Finance | Build a Business Case

Potential benefits (Reduce Spend) (Access data more efficiently across systems)

1. Define opportunity for investment

Ask copilot to create a project brief from emails and other company documents.

Copilot

Support efficient review and understanding of the issues that need to be addressed with the investment.

2. Gather project information

Meet with the production team to learn about the various options available and gather financial information for the business case.

Copilot in Teams

Help ensure a productive meeting by using Copilot to suggest questions and clarify what people said. Use the recap for a summary and action items.

3. Gather financial data

Pull data from the financial system using a plug in built with Copilot Studio to estimate past cost of sales and revenues by year.

Copilot in Excel Copilot Studio in Copilot for Microsoft 365

Reduce the effort required to pull information from financial systems.

6. Stress test the business case

Use Copilot to test some options for the business case and identify the largest variances.

Copilot in Excel

Speed analysis by using Copilot to add formulas columns and create charts.

5. Produce summary report

Once the case flow analysis is complete use Copilot to turn the project brief into a set of slides for the executive presentation. Then add in the financial information.

Copilot in PowerPoint

Improve the quality of your presentations by using Copilot to revise content and organize the slides using Excel data.

4. Meet with chief economists

Get the latest economic forecast from the economist team to estimate future pricing and cost of materials. Organize the information in a table in Excel and use Copilot to produce charts showing trends in the data.

Copilot in Excel Copilot in Teams

Collaborate effectively across teams / functions (e.g., legal, transportation) in a secure way. Use data for decision making in meetings and discussion.