



Microsoft 365  
Copilot

# Say Hello to AI

A Practical Guide to Copilot Chat Across Departments

E-book





# Table of contents

**01**

The new  
work reality

**02**

AI that  
scales with your  
business

**Departments**

**03** Customer Service

**04** Finance

**05** Human Resources

**06** IT

**07** Legal

**08** Marketing

**09** Sales

**10**

A catalyst  
for business  
transformation

01

# The new work reality

The pace of business is accelerating, opening new opportunities for innovation, agility, and impact. As work becomes more dynamic, employees across every function are rising to meet evolving expectations and priorities. But to unlock their full potential, they need support navigating the complexity—streamlining routine tasks, staying focused amid constant inputs, and shifting from reactive to strategic execution.

AI is emerging as a critical lever—helping individuals focus on higher-value work, accelerate decision-making, and improve the employee experience. In fact, according to the 2025 Work Trend Index from Microsoft, **82%** of leaders say they're confident that they'll use digital labor to expand workforce capacity in the next 12–18 months—not to replace people, but to support them with tools that reduce friction, increase focus, and amplify their impact.<sup>1</sup>

This e-book shows how Microsoft 365 Copilot Chat and agents can help teams across your organization work smarter, move faster, and focus on what matters most—with real examples and practical guidance to accelerate each team's strategic **AI transformation**.

02

# AI that scales with your business

Copilot Chat is a secure, accessible way to bring AI into your organization. Included with Microsoft 365 business subscriptions, it helps employees boost productivity with simple prompts—drafting content, answering questions, generating ideas, and even building custom agents. It's a safe, user-friendly way to explore AI, build confidence, and unlock everyday efficiencies.

Microsoft 365 Copilot builds on this foundation with a more integrated, enterprise-ready experience. It brings AI directly into the Microsoft 365 apps your teams already use—Word, Excel, Outlook, Teams, PowerPoint, and more. With this upgrade, Copilot Chat connects beyond the web to your organization's data in a secure, compliant way, enabling advanced automation, personalized insights, and seamless collaboration at scale.

From IT and HR to marketing, sales, finance, legal, and customer service, Copilot Chat empowers teams to shift from reactive to strategic, from overwhelmed to innovative. This isn't just about working faster—it's about unlocking new potential across teams in your organization.

Let's take a closer look at the key functions that are transforming how teams across your organization can get work done.

# Copilot Chat in Customer Service

Customer service teams work hard to manage high volumes of inquiries, but the pace and complexity can make it challenging to respond quickly and consistently.

## Example

A support agent might spend 10–15 minutes crafting a thoughtful reply to a single customer, leaving many tickets unresolved.

## Shift

Copilot Chat can enable faster, more personalized customer service by analyzing inquiries and generating responses. It improves response time and service quality by generating quick, personalized replies and identifying recurring issues.

