



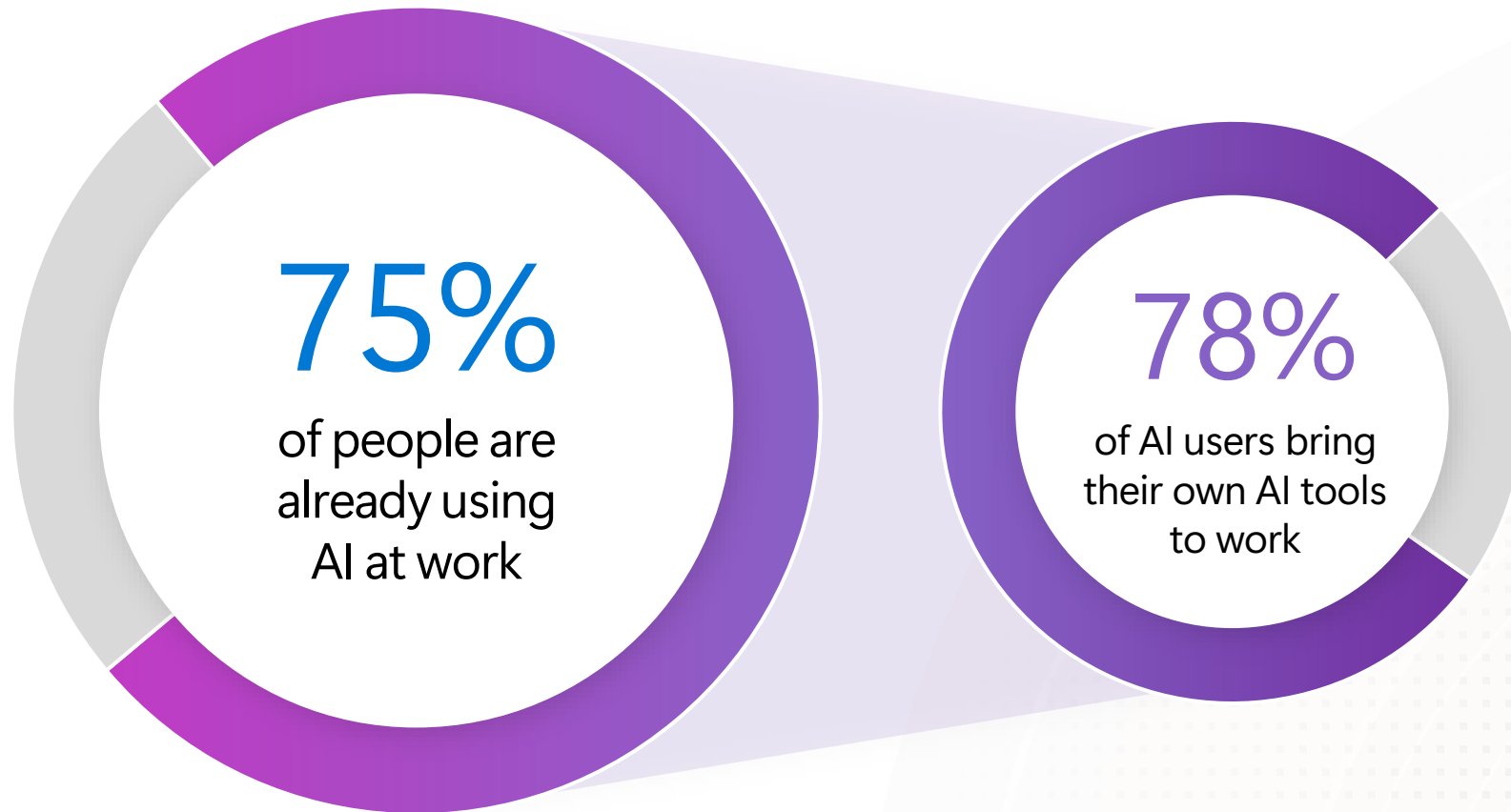
AI Powered Business with Copilot

Nader Amir-Parviz
Sr. Technical Specialist

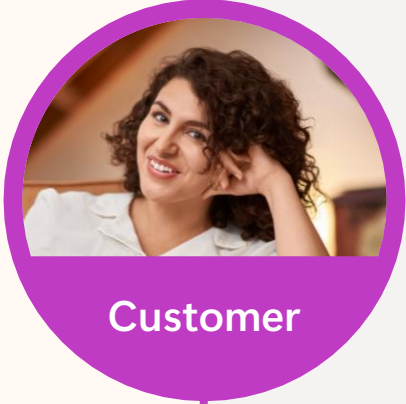
Rob Grimal
Principal Technical Specialist



AI has come to work



Today, buyers expect...



