



REAL-WORLD BUSINESS USES OF MICROSOFT COPILOT



You've probably heard about AI and how it's changing how we work. Maybe you've read articles about how other companies are using AI tools to be more productive and efficient.

But here's the real question: how can you use AI in your business?

Microsoft has made it incredibly simple to harness AI with Microsoft Copilot, which integrates directly into tools you're likely already using, such as Word, Excel, and Teams.

In this short guide, we'll break down some practical ways businesses are using Microsoft Copilot, focusing on real-world scenarios. By the end, you'll have a clear picture of how Copilot can make your workday easier. And if you need help getting started, we're here to guide you.

MICROSOFT WORD

Executive Summaries

Some documents are packed with details, such as project plans or lengthy decision-making reports. But what if you need only a summary? Copilot in Word can distil a document into just the key points, including any final decisions made.

How it works:

Open your document in Word, click the Copilot icon in the top-right corner, and type *"Summarize the document."* You'll instantly get a concise summary you can use for meetings or presentations.

Find References

Navigating long documents can be frustrating when you're searching for specific information. For example, if you're in construction and reviewing building codes, you can use Copilot to locate all mentions of a particular rule.

How it works:

Open the document, and ask Copilot, *"Find all references to maximum allowable brick overhang on a concrete slab."* It will highlight the relevant sections with links so you can easily read them in context. This saves time and reduces the risk of missing important details.

Drafting proposals in minutes

Imagine you're a marketing agency responding to a client's Request for Proposal (RFP). Instead of starting from scratch, Copilot can draft a detailed proposal based on your instructions.

How it works:

In Word, ask Copilot, "Create a marketing proposal for increasing online sales for a retail client, including a timeline, SEO strategies, and budget placeholders." Copilot delivers a ready-to-edit draft, saving you hours of work.

MICROSOFT TEAMS

Meeting summaries and decisions

Meetings often involve a lot of back-and-forth discussions, and it's easy to lose track of key points or final decisions. Copilot can step in and provide clarity.

How it works:

During or after a meeting, ask Copilot, *"What was the final decision regarding the Jones account?"* or *"What are the open items, and who is working on them?"* Copilot will create a discussion summary, including action items assigned to each team member.

Actionable insights

Copilot can help you focus on what's important if a chat or discussion in Teams becomes cluttered.

How it works:

You can type, *"Get key information from the chat."* and Copilot will pull out tasks, deadlines, and other critical details, giving you a clean breakdown to share with the team.

MICROSOFT EXCEL

Analyze sales data

Let's say you've got a spreadsheet with sales data for multiple regions, but you're unsure how to make sense of it all. Copilot in Excel can handle this for you.

How it works:

Ask Copilot, *"Summarize sales trends over the past six months by region and create a chart."* Within seconds, it generates a summary and a visual chart, helping you quickly identify which regions are thriving and which need attention.

Tracking supplier payments

Managing supplier invoices can become overwhelming, especially if you're dealing with dozens of vendors with varying payment terms. Copilot in Excel can help you track payments, identify overdue invoices, and even suggest a payment prioritization strategy.

How it works:

Import your supplier invoice data into Excel, then ask Copilot, *"Highlight all overdue invoices and calculate the total outstanding balance."* Copilot will organize the data, identify which suppliers are overdue, and provide a summary to help you decide which invoices to prioritize based on payment terms or amounts due.

Managing inventory reports

If you run a business with physical products, staying on top of inventory levels is critical. Copilot can help summarize inventory reports and identify trends.

How it works:

In Excel, upload your inventory data and ask, *"Highlight items with low stock and calculate the average time to restock for each category."* Copilot creates a report that helps you plan your next order.

Streamlining customer feedback

If your business collects customer feedback in an Excel spreadsheet, Copilot can help analyze it to identify patterns and actionable insights. For instance, let's say you run a chain of coffee shops and want to understand why customers leave complaints.

How it works:

Use Copilot in Teams to analyze feedback data and ask, *"What are the top three issues customers mentioned in the past month?"* Copilot summarizes the complaints and helps you prioritize solutions.

MICROSOFT PLANNER AND OUTLOOK

Planning a product launch

Launching a new product involves multiple steps: design, production, marketing, and more. Copilot can help you create a detailed timeline for your team.

How it works:

In Planner, ask Copilot, *"Create a 12-week product launch timeline with tasks for design, production, marketing, and distribution."*

Copilot organizes the timeline and assigns tasks to the right people automatically.

Writing customer follow-up emails

After a webinar or event, following up with attendees is key to keeping them engaged. Copilot can draft professional, personalized emails in seconds.

How it works:

In Outlook, ask Copilot, *"Draft a follow-up email thanking webinar attendees and including a link to schedule a consultation."* It

creates an email template with placeholders for names and additional details, saving time and effort.

WHY WORK WITH US?



XSolutions®

Microsoft Copilot is a powerful tool, but implementing it effectively can feel overwhelming if you're unfamiliar with its features. That's where we come in. As your managed service provider, we'll help you integrate Copilot into your workflows and get the most out of AI tools in Microsoft 365.

Ready to see how Copilot can work for your business? Reach out to us today, and let's make AI work for you.



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