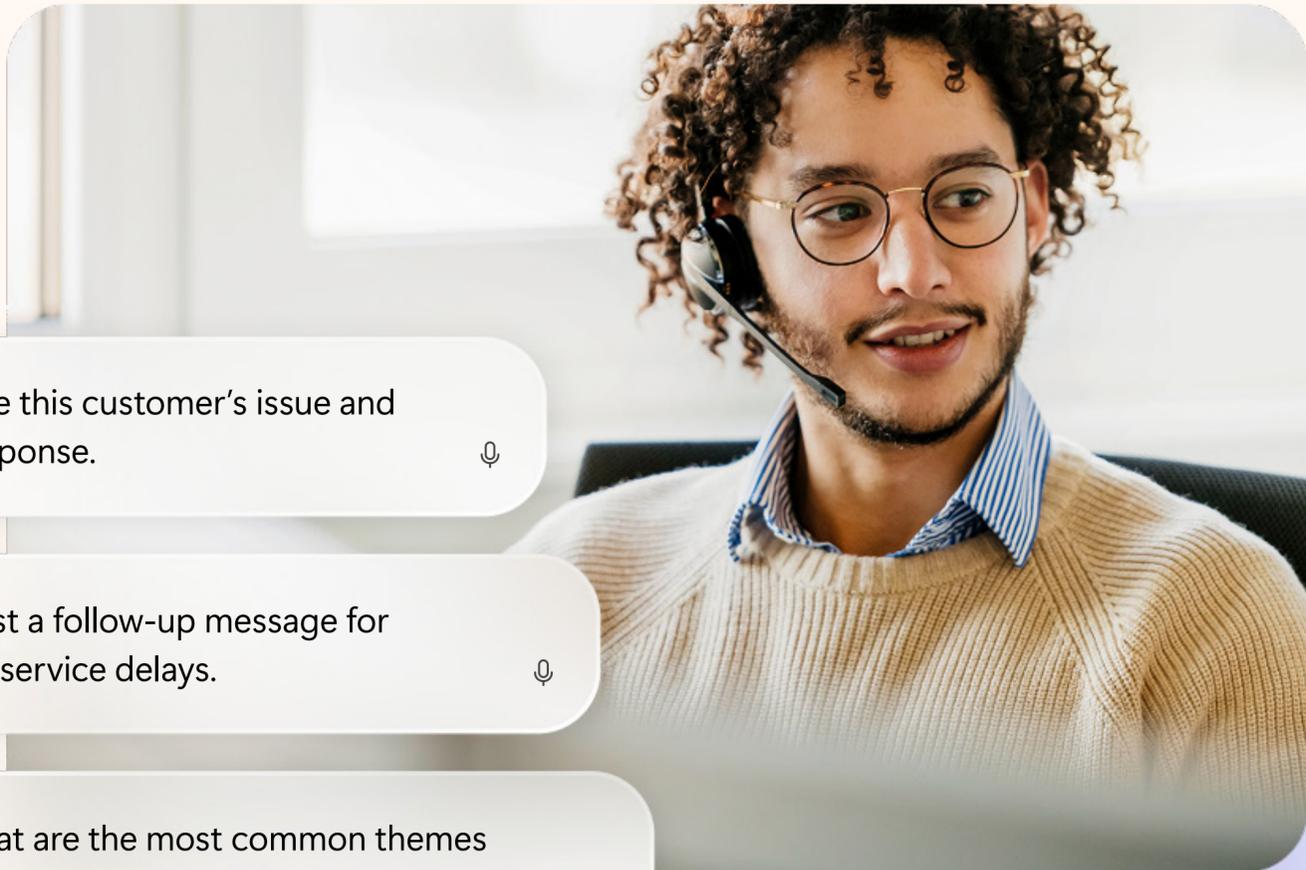
## Key capabilities

- Analyzes and prioritizes incoming inquiries
- Drafts personalized responses instantly
- Identifies trends and recurring issues

## Outcome

With repetitive tasks handled, customer service teams can focus on providing exceptional service and building stronger relationships.

Customer service teams can use prompts like:



+ Summarize this customer's issue and draft a response. 

+ Suggest a follow-up message for recent service delays. 

+ What are the most common themes in today's incoming messages? 

# Copilot Chat in Finance

Finance teams manage complex responsibilities like report generation and budget planning, but the repetitive nature of these tasks can slow down decision-making and limit time for forward-looking analysis.

## Example

A financial analyst might spend hours compiling data and double-checking calculations for a budget review.

## Shift

Copilot Chat can automate financial processes and provide real-time insights. It can analyze financial data and generate reports, saving time for strategic financial planning.

## Key capabilities

- Automates report generation and budget planning
- Analyzes financial data and identifies insights
- Drafts summaries, forecasts, and presentations