Self-service

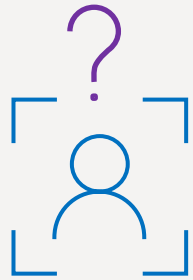


Personalized
experiences



Conversational
experiences

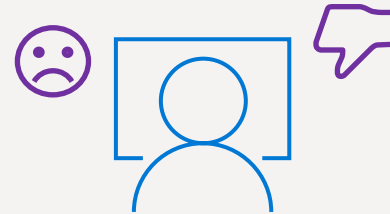
But delivering connected experiences is difficult...



Unable to **harness customer data** from every touchpoint to **improve the next**



Digital and human experiences are **disconnected**



Inability to take the **best actions** for the customer in **key moments**

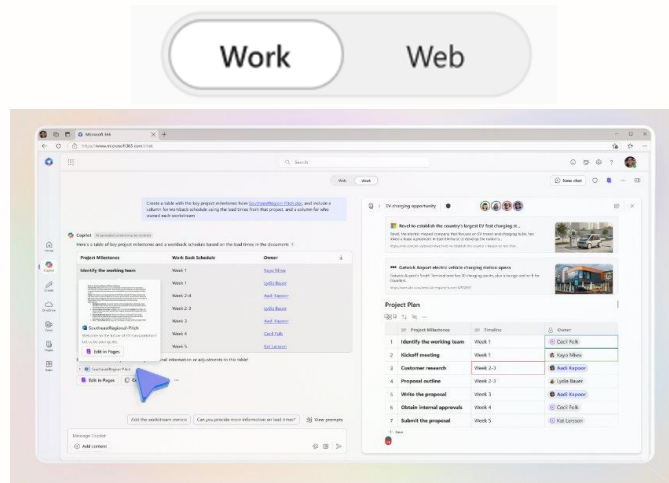


Departments and employees **act oblivious** to each other

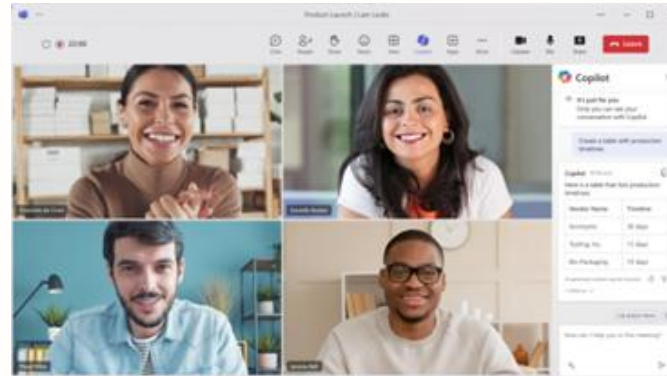


Microsoft 365 Copilot

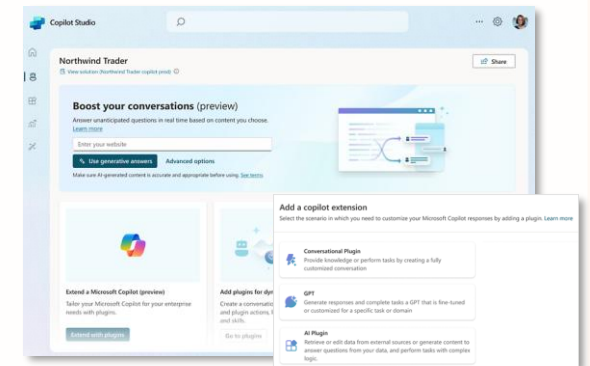
Your AI assistant for work



Business Chat
(work/web grounded)



Microsoft 365
Apps

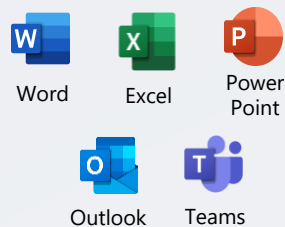


Copilot
Studio

Enterprise-grade security, privacy and compliance

Copilot for your organization

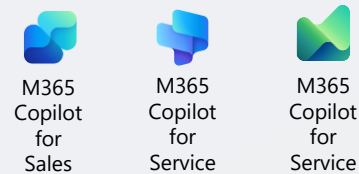
M365 Copilot



Make **users more productive** where they're already working in Outlook, Teams, Excel, PowerPoint and more.

