



Microsoft 365  
Copilot

# The AI Playbook for Optimizing Business Processes



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# An opportunity to realize more value through AI

The conversation around how workplace AI is empowering users has largely revolved around the tools they need to boost productivity, save time on routine tasks, and reclaim creative bandwidth. Equipping individuals with these tools is a big step forward for an organization. But it's also just the first step.

Achieving business impact beyond individual productivity is the true potential of AI. While strengthening productivity for users is a win for businesses, focusing AI solutions to support workflows across business functions can provide even greater opportunities to increase revenue, optimize costs, and help employees to thrive.

Zooming out to apply AI across core business processes can broaden the purpose of an AI strategy—and enhance its effects—by aiming toward longer-term business value and organizational transformation.

This is where Copilot Studio comes in. As Copilot's native AI agent platform, Copilot Studio enables organizations to build, manage, and secure AI agents that are tailored to their business needs. These agents can be designed to orchestrate across systems, compress complex workflows, and deliver outcomes aligned to strategic goals. Many high-impact scenarios will require Copilot Studio to build the agents that make them possible.

In this e-book, we'll explore the ways that AI can elevate workflows for business functions that are common across industries, using specific examples to highlight the impacts that AI can have on top-line growth, bottom-line savings, and positive employee experience—for your organization.





# Aim higher with AI that supports business functions

Each area of operations within an organization has different needs, requirements, and KPIs. The systems in place for marketing, sales, HR, customer service, legal, finance, and IT are varied. And they aren't always optimized for the digital era. Today's flexible, powerful AI solutions can be applied to workflows across all these functions, transforming key processes within each area to deliver significant gains in revenue, cost optimization, and employee experience.

While many business leaders understand this value and agree that deploying AI is imperative to maintaining a competitive advantage, there is still some hesitation. Whether it's the lack of a clear AI strategy, concerns over privacy, or proving the ROI of their AI investment, some business leaders have yet to implement AI. Despite this, 82% of leaders say this is a pivotal year to rethink key aspects of strategy and operations, and 78% of leaders say their company is considering adding AI-focused roles.<sup>1</sup>

By focusing AI solutions toward specific business functions, leaders can implement an approach that yields visible, quantifiable improvements. This targeted approach can also empower business leaders to swiftly validate the ROI of their AI initiatives, showcasing how these technologies can elevate employee performance, optimize operations, and align with long-term strategic goals.

Real-world organizations have used AI to accomplish:

- A reduction in the time that sellers spend researching prior to customer outreach from four hours to 15 minutes<sup>2</sup>
- A 20–30% time and money reduction when working on RFP responses<sup>3</sup>
- A savings of up to five hours per week, per employee, by eliminating daily processes<sup>4</sup>

**Implementing AI within specific business functions creates real benefits that enable significant organizational transformation. Let's explore how.**

# The bigger picture: Overall business impact and AI

Time savings and creativity kick-starters are game-changers for individual AI users. But when business leaders broaden the focus of AI from individual productivity to functional workflows, they can drive more holistic transformation across key departments and areas of business focus. That shift often requires more than just using AI—it means designing how AI shows up across the business.

Copilot Studio helps organizations do just that: teams can build agents that are grounded in enterprise data, connected to the tools they already use, and governed with the controls they need. It's how companies move from adopting AI to architecting it for impact.

## Increasing revenue

Integrating AI into workflows can boost top-line numbers through a wide range of possibilities. For example, by enabling teams and members to improve win rates, reduce time to market with new products and services, and generate sales proposals faster.

Learn how [a global communications services provider](#) uses AI tools to enhance sales processes and revolutionize customer outreach, amounting to \$50 million in annual revenue savings.<sup>2</sup>

## Optimizing costs

Implementing AI to support business functions creates opportunities for cost efficiencies and cost avoidance—by streamlining data entry and invoice processing, reducing errors and labor costs, and enabling predictive analytics. Increased productivity and supply chain efficiencies help to increase net margin, while businesses can expect a reduction in external spend on IT contractors, as well as other generative AI licenses that are replaced with an all-up solution.

A [global leader in design, engineering, and environmental services](#) spends 20–30% less time and money working on RFP responses and sees a 10% savings in bidding costs.<sup>3</sup>

## Helping employees to thrive

AI-enabled workflows can generate greater results for teams, enhancing the sense of fulfillment and contribution at an individual level. By reducing repetitive, low-value tasks and making relevant information more accessible, team members are empowered to embrace their creativity.