## Outcome

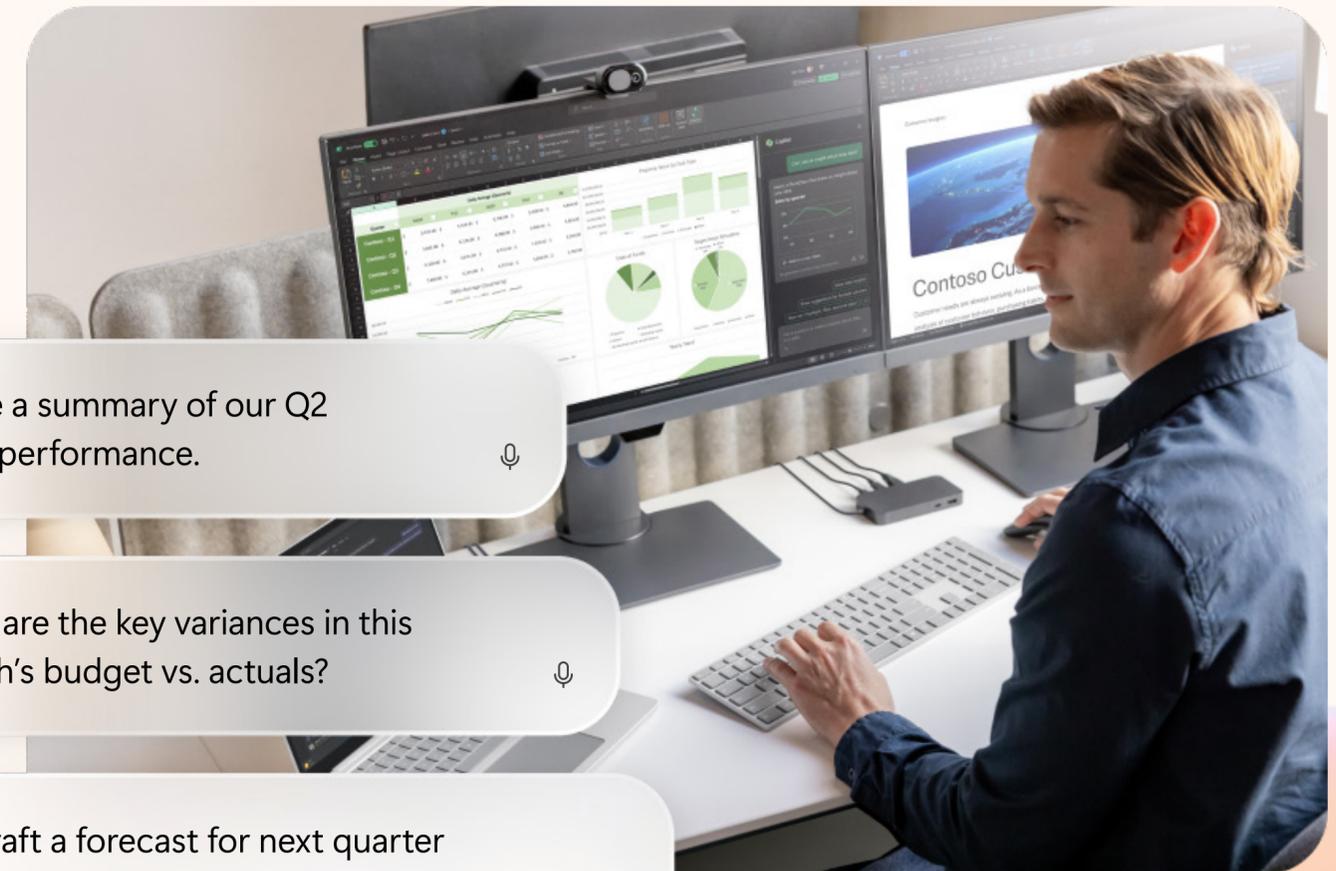
With repetitive tasks automated, finance teams can focus on high-impact work like scenario planning and strategic investment decisions.

Finance teams can use prompts like:

+ Generate a summary of our Q2 financial performance.

+ What are the key variances in this month's budget vs. actuals?

+ Draft a forecast for next quarter based on current trends.



# Copilot Chat in Human Resources

HR professionals handle a wide range of essential responsibilities—like reviewing resumes and generating reports—which can make it challenging to prioritize strategic initiatives such as talent development and culture building.

## Example

An HR manager might spend hours gathering performance data and feedback to prepare for a talent review.

## Shift

Copilot Chat can help HR professionals automate documentation and retrieve relevant data quickly. It can deliver contextual responses from emails, meeting notes, and feedback forms, helping HR teams focus on strategic priorities.