Embedded in the flow of work in M365

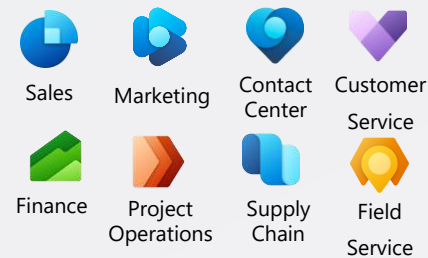
Role Based Copilots



Inline workflows **optimized for specific personas** and tasks and embedded in M365 applications your users know and love

Optimized out of the box for professional roles

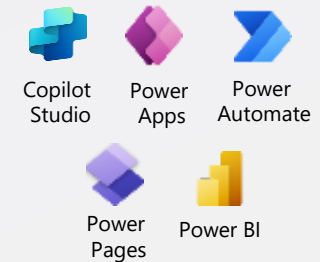
Dynamics 365 + Copilot



Full business applications for dedicated professionals, **centralize your data with Dataverse** and then power it with Copilot to remove toil and improve outcomes.

Fully customizable for specific processes

Power + Copilot



The fastest way to automate **every** business process and deliver custom Copilot applications – even atop existing SaaS apps and legacy systems.

Role Based Copilot Agents

Process-specific value optimized for specific personas and embedded in M365



Microsoft
Copilot for Sales

Bring sales insights and next-generation AI into the flow of work



Microsoft
Copilot for Service

Enhance customer experiences and boost service visibility & productivity



Microsoft
Copilot for Finance *(preview)*

Optimize processes and accelerate time to insight for financial analysis



Microsoft 365 Copilot

Microsoft 365 Copilot is included within Copilot role-based extension products. If you purchase Copilot for Sales, Service or Finance you get Copilot for Microsoft 365 **Included** within the license.

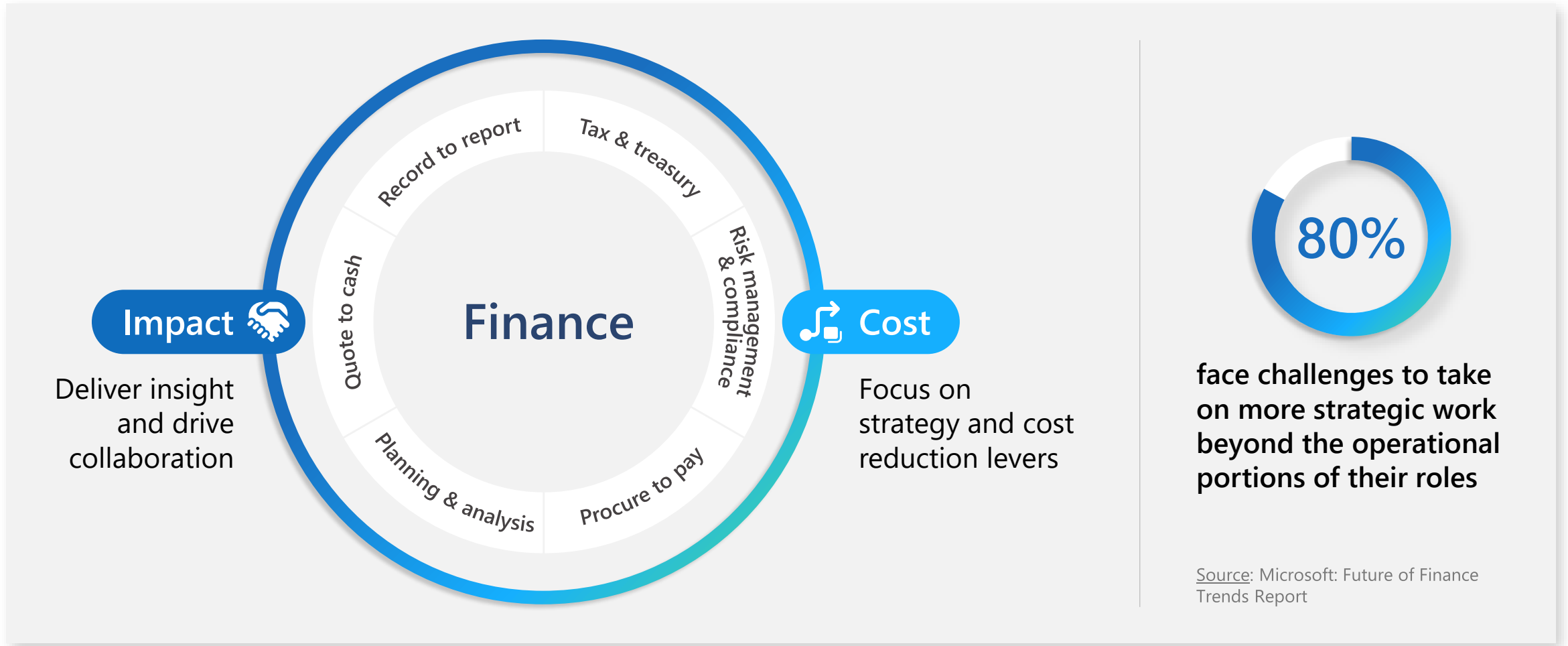


Microsoft Copilot Studio


Customize and build Copilots to meet your business needs

Note: Copilot for Microsoft 365 can also be purchased independently, and step-up licenses are available to upgrade when ready


