each product update we discussed?

8:30 AM

At the office Megan reviews the manufacturing cost impacts of suggested product design changes.



Copilot in Excel

**Add a column** that totals the additional costs for the priority 1 updates.

9:00 AM

Megan asks Copilot to create a new presentation based on the Product Design Guidelines and then she copies in the charts from the cost analysis.



Copilot in PowerPoint

**Create a presentation** from [Word document link to Project \_\_\_\_\_ Design Guidelines]

4:00 PM

Megan needs to finish up the leadership white paper for her new product proposals. She asks Copilot to revise some of the sections and adds an executive summary.



Copilot in Word

**I need to share the main points** in an executive summary. Write three paragraphs that include why these points are important to our company.

2:00 PM

After a lunch meeting, Megan uses Copilot to summarize her new emails and draft responses. She also reviews the recap of a meeting she missed and asks Copilot to list her action items.



Copilot in Teams

**What are the action items from the meeting** include who proposed the item and who was designated as being responsible.

11:00 AM

Catching up on requests for time off, Megan asks Copilot to find all emails from this month asking for time off. The requests all look good, so she asks Copilot to draft approval messages.



Microsoft Copilot

**Find all of the emails** I received this month where people are asking for time off.

Megan leads a product development team



# Copilot for Microsoft 365 AI for Sales



Give your sales team an AI assistant

**86% of people**  
are looking for AI to assist with  
finding the right information

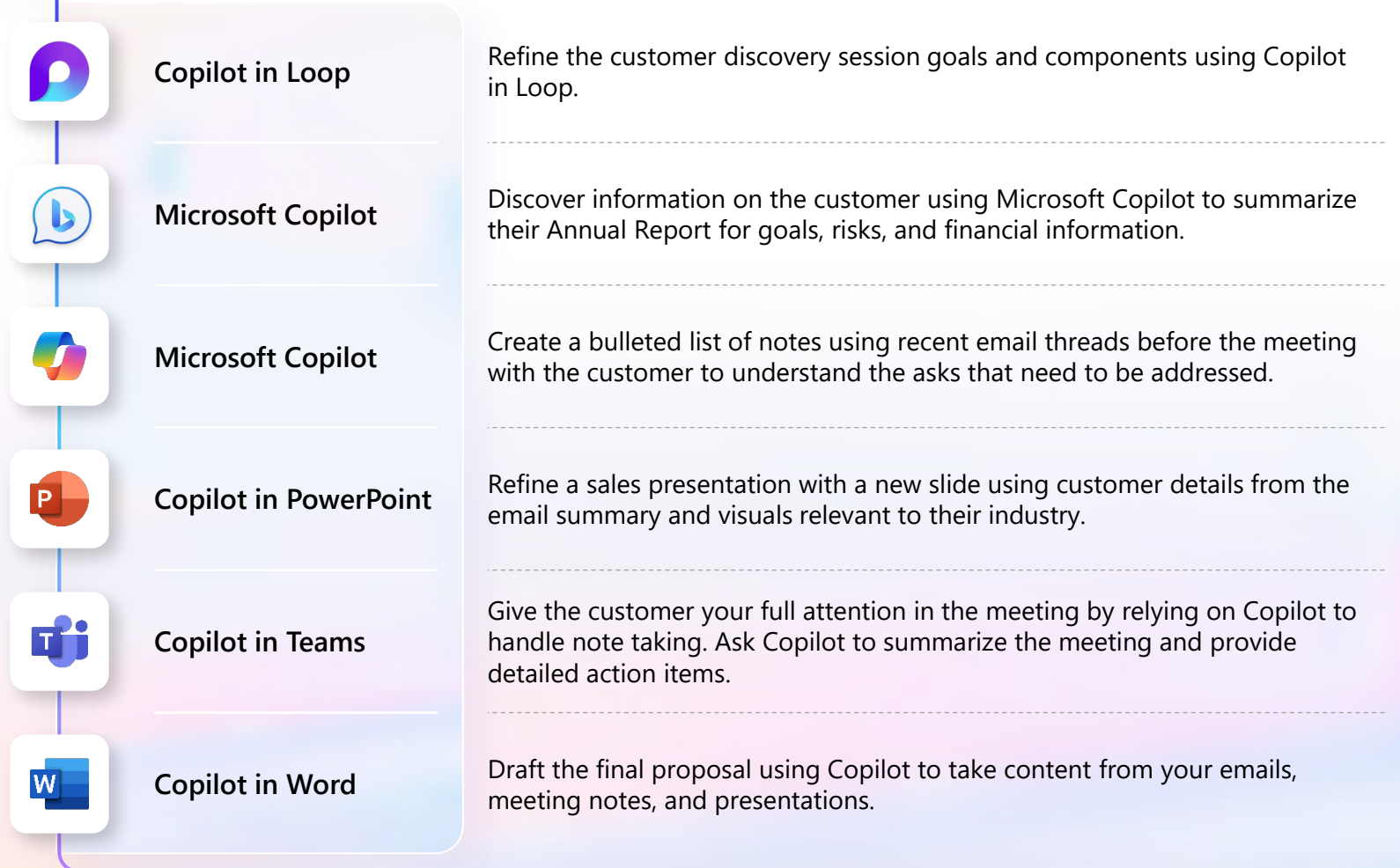


# Deliver better sales presentations with an AI assistant

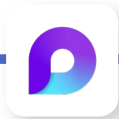
From conducting industry research to creating proposals, Copilot works alongside sales teams, handling administrative and routine, repetitive tasks. As a result, they can save time and focus on building pipeline and closing deals. .

## 86% of people

are looking for AI to assist with finding the right information



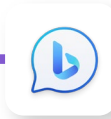
# Deliver better sales presentations with an AI assistant



## Refine a discovery session

Prompt Copilot in Loop

**Create a set of questions** for a customer discovery session focused on the primary use cases for the product.



## Discover company information

Prompt Microsoft Copilot in the Edge browser sidebar

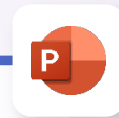
**Summarize** the [ ] annual report including goals, risks, and financial metrics.



## Find the asks in your emails

From the Microsoft Copilot app in Teams prompt

**Provide me with a bulleted list** of notes from my emails mentioning Company over the last two weeks.



## Update the sales presentation

In the existing presentation prompt

