

A photograph of three office workers (two men and one woman) sitting around a table, smiling and looking at their laptops. The image is overlaid with a semi-transparent blue filter. The man on the left is wearing glasses and a checkered shirt. The woman in the middle is wearing a denim shirt. The man on the right is wearing a light-colored button-down shirt.

What's Possible with Microsoft 365 Copilot

How finance, sales, and operations
can leverage Copilot in their daily work

 proarch

MICROSOFT 365 COPILOT



Unleash creativity

Harness the power of AI so you never have to start from scratch



Unlock productivity

Let AI summarize actions for you, and optimize your time



Uplevel skills

Be better at what you're good at and master what you've yet to learn

Microsoft 365 Copilot for Finance

- 1. Analyze What Your Data Means:** CEOs depend on their finance leaders to provide updates on the business's performance at a moment's notice. This is much harder to do when you have no easy way to understand what your data tells you. Rather than spending time sifting through your data set to find trends and correlations, you can ask Copilot, which provides a starting point.
- 2. Build Reports:** With Copilot, you can pull together a report in minutes with a few prompts. For instance, you can ask Copilot to give you a breakdown of your sales for the quarter by region, and it'll generate a table for you in a new sheet. It's like having a Business Analyst in-house without the overhead. Copilot allows you to dig deeper into your data without actually modifying it.
- 3. Create and Format Data Visualizations:** Copilot can apply conditional formatting, such as color coding, to data visualizations to make trends and insights easier to spot. Instead of spending time adjusting each slide of your PowerPoint presentation, you can use natural language commands to apply any formatting needs to the entire slide deck. Spend less time preparing your report's presentation and more time interrogating the data itself and forming insights.
- 4. Generate What-If Scenarios and Financial Models:** Ask Copilot what-if scenarios based on the data in your Excel spreadsheet. In addition to scenario results, Copilot can create a financial model based on the variables you gave it and visualize it with a graph or table. Copilot's answers will include an "Explain" button, so you can double-check its work by asking it to break down how it created a model.

Microsoft 365 Copilot for Operations

- 1. Find Information Fast:** With Microsoft 365 Copilot, the operations department can store and access relevant documents, presentations, and images in one location. This means no more time-wasting, repetitive searches through different drives for the required information.
- 2. Process Mining:** Copilot has intelligence capabilities built-in that can help businesses monitor their processes to identify non-value-added tasks and automate them. Process mining analyses process metrics that assess the efficiency and effectiveness of any operational function within the organization. Rationalized procedures mean that resources are channeled to revenue-generating activities.
- 3. Task Management and Collaboration:** Productivity and virtual-assistant AI tools in Outlook can automate routine tasks, provide personalized recommendations, and streamline workflows to help optimize resources and drive cost reduction. Triage your inbox based on priority, get summaries for long email threads, and help with a response.
- 4. Zonal OCR for Document Management:** Copilot can digitize documents and images and instantly capture crucial information from those documents. OCR (Optical Character Recognition) capabilities take reading data off records to a new level. Zonal OCR is a form of OCR that reads specific regions on a document; this can automate many processes and means businesses can concentrate on revenue-generating tasks.

Microsoft 365 Copilot for Sales

- 1. Streamline Sales Process:** Microsoft 365 Copilot can help make the sales process more efficient and straightforward. Move prospects through the buyer journey with help crafting more professional email responses and turning proposals into customer-ready presentations. Edit proposals faster with suggestions on how to improve clarity, tone, and conciseness. Plus, make visualizations from Excel data to showcase the expected value.
- 2. Better Forecasting and Management:** Copilot can analyze the quarter's sales results and reveal critical trends. You can even go further to determine what's causing the trend, like a decline in sales. Ask what-if scenarios and create models to manipulate data based on sales projections.
- 3. Expand Customer Relationships:** AI tools in Excel analyze behavioral data from various sources, such as purchase history, browsing patterns, and social media activity, to provide insights into customer preferences and habits. Then use these insights to create targeted marketing campaigns, personalize product offerings, and optimize customer journeys, driving revenue and market growth.
- 4. Sales Coaching:** AI-powered transcription tools built into Teams can convert spoken language into written text, including summarizing the key points of the discussions. Turn meetings, conferences, and interviews into enablement material for sales onboarding and training.

Bring Together AI & Microsoft 365 With Confidence

ProArch's Microsoft 365 Copilot Readiness Check handles the prep work needed to leverage AI in the Microsoft 365 apps you rely on every day—Outlook, Teams, Excel, Word, and PowerPoint.

In under 4 weeks, you will understand the user groups that benefit most from Microsoft 365 Copilot, have a roadmap for deployment, and a Microsoft 365 environment primed and ready for Copilot.

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