The role of Finance is complex and evolving



Streamline financial processes with the AI assistant for **financial analysts, accountants, controllers, and treasury professionals.**



Microsoft 365 Copilot for Finance



Users that benefit most

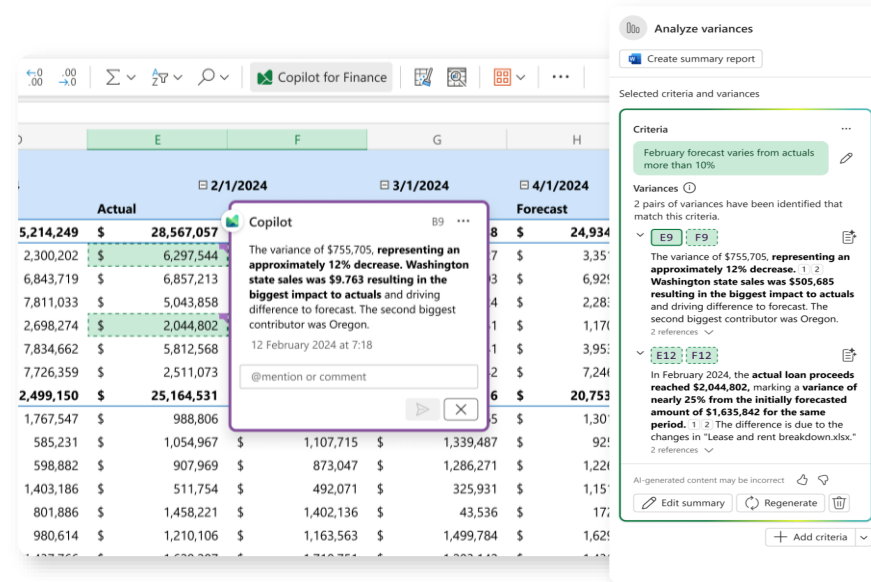
Financial Analysts, Accountants, Controllers, and Treasury Professionals

Out-of-the-box integrations

Integrations with SAP, Dynamics 365 Finance, Business Central

Sample use-cases

- Advanced Outlook Integrated Experiences; Draft emails, prep for meetings, and generate summaries – **all informed by ERP or Financial Systems**
- Use prebuilt workflows to streamline variance analysis and automate data reconciliation to accelerate the period closing process.
- Provides accurate and actionable commentary, financial reports, and insight sourced from various financial data sources packaged in a summary report.
- **Guided workflows and conversation scripts tailored for Finance Professionals**



The screenshot shows the Copilot for Finance interface integrated into an Excel spreadsheet. The spreadsheet displays a variance analysis table with columns for 'Actual' and 'Forecast' across different periods (2/1/2024, 3/1/2024, 4/1/2024). A Copilot chat window is open, providing a detailed explanation of a variance: 'The variance of \$755,705, representing an approximately 12% decrease. Washington state sales was \$9.763 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon. 12 February 2024 at 7:18'. A summary report panel on the right lists identified variances and their criteria, such as 'February forecast varies from actuals more than 10%' and 'Washington state sales was \$505,685 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon.'

- **Imagine finance professionals** making precise decisions based on data unique to their workflows
- Microsoft 365 Copilot for Finance **22% costs savings in handling time per account 20 minutes/account**
- **Oracle, Sage, Infor and others using Custom Connector**
- Expected Outcomes:
 - **Accelerate Impact:** Deliver new insight and reduce the time it takes to compile and analyze data
 - **Reduce Cost:** Drive efficiency by applying AI to optimize manual, labor-intensive processes

Financial period close: streamline data reconciliation

Accelerate time-to-close and reduce costs with Copilot for Finance for data reconciliation

Leverage intelligent data structures comparisons and guided troubleshooting in Excel

Analyze results with an auto-generated report summary that highlights discrepancies

Easily troubleshoot and resolve any discrepancies with recommendations and actions

The interface displays a reconciliation process. On the left, a table shows 'Unmatched transaction (1)' and 'Potentially matched transactions (5)'. The 'Potentially matched transactions' table has the following data:

Document date	Net due date	Reference	Amount in doc. currency
*	11/4/2023	2121681058	
*	11/4/2023	2121702978	
*	11/4/2023	2121764113	
*	11/2/2023	2121786541D	2
*	10/15/2024	2121799904D	

Below the table is a 'Totals' section with a 'Reconciliation report summary' box containing the following information:

- Reconciliation Date: 02-28-2024
- Number of Invoices: 358
- Matched transactions: 357
- Discrepancy: 1 invoice
- The reconciliation process revealed that invoice **NWT-0434545456** is present in Northwind Traders' invoice list but not in Fabrikam's invoice list. **The discrepancy is due to the missing invoice in Fabrikam's records.**

On the right, a 'Reconcile data' sidebar shows a progress indicator and instructions: 'Select at least two columns, one of each type, for each table'. It lists 'Copilot suggestion' for 'Table 1' (Fabrikam vendor invoice list) with columns 'Invoice number' and 'Invoice amount', and 'Table 2' (Fabrikam customer invoices) with columns 'Invoice ID' and 'Invoice base amount'. At the bottom of the sidebar are buttons for 'Adjust', 'Regenerate', and 'Dismiss', and a footer with 'Back', 'Next', and 'Cancel' buttons.

Quote to cash: accelerated collections

Reduce costs with Copilot for Finance for customer interactions

Review customer financial standing directly within Outlook

Share customer balance statements and invoice copies directly from Outlook

Summarize and save customer interactions for accurate and contextual collaboration

The screenshot displays an Outlook email interface. The email is from Kristin Watson, dated 2/23/2024, 9:55 AM. The recipient is Jane Cooper. The subject is "Outstanding invoices". The email body contains a message from Devon Lane, Accounts Receivable Manager at Northwind Traders, regarding a \$250,000 balance with \$50,000 due as of 2/14. Below the email content, there is an AI-generated summary section titled "Inform Fabrikam that they have an o..." with a "Keep it" button and options to "Discard", "Regenerate", or "Options". To the right of the email, there is a sidebar with several panels: "Finance insights" listing Jane Cooper as the primary contact and Fabrikam's specialization; "Customer" showing 358 overdue invoices and Fabrikam (US) supply chain; "Contact" showing Jane Cooper as the account manager; and "Note" with a "New note" button.

Planning & analysis: understanding variances

Accelerate impact with Copilot for Finance

Review anomalies, risks, and unmatched data results with annotations and supporting data

Follow-up with suggested contacts and auto-summarized analysis commentary

Turn data into presentation-ready visuals and reports ready to be shared across Outlook and Teams

The image shows a screenshot of a Microsoft Excel spreadsheet with a Copilot for Finance overlay. The spreadsheet displays financial data for February 2024, comparing actual values to forecasted values. A Copilot chat window is open, providing an analysis of a variance in Washington state sales. To the right, a summary report panel titled 'Analyze variances' lists the criteria and variances identified by Copilot.

	2/1/2024	3/1/2024	4/1/2024
Actual			Foreca
5,214,249	\$ 28,567,057		8 \$
2,300,202	\$ 6,297,544		7 \$
6,843,719	\$ 6,857,213		3 \$
7,811,033	\$ 5,043,858		4 \$
2,698,274	\$ 2,044,802		1 \$
7,834,662	\$ 5,812,568		1 \$
7,726,359	\$ 2,511,073		2 \$
2,499,150	\$ 25,164,531		6 \$
1,767,547	\$ 988,806		5 \$
585,231	\$ 1,054,967	\$ 1,107,715	\$ 1,339,487
598,882	\$ 907,969	\$ 873,047	\$ 1,286,271
1,403,186	\$ 511,754	\$ 492,071	\$ 325,931
801,886	\$ 1,458,221	\$ 1,402,136	\$ 43,536
980,614	\$ 1,210,106	\$ 1,163,563	\$ 1,499,784

Copilot B9 ...

The variance of \$755,705, representing an approximately 12% decrease. Washington state sales was \$9.763 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon.

12 February 2024 at 7:18

@mention or comment

Analyze variances

Create summary report

Selected criteria and variances

Criteria

February forecast varies from actuals more than 10%

Variances

2 pairs of variances have been identified that match this criteria.

E9 F9

The variance of \$755,705, representing an approximately 12% decrease. Washington state sales was \$505,685 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon.

2 references

E12 F12

In February 2024, the actual loan proceeds reached \$2,044,802, marking a variance of nearly 25% from the initially forecasted amount of \$1,635,842 for the same period. The difference is due to the changes in "Lease and rent breakdown.xlsx."