## Key capabilities

- Automates documentation and reporting
- Analyzes employee feedback and performance data
- Drafts HR communications and development plans

## Outcome

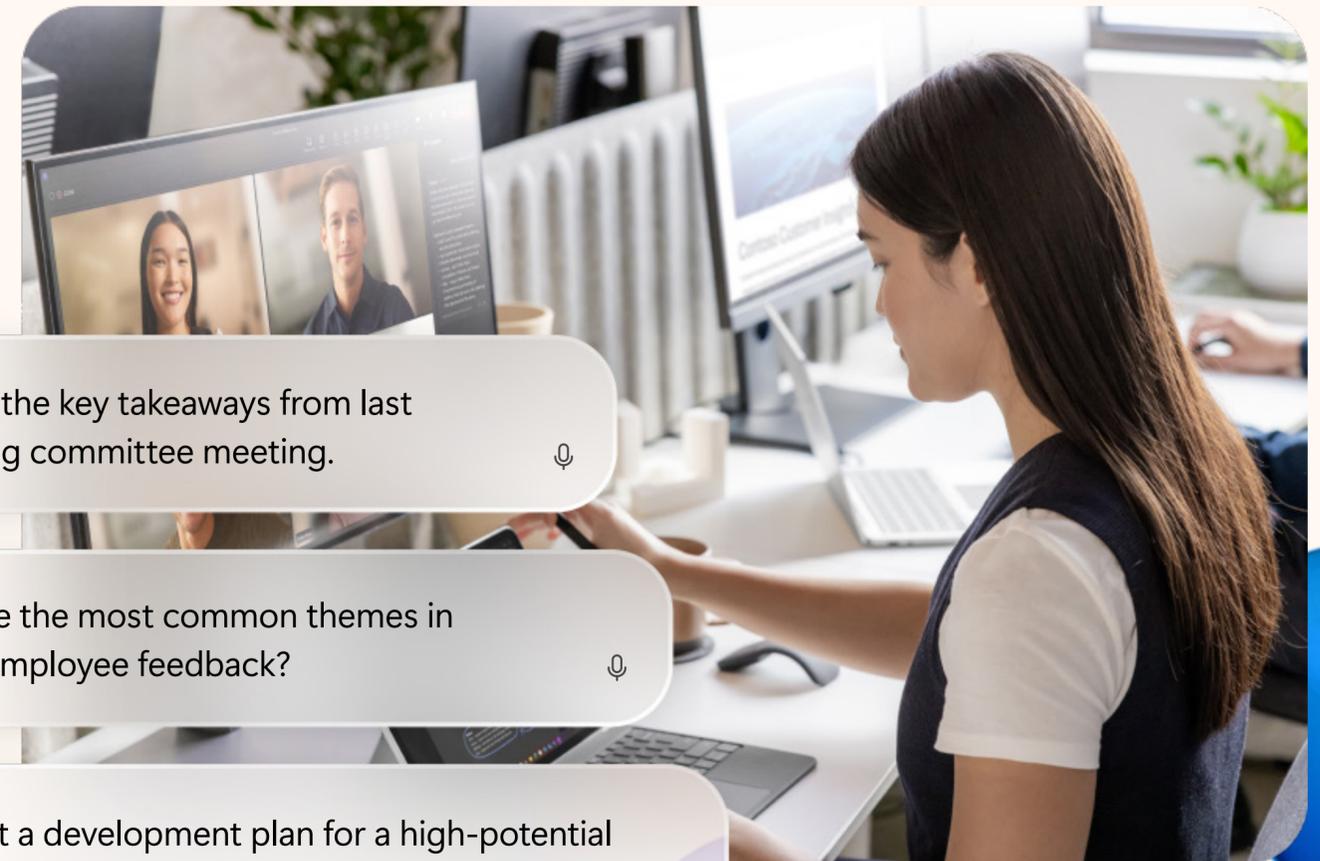
With routine tasks handled efficiently, HR can focus on employee development, culture, and strategic decision-making.

HR teams can use prompts like:

+ Summarize the key takeaways from last week's hiring committee meeting.

+ What are the most common themes in recent employee feedback?