Applying AI to HR workflows can also have a significant impact on enterprise-wide employee experience, increasing retention and improving hiring practices—and creating significant value for the company.

AI solutions are saving employees up to five hours per week that would usually be spent handling routine tasks, enabling [this telehealth provider](#) to recoup thousands of hours by eliminating daily processes.<sup>4</sup>

Let's examine exactly how applying AI solutions to specific business functions within the organization can help unlock these benefits.



# AI in action: Finance

AI helps finance teams avoid getting buried in manual data analysis so they can make smarter decisions faster. AI tools can pull in real-time financial data, uncover trends, and generate accurate forecasts—giving teams a clear picture of cash on hand, predicting cash flow fluctuations, and flagging risks before they impact the bottom line.

Instead of chasing discrepancies or crunching numbers, teams can focus on high-impact strategies like optimizing capital allocation or adjusting spend based on dynamic market conditions, all while ensuring regulatory compliance with minimal effort.

**Here's how AI can deliver business impact by supporting planning and analysis processes:**

## Before AI

Lack of insight into customer and market trends can lead to reactive rather than proactive processes, reducing the ability to capitalize on market opportunities.

## With AI

AI solutions can help by enabling real-time scenario modeling and reducing the time taken to deliver insightful, evidence-based proposals. AI can also assist by rapidly identifying discrepancies, predicting future trends, and ensuring compliance with financial regulations.

Here, the shift to AI can increase revenue by completing high-value tasks faster. AI helps employees to thrive by providing them with the granular, timely insights they require to perform at the highest level.

And that's just one process. AI can also benefit other critical finance processes, including risk management and compliance, and procure-to-pay.

This use case impacts numerous KPIs, and there are many more that AI solutions can measure—and enhance—for finance teams, including:

- Finance outsourcing spend
- Cost-per-analysis request
- Deal review time
- Time to close
- Compliance rate
- Forecast accuracy
- Employee retention
- Day sales outstanding

[Learn how Barclays is using Copilot to streamline how employees access information](#)

→ [Find more Finance scenarios](#)



# AI in action: Human Resources

For HR teams, AI tools can streamline processes like candidate screening and performance reviews by analyzing profiles, predicting fit, and suggesting development paths—freeing HR team members to focus on strengthening the workforce. AI can speed employee onboarding as well. A robust AI platform allows organizations to simplify access to relevant HR data, improve its quality, and shift focus from routine tasks to executing successful strategic HR initiatives.

**Let's look at how AI can deliver business impact by supporting recruiting processes:**

## Before AI

Recruiting can be a slow and cumbersome process, with a high risk of overlooking top talent due to the limitations of manual résumé screening and candidate tracking.

## With AI

AI solutions can help analyze the latest industry trends, recap meetings with hiring managers, draft a job description based on research gathered, and surface potential candidates by accessing HR systems of record.

Here, the shift to AI helps to optimize costs by accelerating manual processes and simplifying access to relevant HR data. It also helps employees to thrive by equipping HR personnel to take more relevant action to ensure that employees are suited to the expectations of their roles and can perform to their highest capabilities.

AI can also benefit other critical HR processes, including employee engagement, compensation and benefits, learning and development, and talent management.

There are many more KPIs that AI solutions can measure—and enhance—for HR teams, including:

- Employee onboarding time
- Calls answered by agents
- Issue resolution time
- Employee retention
- Hiring costs per employee
- Admin costs per employee
- First call resolution rate
- Workforce demographics

[Learn how Trace3 is using Copilot to improve recruiting processes](#)

→ [Find more Human Resources scenarios](#)



# AI in action: Sales

Selling today isn't easy: 79% of sellers say they need to support more accounts and are already spending 70% of their time on administrative tasks such as research, planning, generating proposals, data entry, and internal meetings.<sup>5</sup> Applying AI to sales processes is a great opportunity to help relieve some of this burden and let teams focus on what they do best.

Let's look at how AI can deliver business impact by supporting lead generation processes:

## Before AI

Manual processes lead to broad, untargeted strategies that result in a low conversion rate and a high cost per lead.

