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.

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.

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.

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.

**Copilot in Outlook
Copilot in Word**

Summarize and the latest conversations and assign action items.