2 references

AI-generated content may be incorrect

Edit summary Regenerate




+ Add criteria

The role of service representatives is getting harder


43%

of [customer service] reps reported they were overwhelmed by the number of systems and tools needed to complete work¹




-  Increased workload and customer demands
-  Disparate tools and knowledge sources
-  Systems and tech modernization hurdles

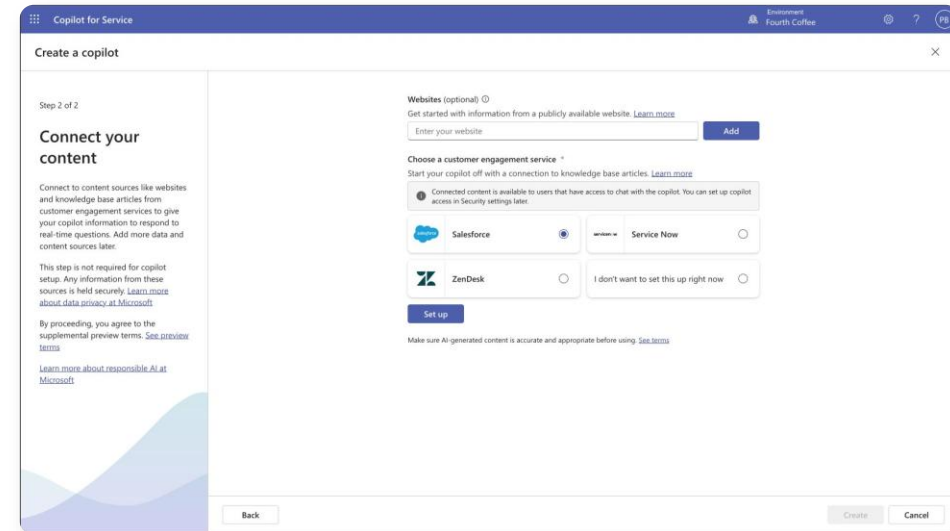
Modernize your contact center with a copilot designed for **customer service agents**



Microsoft 365 Copilot For Service



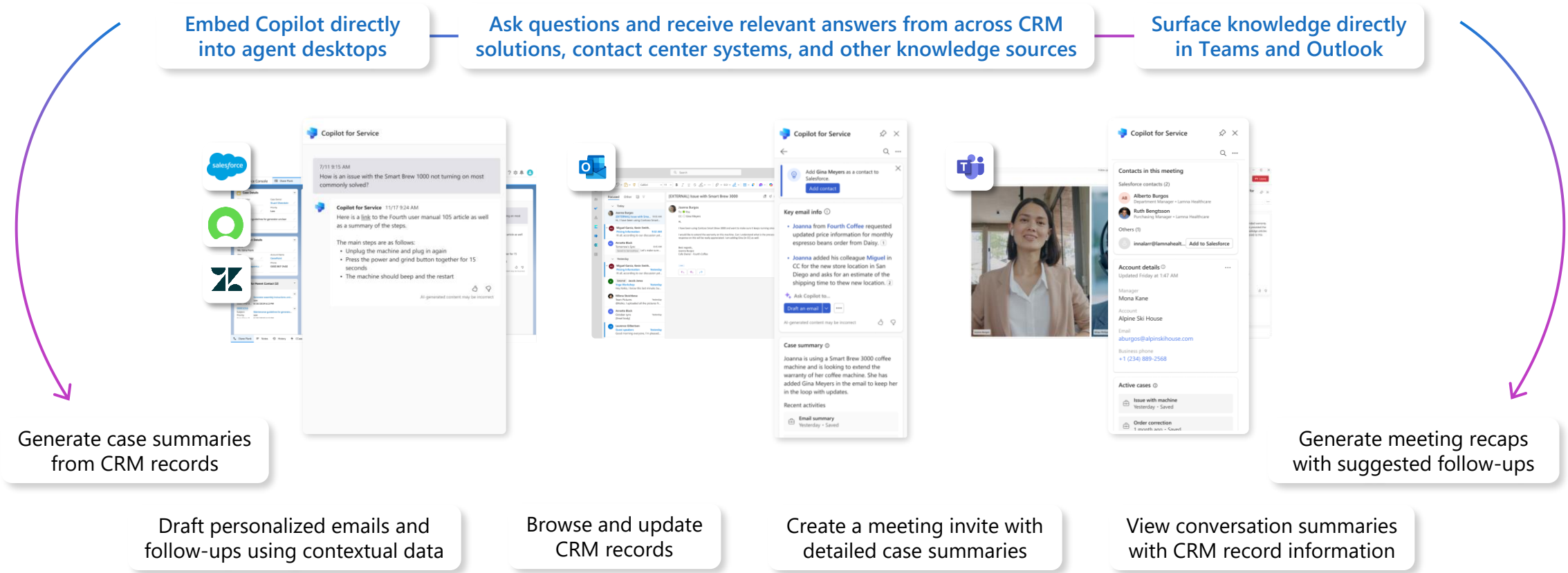
Users that benefit most	Customer Service Agents
Out-of-the-box integrations	Salesforce, Service Now, Zendesk
Sample use-cases	<ul style="list-style-type: none"> • Get answers from Copilot for Service in CRM console • Summarize emails in Outlook helping service reps catch up on email conversations • In meetings, access case summary and the ability to view/edit CRM records • Summarize cases in embed agent and in Outlook that automatically includes all the activities from the case • Draft email replies in embeddable agent and Outlook analyzing CRM data, internal knowledge, and past cases