**Add a slide about** [copy in email summary from Microsoft Copilot] and include an image appropriate for the medical industry.



## Summarize the meeting

From the meeting recap prompt Copilot in Teams

**Summarize the meeting** and list the action items discussed and their current status.



## Create the proposal

Starting with a new document prompt Copilot

**Create a proposal based on** [xxxxxx Sales Presentation.pptx](#) and [Sales Meeting Notes.docx](#).



# A day in the life of a Sales Lead

8:00 AM

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



Microsoft Copilot

**Summarize** all of the emails and Teams chats in the past month from Company 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.**

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]



Cassandra is a sales lead at Company



# Copilot for Microsoft 365 AI for Marketing



No one needs to start from scratch

**73% of people**  
are comfortable using AI for creative work



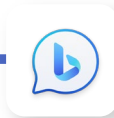
# Create a marketing pitch in record time

From developing strategic marketing plans, to collaborating with other teams, to composing copy, Copilot works alongside marketing teams, so they can focus on turning ideas into qualified revenue opportunities.

**73% of people**  
are comfortable using AI  
for creative work

	<b>Microsoft Copilot</b>	Utilize Microsoft Copilot to discover market research data and understand the key competitive offerings in each targeted market.
	<b>Copilot in Excel</b>	Discover trends and outliers in the latest market research to identify which markets to target with promotions.
	<b>Copilot in Word</b>	Command Copilot to draft a targeted promotion plan with suggested taglines.
	<b>Copilot in PowerPoint</b>	Create a pitch deck for the product using the design documentation from engineering.
	<b>Copilot in Outlook</b>	Create a promotional email using the product tagline and some bulleted items from the promotional plan.
	<b>Microsoft Copilot</b>	Command Copilot to create a series of social media posts based on the marketing content.

# Create a marketing pitch in record time



## Discover market research

In the Edge sidebar prompt

**Give me the latest information** on the top five markets for new widgets and the key competitors in those markets with a description of their products.



## Discover market trends

Select the Show data insights prompt in Copilot in Excel

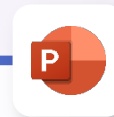
**Show data insights.**



## Create a promotion plan

Prompt Copilot in Word

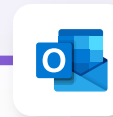
**Generate a promotion plan** for the widget market and include 10 potential taglines that would be appropriate for markets in Latin America.