+ Draft a development plan for a high-potential employee based on recent reviews.



# Copilot Chat in IT

IT teams manage critical tasks like infrastructure, support, and documentation—work that’s essential but often leaves limited space for innovation and long-term planning.

## Example

An IT admin might spend hours compiling system performance reports or answering routine user queries.

## Shift

Copilot Chat can streamline IT workflows by providing contextual, real-time insights. It can consolidate data from emails, tickets, and system logs to provide accurate, actionable insights.

## Key capabilities

- Summarizes technical reports and incident logs
- Automates documentation and compliance tracking
- Assists with project planning and stakeholder communication

## Outcome

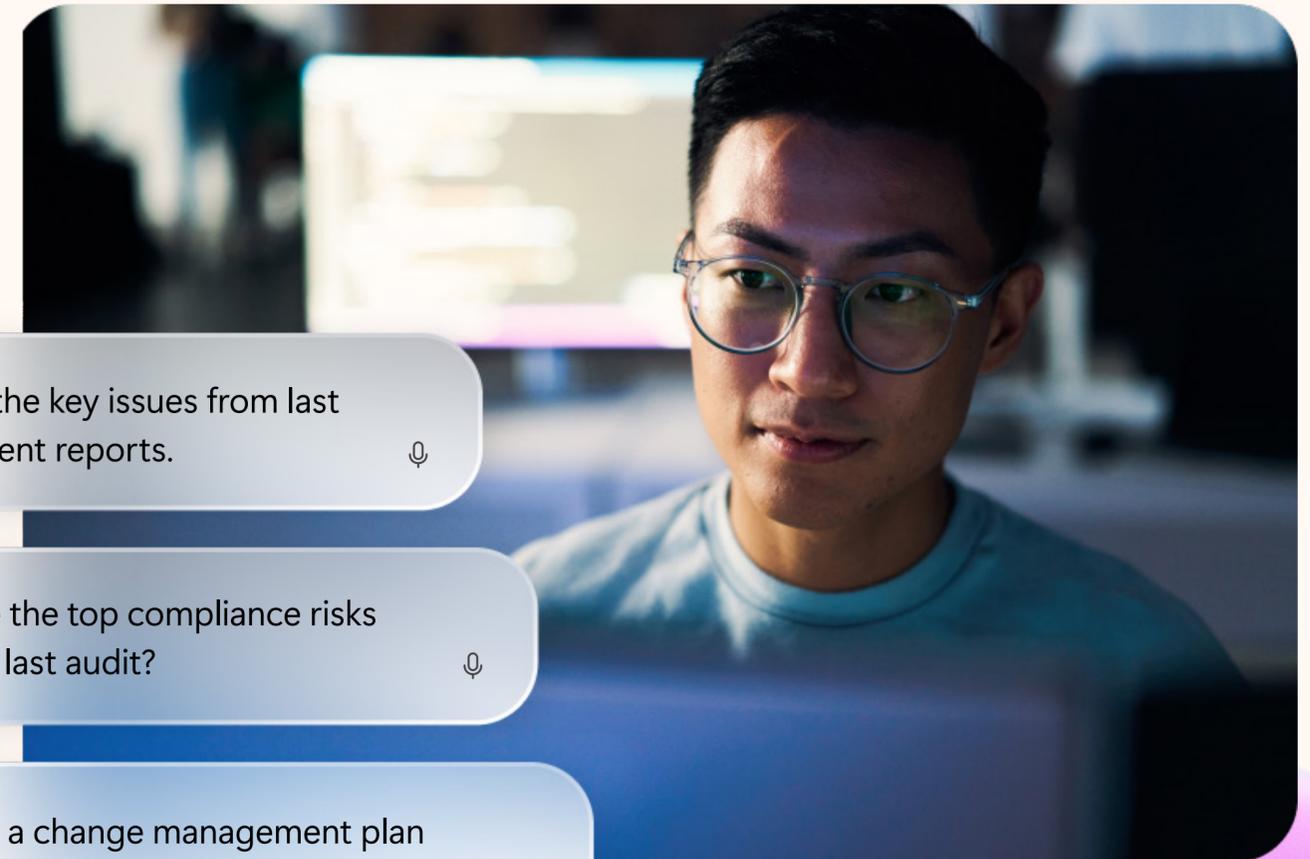
IT teams can shift from reactive support to proactive innovation, focusing on strategic initiatives like cybersecurity and digital transformation.