- **Imagine service agents** reducing the time it takes to draft customer replies
- Microsoft 365 Copilot service agent **50% reduction in volume of agent contacts**
- Out-of-the-box integrations with **Salesforce, ServiceNow, and Zendesk**
- **Key Metrics:**
 - **Agent Productivity:** Enhance agent efficiency
 - **Higher Resolution Rates:** Increase first-contact resolutions
 - **Operational Savings:** Reduce operational expenses

Microsoft 365 Copilot service agent

Maximize agent productivity in the flow of work.



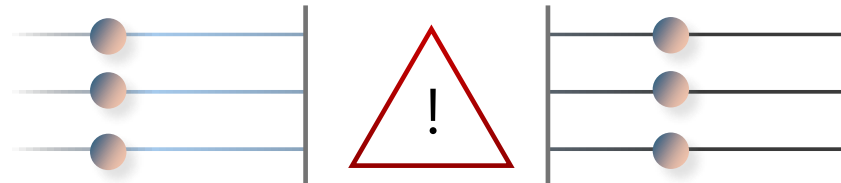
Experienced in Microsoft 365 and connects to your CRM and ERP systems

This demo is intended solely to showcase the capabilities of Microsoft 365 Copilot service agent in-product experiences. Any references to Salesforce are purely illustrative and do not imply any form of partnership or endorsement between Salesforce and Microsoft. Please use this demo as a guide to understand the functionalities of the Microsoft 365 Copilot service agent product.

Disconnected tools tie sellers up with busywork



Systems of productivity



System of record

Sellers spend only **32%** of their time on selling¹

¹"Selling in the Age of Ceaseless Change," CSO Insights. 2019.

Close more deals with the AI assistant designed for **sellers, sales managers, and seller operations.**



Users that benefit most

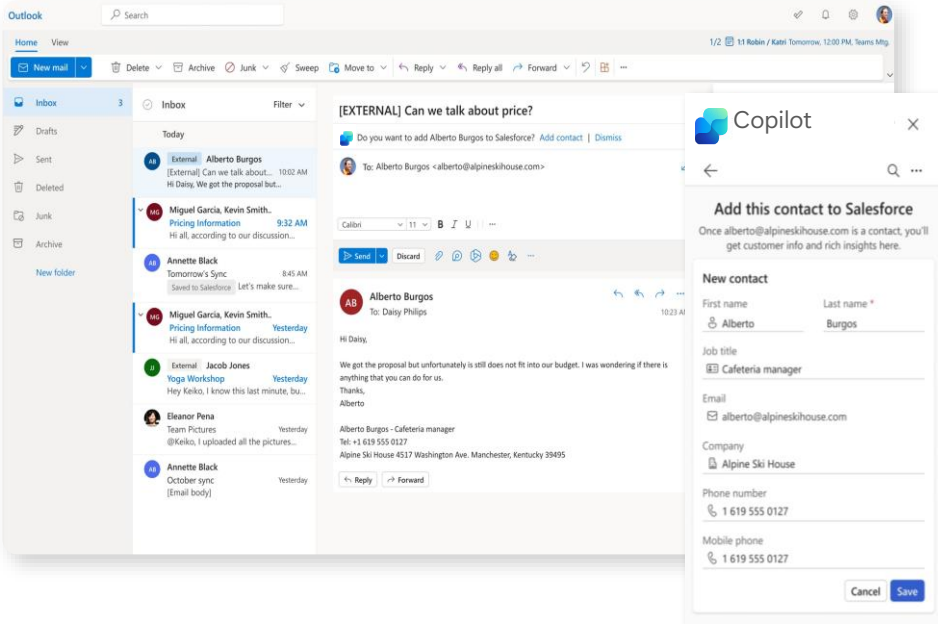
Sellers, Sales Managers, Sales Operations

