

Meet Amir. He is a financial analyst.

A day in the life of a financial analyst

Amir needs to ensure the company's balance sheets and performance are where they should be now and in the future. His role includes financial reporting, budgeting and forecasting, strategic decision-making and even drafting stakeholder communications.

Find out how Amir is using AI to offload mundane tasks, so that his time is spent on the high-value work that makes the biggest impact.



8:00 AM

Workday begins at home

Before leaving the house, Amir asks Copilot in Outlook to summarize the emails he received.

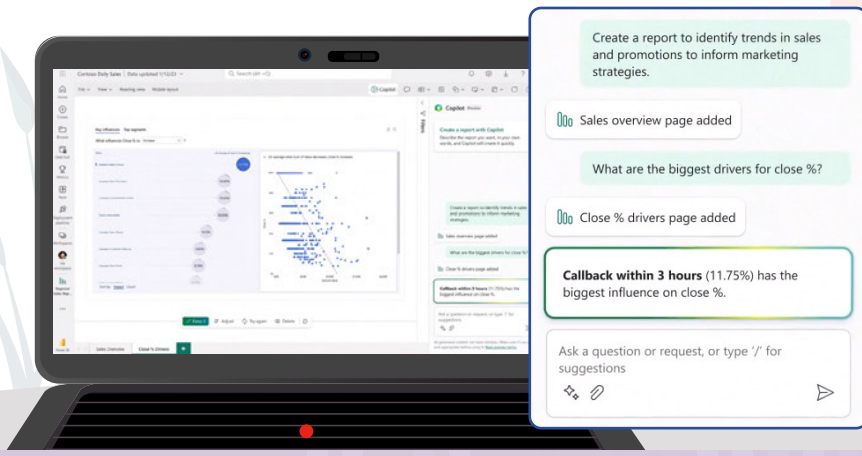
Copilot highlights a request from a colleague asking Amir what contributed to a spike in fixed overhead costs for the company over the past two quarters.



9:00 AM

Reaching the office

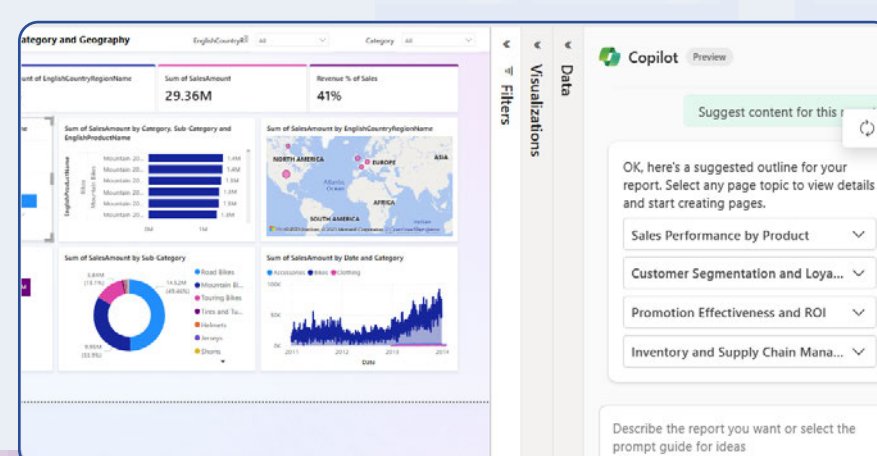
Amir prompts Copilot for Power BI in Fabric to review the historical data for the company's overhead costs for the last three years. He then asks Copilot to create a breakdown of the data for the last 3 quarters and visualize what contributed to the increase.



10:00 AM

Preparing a deck

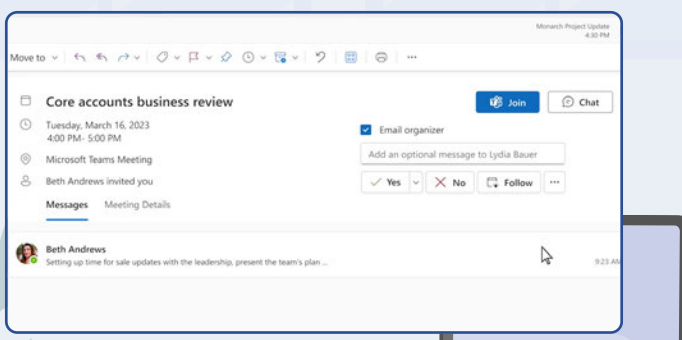
What Amir found: The overhead costs jumped due to an unexpected increase in several fixed overheads. He asks Copilot for Power BI to suggest a report format that makes the data easiest to understand. Then, Amir prompts Copilot to create a narrative based on key insights from the data.



