



Copilot scenarios for Finance



Using Copilot in Finance

Copilot Workshop

Request information on the Copilot for Microsoft 365 online Workshop



Goals and challenges

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



Copilot can assist with ...

- Optimize your financial operations
- Contract review
- Collections coordination
- Accounting document evaluation
- Contract accounting guidance
- Update a guidance document
- Amendment comparisons
- Contract management
- Build a business case
- Launch a new Accounting app



Finance roles



Accountant



Analyst



Auditor



Operations



Procurement

Transform Finance processes



Planning & analysis



Procure to pay



Risk management & compliance

Microsoft Copilot opportunity to impact key departmental KPIs



Days sales outstanding

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



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.



Outsourcing spend

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



Revenue growth



Cost savings and avoidance



Improve employee experience