Out-of-the-box integrations

**Salesforce Sales Cloud
Microsoft Dynamics 365 Sales**

Sample use-cases

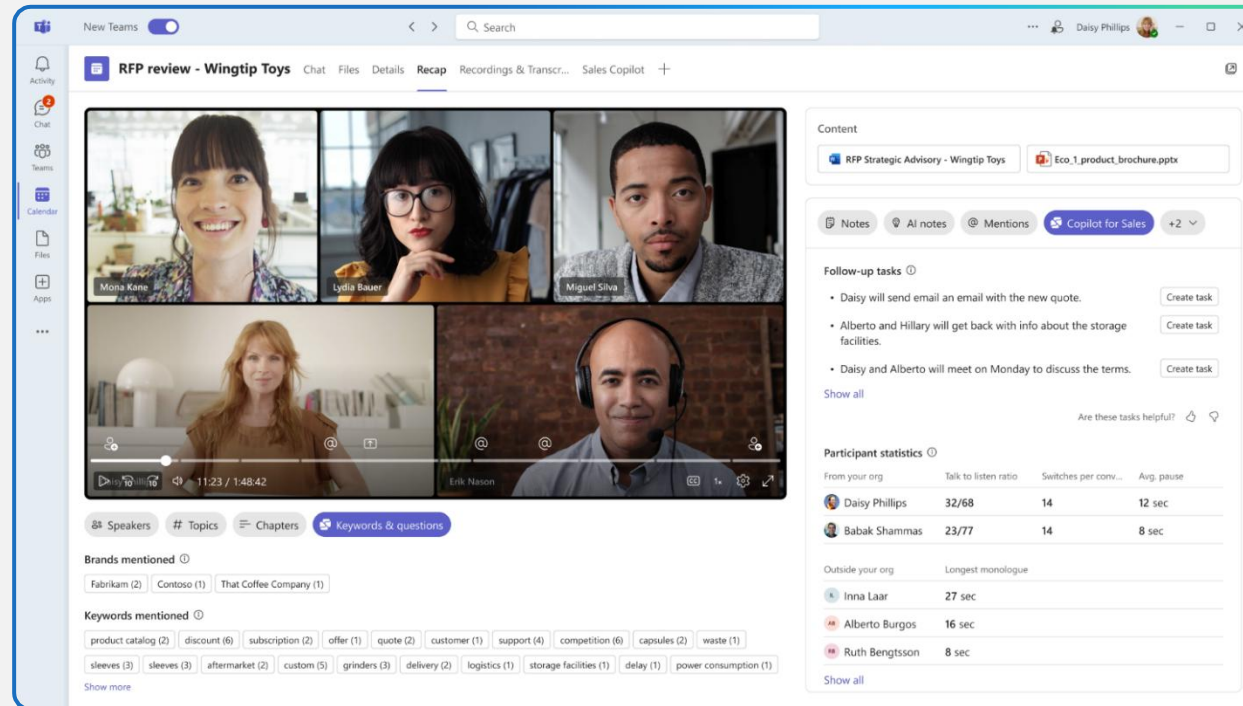
- Draft email replies using CRM data and insights
- Summarize emails with customer context from CRM and see sales-specific suggested actions
- Draft a document (e.g., sales brief) using CRM records as source
- In meetings, get real-time sales tips and opportunity summary from CRM
- Summarize meeting; Add action items as tasks in CRM directly from Teams, analyze sales keywords



- **Imagine sellers** unlocking insights from customer, prospect, and deal data
- Microsoft 365 Copilot sales agent **85% of sellers report faster completion of one or more tasks**
- Out-of-the-box integration with **Salesforce**
- **Key Metrics:**
 - **Higher CSAT:** Achieve superior customer satisfaction.
 - **Faster Sales Cycles:** Reduce time-to-close for quicker deal wins.
 - **Seller Productivity:** Increase effectiveness and efficiency.


Microsoft Copilot for Sales

Next-generation AI assists sales teams with tedious tasks like catching up on pipeline, updating CRM data, preparing for meetings, and analyzing calls so they can focus on closing the deal.




 View opportunity summary

 Analyze sales conversations

 Draft a proposal

 Create a revenue data chart

 Create CRM tasks from a meeting

 Update opportunity stage


 Show conversion rate

 Create a pitch presentation



Copilot for Sales is experienced in Microsoft 365 and connects to your CRM system

Day in the Life of a Seller


Summarize documents from customer

 Microsoft 365 Chat




Compare Agreements, speeding up document analysis.


Pursue opportunity

 Microsoft Outlook




Generate an email to customer with **CRM details**,


Automate data entry

 Microsoft Outlook




Seamlessly **add a contact to CRM** from Outlook email


Prepare for a meeting

 Microsoft Outlook




From calendar, view **opportunity summary from CRM**. Share opportunity details via Teams.


Review meeting and conduct follow-ups

 Microsoft Teams




Summarize meeting with **sales-specific** keywords and **generate follow-up tasks**.

Prepare offer value document for customer

 Microsoft Excel

Generate Charts and Visualizations from *DrivePaperlessInvoiceHistory.xls*

Start your AI journey

Learn more

[Microsoft 365 Copilot](#)

[Copilot Studio](#)

[Dynamics 365](#)

Explore

Participate in an envisioning workshop or an [MTC session](#)

[Customer Stories](#)

Get started

[Start Your Copilot Journey](#)

[Copilot Success Kit](#)



Thank you.