11:00 AM

Schedule a meeting

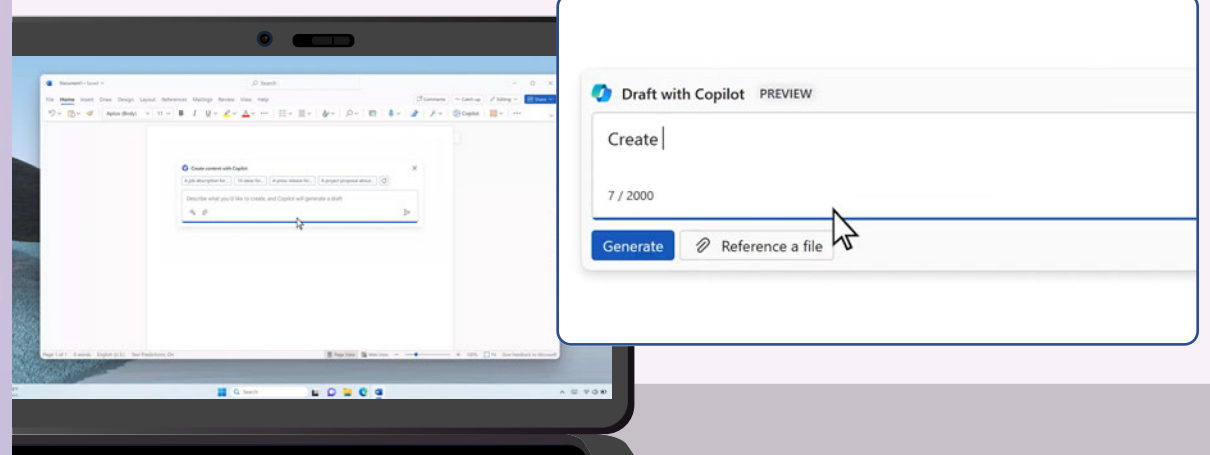
Amir shares the report with his colleague via Loop and invites them to collaborate. He also asks Copilot in Teams to write a meeting agenda and send an invitation for a call at 4PM later today.



1:00 PM

Creating a report

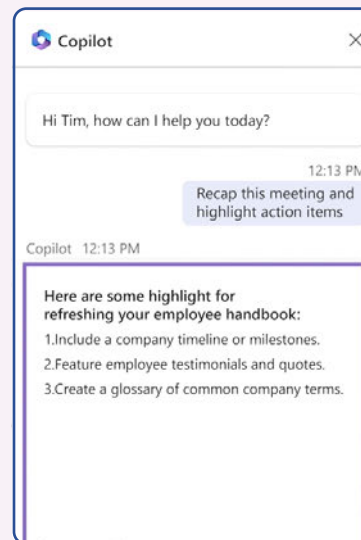
Based on his findings, Amir asks Copilot in Word to create an executive report on the increase in business overhead costs. He prompts Copilot to write it in a formal tone, as the document is meant for senior stakeholders.