IT teams can use prompts like:

+ Summarize the key issues from last week’s incident reports. 

+ What are the top compliance risks from the last audit? 

+ Draft a change management plan for our upcoming system upgrade. 



# Copilot Chat in Legal

Legal teams manage a high volume of document review and contract analysis, which can make it challenging to prioritize proactive risk management and strategic counsel.

## Example

A legal counsel might spend hours cross-referencing contract clauses instead of advising on broader business implications.

## Shift

Copilot Chat can simplify legal workflows by summarizing complex documents and offering actionable recommendations. It can deliver quick, accurate summaries, allowing legal professionals to focus on higher-value work.

## Key capabilities

- Reviews and summarizes contracts and legal documents
- Highlights key risks and obligations
- Drafts legal memos and compliance summaries

## Outcome

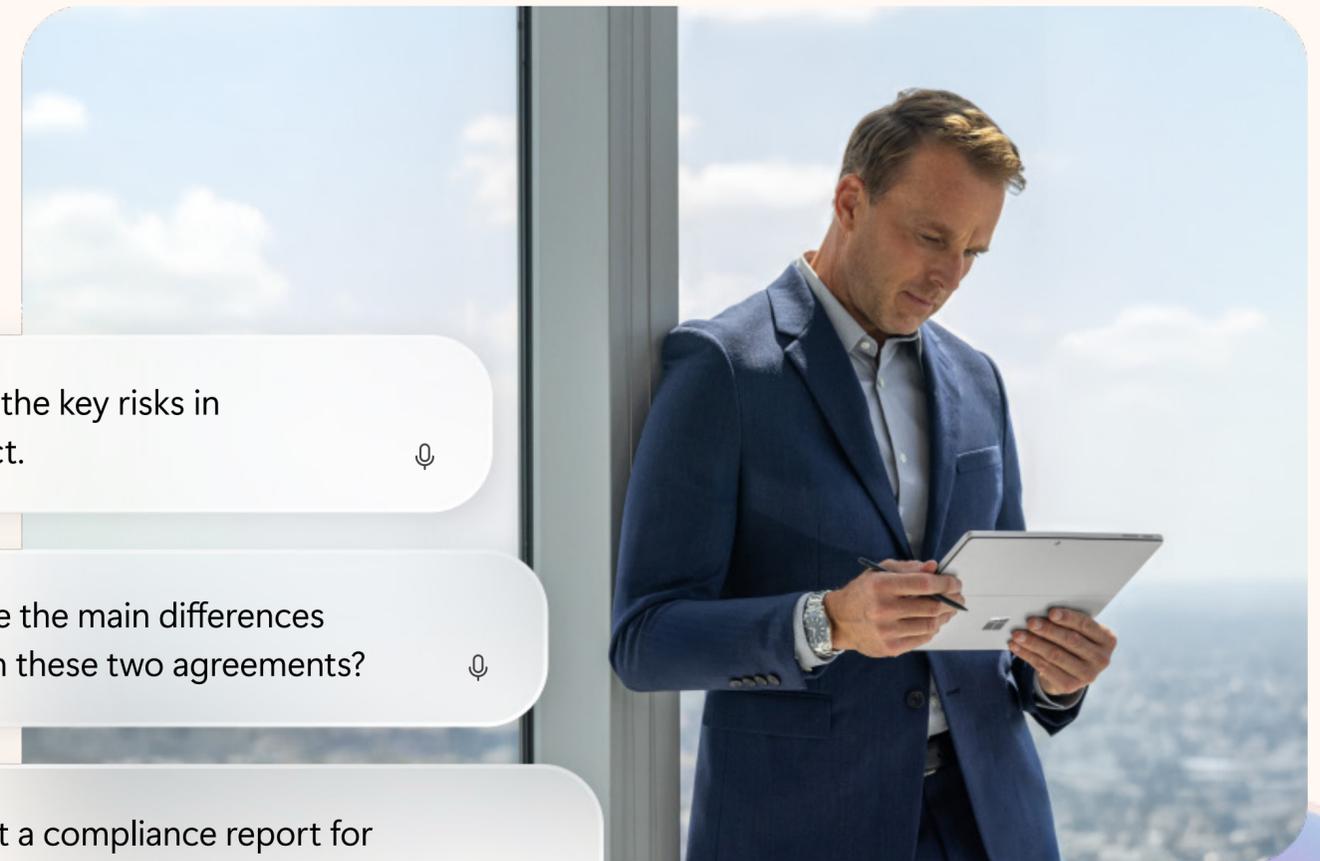
With routine tasks automated, legal teams can focus on providing strategic counsel and mitigating risks more proactively.

