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.

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.

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.

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?

Emma
works in
Tax & Customs