## With AI

Sales representatives can ask AI to identify patterns in customer data, enabling lead-scoring and other metrics to assist in discovering more high-quality leads.

Here, the shift to AI can increase revenue by fine-tuning sales processes. It also helps employees to thrive by streamlining their workflows and improving their effectiveness.

AI can also benefit other critical sales processes, including customer engagement (outreach and presentations), negotiation and closing, and post-sale follow-up and upsell.

This use case impacts numerous KPIs, and there are many more that AI solutions can measure—and enhance—for sales teams, including:

- Opportunities pursued
- Deal size
- Win rate/close rate
- Customer retention
- Average discount size
- Upsell/cross-sell rate
- Cost per lead
- Sales cycle length
- Response rate

[Learn how Lumen is using Copilot to support sellers](#)

→ [Find more Sales scenarios](#)



# AI in action: Marketing

How can marketing teams today meet the challenge of delivering personalized experiences at scale while staying agile in response to shifting consumer trends? AI tools enable teams to analyze vast amounts of customer data in real time, identifying patterns and tailoring campaigns that resonate with individual audiences. By automatically optimizing ad spend based on real-time performance data, marketers can allocate resources more efficiently, driving higher engagement and conversion rates without manual adjustments.

**Let's look at how AI can deliver business impact by supporting campaign execution processes:**

## Before AI

Manual coordination and tracking lead to inefficient resource allocation, higher operational costs, and lack of agility to adapt to market responses.

## With AI

AI assists users in analyzing campaign performance, enabling marketers to swiftly identify and incorporate the most impactful marketing tactics. This ensures a more strategic and effective deployment of marketing resources.

Here, the shift to AI can increase revenue by sharpening marketing effectiveness, optimize costs by allocating marketing spend to channels that show data-driven results, and help employees to thrive by streamlining their workflows to achieve greater results.

That's just one application for AI within marketing. AI can also benefit other critical marketing processes, including demand generation, customer insights and strategy, and content creation.

This use case impacts numerous KPIs, and there are many more that AI solutions can measure—and enhance—for marketing teams, including:

- Leads generated
- Agency spend
- Customer retention
- Employee retention
- Cost per lead
- Brand value
- Lead conversion rate
- Revenue per lead generated

[Learn how Finastra is using Copilot to reduce the time needed to create marketing content](#)

→ [Find more Marketing scenarios](#)



# AI in action: Legal

Legal departments are navigating an increasingly dynamic and complex legal, regulatory, and compliance landscape. AI tools can dramatically reduce the time spent managing compliance, reviewing contracts, and mitigating risk—at scale—by rapidly analyzing large volumes of legal documents, identifying potential risks or discrepancies, and flagging issues for review.

These tools also help to ensure that the organization remains compliant with both local and international laws by speedily comparing contracts to predefined templates or regulatory frameworks, reducing the likelihood of legal disputes. Instead of manually reviewing contracts, legal teams can focus on high-priority negotiations while AI handles standard clauses, keeping operations efficient and legally sound.

**Here's another way AI can deliver business impact, this time by supporting contracting processes:**

## Before AI

Managing contracts can feel like navigating a paper jungle, where critical details can be buried under stacks, making the process slow, error-prone, and inefficient.

## With AI

AI can accelerate contract reviews and compare keywords and statements in relation to contract disputes found in legal systems of record—fast. This enables swift analysis and reduction of time spent on manual reviews and negotiations.

Here, the shift to AI allows legal teams to reallocate their time to higher-value tasks, creating cost efficiency by accelerating key analysis, and helps employees to thrive by removing menial tasks from their responsibilities.

That's only one of many shifts that AI can enable for critical legal processes, including litigation and advisor services.

This use case impacts numerous KPIs, and there are many more that AI solutions can measure—and enhance—for legal teams, including:

- Outside counsel spend
- Cost per internal review
- Compliance rate
- Contract error rate
- Number of disputes
- Dispute win rate

[Learn how Clifford Chance is creating work efficiencies with Microsoft 365 Copilot](#)

→ [Find more Legal scenarios](#)



# AI in action: Customer Service

For customer service teams, AI tools can drastically improve response times and elevate service quality. By analyzing incoming queries and automatically suggesting relevant solutions, these tools help agents resolve issues faster, freeing them to focus on more complex cases that require empathy and critical thinking.