Legal teams can use prompts like:

+ Summarize the key risks in this contract. 

+ What are the main differences between these two agreements? 

+ Draft a compliance report for this document set. 



# Copilot Chat in Marketing

Marketing teams balance a mix of creative and analytical work, often relying on fragmented tools and scattered data. Without a unified view, it's challenging to uncover insights or focus fully on creative strategy.

## Example

A marketer preparing a campaign performance review spends hours pulling metrics and formatting slides before even thinking about new ideas.

## Shift

Copilot Chat can streamline workflows by acting as a real-time assistant that retrieves data and generates content. It analyzes documents, emails, Teams conversations, and reports to provide fast, accurate insights. It can also refine messaging, generate creative briefs, and suggest optimizations based on data.

## Key capabilities

- Summarizes campaign performance and market research
- Analyzes customer engagement in real time
- Drafts content, reports, and presentations

## Outcome

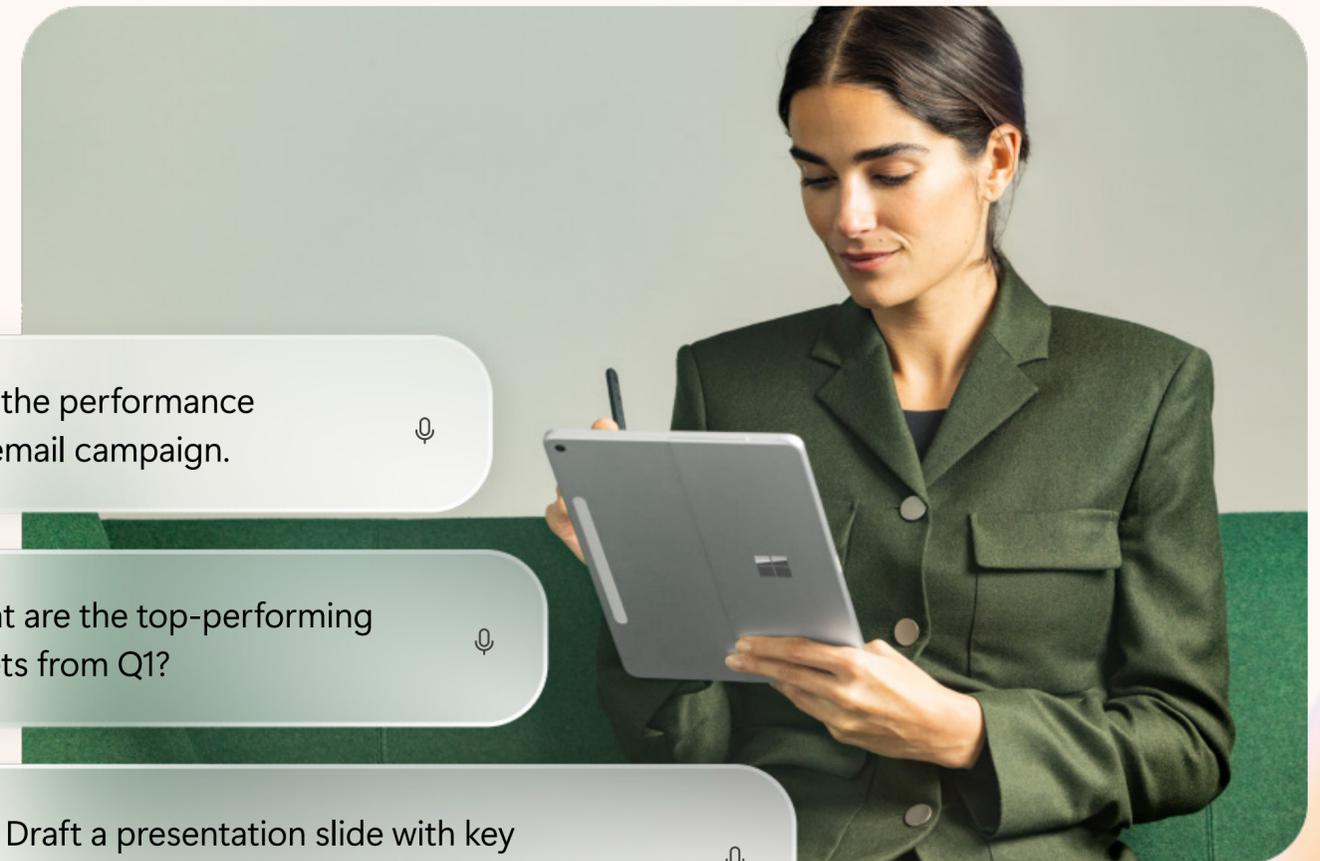
Copilot Chat can save time and enhance creativity by putting the right information at your fingertips, enabling teams to focus on strategy and impactful campaigns.