## Create a pitch deck

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

**Create presentation from** [Word document link to Company widget design document.docx]



## Create an offer letter

Starting in a new email, prompt Copilot in Outlook

**Draft a promotional email** using the tagline "A better widget for all" and highlight the following product features listed below

- Lasts a long time
- Etc.



## Create social media posts

Start a new chat and prompt Copilot

**Create a series** of LinkedIn posts based on [Company Product Description](#) and [Company Marketing Plan](#).



# 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 [Company 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

Daichi must analyze the marketing data from the latest round of surveys. He uses Copilot to prepare charts so he can see the trends in the data.



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 Company



# Copilot for Microsoft 365 AI for Finance



Streamline financial decisions

**79% of people**  
are comfortable using AI  
for analytical work

# Complete an acquisition with Copilot for Microsoft 365



From forecasting to financial reporting to drafting stakeholder communications, Copilot works alongside finance teams, so their time is spent on the high-value tasks that make the biggest impact.

**79% of people** are comfortable using AI for analytical work



**Microsoft Copilot**

Summarize the due diligence information from the operations and legal team.



**Copilot in Excel**

Discover the organization's past financial information and verify revenue projections.



**Copilot in Teams**

Meet with the legal team and business development to decide how to structure the deal and get a list of the required legal notifications.



**Copilot in Word**

Add a section to the offer sheet discussing some conditions for the deal based on the meeting transcript.



**Copilot in Excel**

Refine the deal analysis based on the customer negotiations and changes in the economic environment.



**Copilot in PowerPoint**

Create a presentation summarizing the deal for the leadership team.



[→ Get Started with Copilot](#)

# Complete an acquisition with Copilot for Microsoft 365



## Summarize due diligence reports

From the Teams apps prompt Copilot in Microsoft Copilot

Summarize the information in [Company financial data](#), [Company operations analysis](#), [Company integration plan](#).



## Analyze financial data

Using a table to

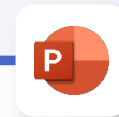
Show data insights.



## Meet with legal

In the recap tab for the meeting

List all of the legal notifications required for the offer sheet.



## Create an executive presentation

From a new presentation

Create presentation from [Word document link to Deal Summary.docx] Be sure to include a summary slide, a conditions slide, and a financials slide



## Refine Deal analysis

From the table in Excel prompt

Add a column to reduce the projected revenue by 3%



## Update offer sheet

From a new line select Draft with Copilot

Add a new section on the conditions for the deal based on [Legal team meeting transcript.docx](#)



# 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 the 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.



M365 Chat

**Summarize the information in** [Company financial data](#), [Company operations analysis](#), [Company 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 Company acquisition overview.docx]