Additionally, AI can prioritize tickets based on urgency, customer history, or impact, ensuring that the most critical issues are handled first. This not only boosts customer satisfaction but also enables teams to scale their operations without sacrificing quality, even during high-demand periods.

**Here's how AI can deliver business impact by supporting problem resolution processes:**

## Before AI

Inconsistent resolutions can lead to a high volume of unresolved customer issues, which may impact customer loyalty and repeat service requests.

## With AI

AI can provide agents with step-by-step resolution procedures based on customer history, diagnosed issues and procedures, and historical resolution data to resolve an issue and better respond to a customer's needs.

This shift to AI increases revenue by building customer loyalty and lifetime value, enables cost efficiency by responding to customer needs faster and more intuitively, and helps employees to thrive by giving them the information they need to excel at their work.

That's just one aspect of the much broader impact of AI. It can also benefit other critical customer service processes including issue diagnosis and support assignment.

This use case impacts numerous KPIs, and there are many more that AI solutions can measure—and enhance—for customer service teams, including:

- First call resolution rate
- Calls answered by agents
- Issue resolution time
- Customer retention
- Case volume
- Time to first response
- Average call time
- Customer experience (CSAT)

[Learn how Holland America line is using Microsoft Copilot Studio to enhance their customer support experience](#)

→ [Find more Customer Service scenarios](#)



# AI in action: IT

IT teams are under mounting pressure to respond to growing complexity and scale within their systems. Enhancing IT workflows with AI solutions can help. By detecting and addressing anomalies before they escalate into major issues, AI tools free up valuable time for innovation. From proactive maintenance to real-time performance tuning, AI-enabled insights help IT teams not only resolve problems faster, but continuously optimize their infrastructure for future needs.

**Let's look at how AI can deliver business impact by supporting software management and acquisition processes:**

## Before AI

Frequent manual updates and patches can cause delays and inconsistencies, resulting in software vulnerabilities and downtime.

## With AI

IT leaders can quickly and accurately compare available solutions in-market, aggregate multiple threads of conversations, create a holistic view of all essential business requirements for the new solution, and swiftly create a solution RFP.

Here, the shift to AI increases revenue by keeping end users equipped with the most innovative, relevant digital tools available to pursue business objectives, and helps employees to thrive by enabling greater output and success within their roles.

That's just a glimpse of what AI can do for IT teams. It can also benefit other critical IT operations, including device management, change management, user adoption, and network operations.

There are many more KPIs that AI solutions can measure—and enhance—for IT teams, including:

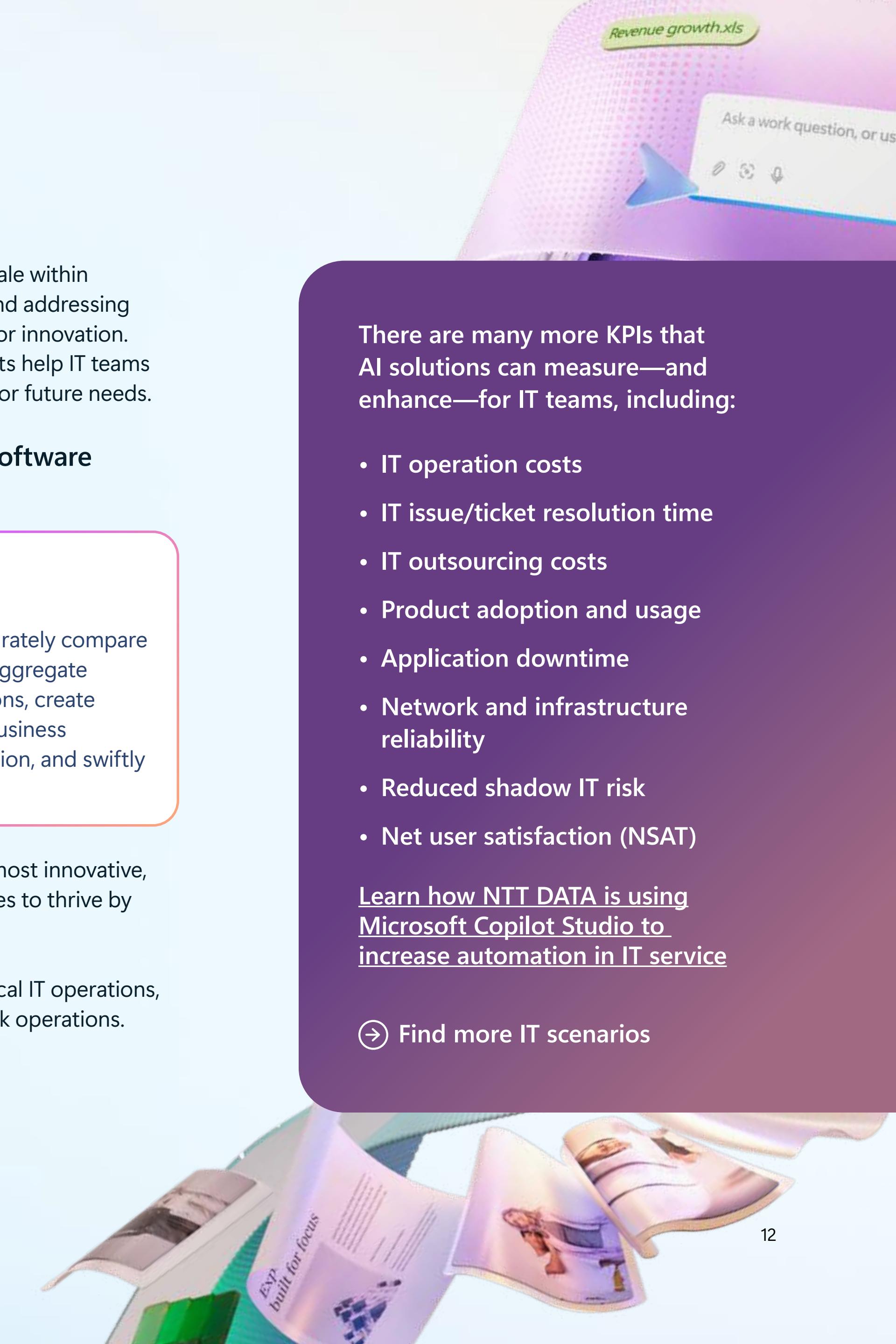
- IT operation costs
- IT issue/ticket resolution time
- IT outsourcing costs
- Product adoption and usage
- Application downtime
- Network and infrastructure reliability
- Reduced shadow IT risk
- Net user satisfaction (NSAT)

[Learn how NTT DATA is using Microsoft Copilot Studio to increase automation in IT service](#)

→ [Find more IT scenarios](#)

The AI Playbook for Optimizing Business Processes

To elevate these benefits and custom build these solutions, use Copilot Studio to create and manage AI agents. A lightweight version is included within M365 Copilot and enables simple agent creation; autonomous capabilities can be accessed in the full version. [Learn more about Copilot Studio](#)



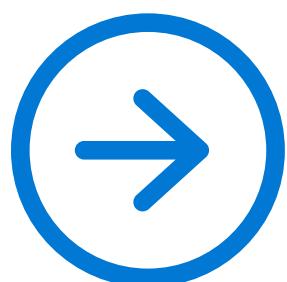


# Microsoft 365 Copilot

Microsoft 365 Copilot is your AI assistant for work, designed to enhance workflows within your key business functions using industry-leading integration, innovation, and security. With Copilot, organizations can harness the full potential of AI to drive business value—by increasing revenue, optimizing costs, and enhancing employee experience. By combining Copilot and agents, organizations can streamline operations and accelerate outcomes. Copilot Studio, the native AI agent platform for Copilot, empowers you to build, manage, and secure AI agents that learn, act, and adapt to your business needs.

By embracing the momentous shift to AI, you're boosting more than just individual and team productivity—you've opened the door to tremendous business transformation and operational excellence.

Discover how to use Copilot in your organization's everyday apps and workflows to get more impactful work done, faster.



**Start your journey with  
Microsoft 365 Copilot**

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

<sup>2</sup>"Lumen's strategic leap: How Copilot is redefining productivity and employee engagement," Microsoft, Inc., May 21, 2024

<sup>3</sup>"GHD's productivity surge: How AI is reinventing the RFP process in construction and engineering," Microsoft, Inc., March 12, 2024

<sup>4</sup>"Teladoc Health: Transforming telehealth operations with Copilot," Microsoft, Inc., August 23, 2024

<sup>5</sup>"Using Copilot in Sales," Microsoft, Inc., 2024