Marketers can use prompts like:

+ Summarize the performance of our last email campaign.

+ What are the top-performing assets from Q1?

+ Draft a presentation slide with key takeaways from our latest market analysis.



# Copilot Chat in Sales

Sales teams are often caught up in time-consuming administrative work—manually gathering data from CRMs, emails, and reports—which leaves them with limited visibility and less time for strategic planning or deeper customer engagement.

## Example

A sales manager might spend hours gathering past interactions and sales history to prepare for a client meeting.

## Shift

Copilot Chat can consolidate data from multiple sources to deliver insights instantly. It generates reports, drafts emails, and provides recommendations based on customer sentiment or sales trends.

## Key capabilities

- Summarizes customer interactions and feedback
- Analyzes sales data and identifies trends
- Drafts personalized emails or proposals

## Outcome

Copilot Chat can help sales teams become more strategic, providing insights and freeing up time for meaningful customer engagement and deal-making.

Sales professionals can use prompts like:



+ What were the key points from my last meeting with this customer? 

+ Summarize recent customer feedback on our Q2 offering. 

+ What trends are emerging in our Q1 sales data? 

# A catalyst for business transformation

Across teams—marketing, sales, HR, finance, IT, legal, and customer service—Microsoft 365 Copilot Chat can redefine how work gets done. By streamlining repetitive tasks, surfacing relevant insights, and enabling natural language interactions with your organization’s data, Copilot Chat can help employees move faster, think bigger, and operate more strategically.

It’s more than a productivity tool—it’s a catalyst for organizational change. Whether you’re optimizing campaigns, preparing for key meetings, or analyzing financial performance, Copilot Chat brings the power of AI to your fingertips—securely, responsibly, and seamlessly integrated into the flow of work.

With Copilot Chat, you’re not just keeping up with the pace of change—you’re leading it.

**Source:**

<sup>1</sup>“2025: The Year the Frontier Firm Is Born,” Microsoft Work Trend Index Annual Report, April 23, 2025. <https://www.microsoft.com/en-us/worklab/work-trend-index/2025-the-year-the-frontier-firm-is-born>.

The Work Trend Index survey was conducted by an independent research firm among 31,000 full-time employed or self-employed knowledge workers across 31 markets between February 6, 2025 and March 24, 2025. Knowledge workers in this context means those who typically work at a desk (either at home or at an office).

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Transform your organization: **Get started today.**

Read the 2025 Work Trend Index to learn about the emergence of the Frontier Firm—built on intelligence on demand, human-agent teams, and a once-in-a-generation shift in how we work.

**2025:**  
The Year the Frontier  
Firm Is Born