Hillary is a financial analyst at Company



# Copilot for Microsoft 365 AI for IT



Capture actions to keep operations running

**76% of people**  
are comfortable using AI  
for administrative tasks

# Deploying a critical update with Copilot for Microsoft 365

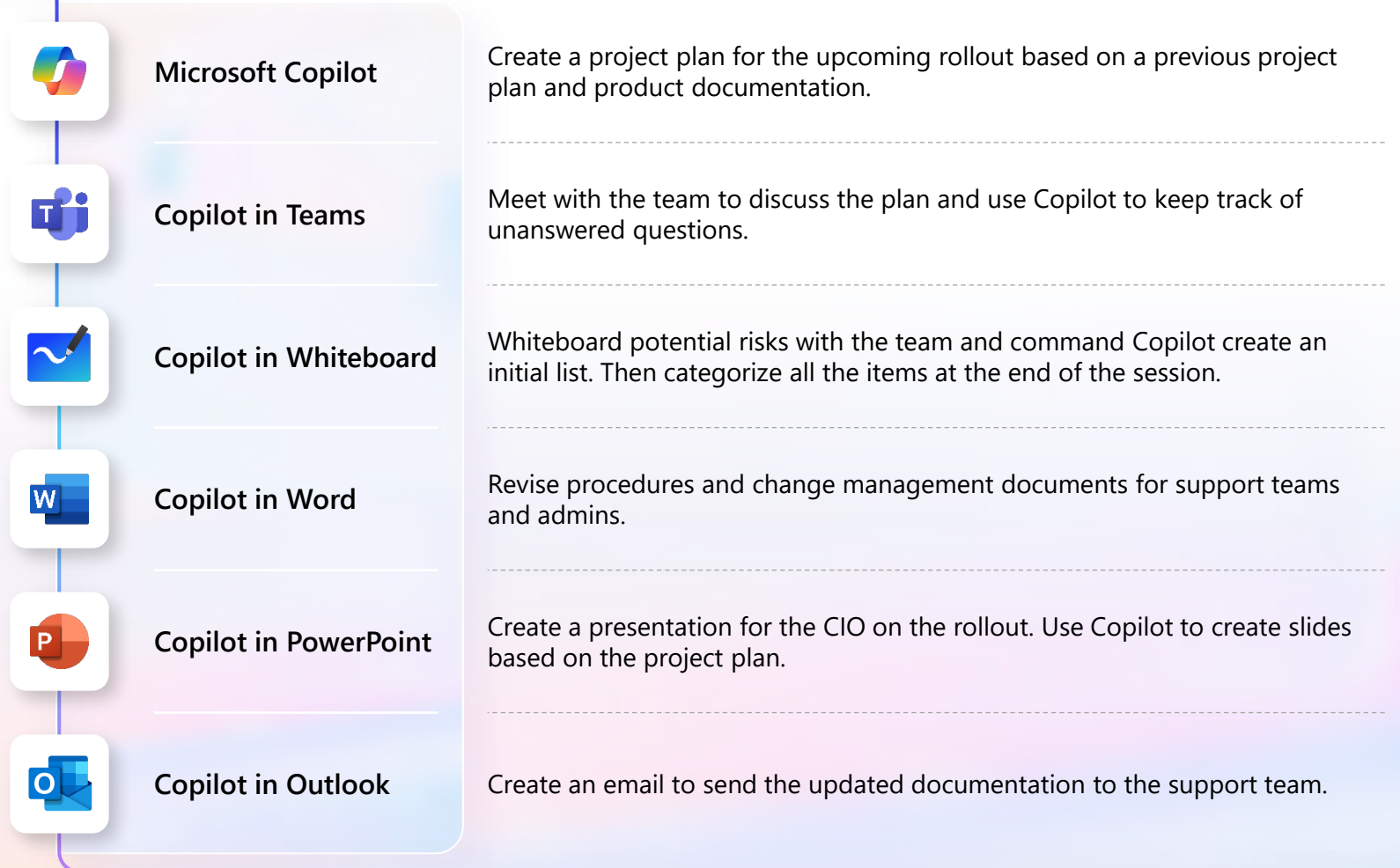


Planning for a critical update is essential, but there is never enough time. Copilot helps you take care of the simple tasks so you can focus on the details and avoid any issues.

## 76% of people

are comfortable using AI for administrative tasks

Microsoft WorkLab Work Trend Index, May 2023



→ [Get Started with Copilot](#)

# Deploying a critical update with Copilot for Microsoft 365



## Create a project plan

From the Teams apps prompt Copilot in Microsoft Copilot

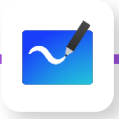
Summarize the information in [Company product documentation](#).



## Discuss the plan

From the meeting recap prompt Copilot in Teams

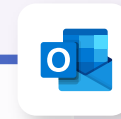
Summarize the meeting and list the action items discussed and their current status.



## Brainstorm risks

After collecting all of the ideas Click on Summarize in Copilot in Whiteboard

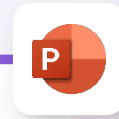
Summarize.



## Deliver the updates

Starting from a new email select Draft with Copilot

Draft a detailed email from the file [Company support procedures](#). Make the tone friendly.



## Create an executive update

Starting in a new presentation

Create a presentation from [Word document link to Company upgrade project plan.docx]



## Revise support procedures

On a new line of the procedure document click on the Draft with Copilot icon

Insert a paragraph on single sign on issue resolution using information from [Company product documentation](#).



# A day in the life of an IT administrator

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.



Microsoft 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 at the moment Will is able to make revisions to a project plan. He commands Copilot to fill in some missing sections.



Copilot in Word

**Create a paragraph** on system setting changes from the [Company system upgrade documentation](#)

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.



Microsoft Copilot

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

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

1:30 AM

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]



Will is an IT administrator at Company



# Thank You!

→ [Get Started with Copilot](#)