2:00 PM

Meeting with team

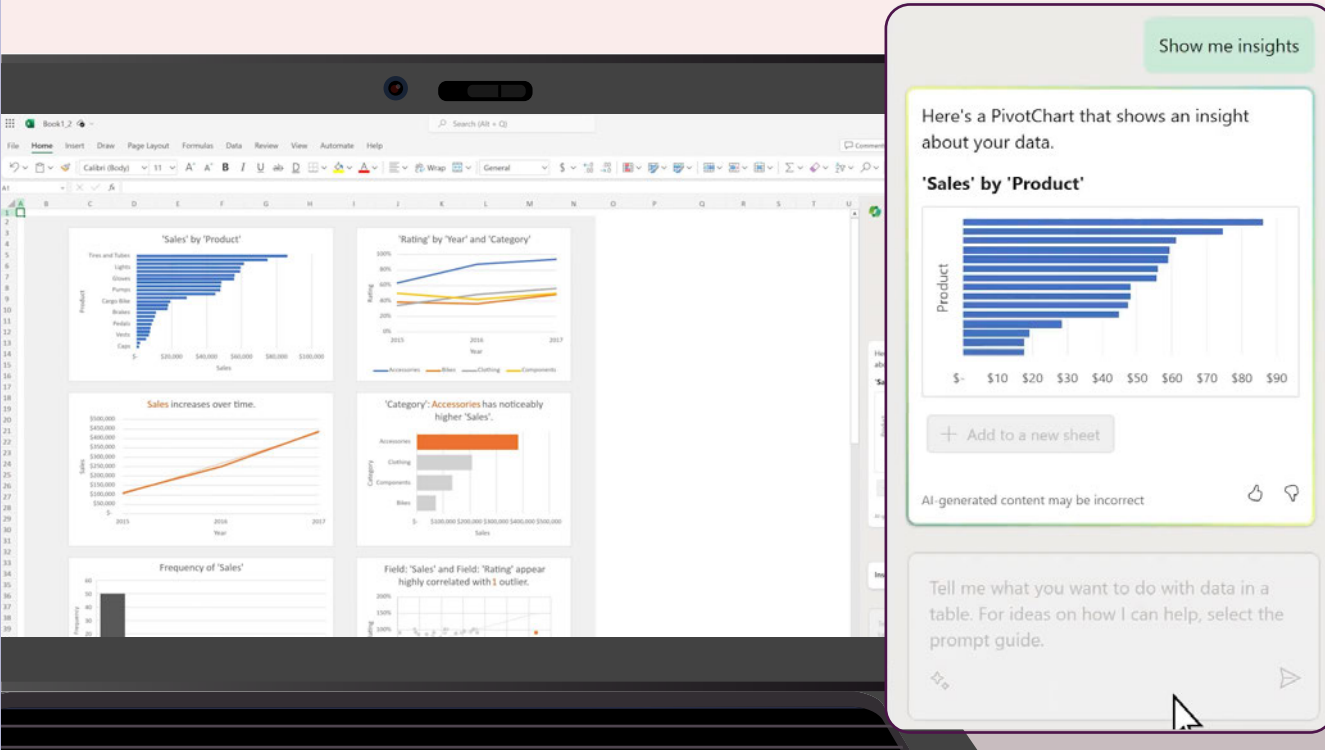
During the Teams meeting, Amir runs through his findings with colleagues. Copilot in Teams automatically summarizes key discussion points and sends a copy to everyone on the call.



3:30 PM

Creating a budgeting and forecasting report for CFO

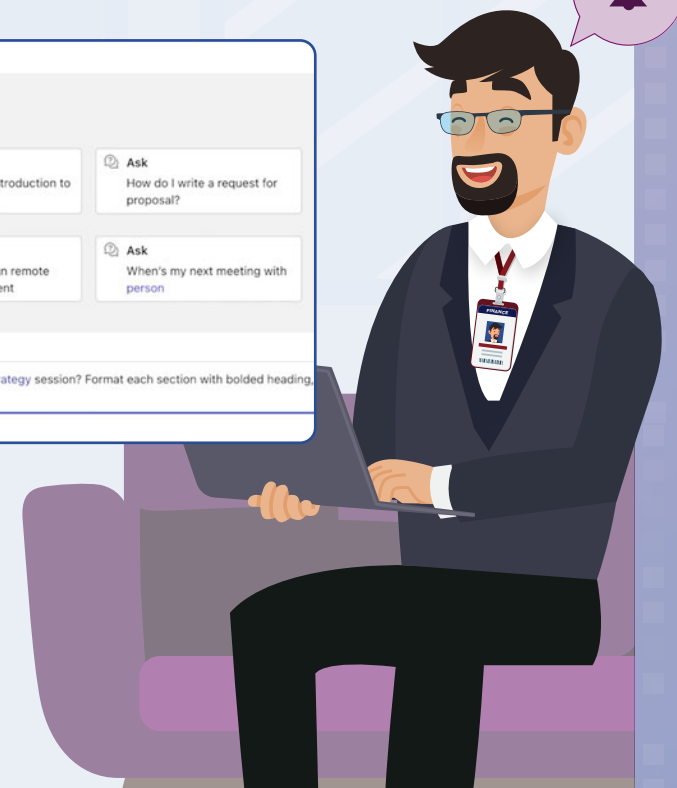
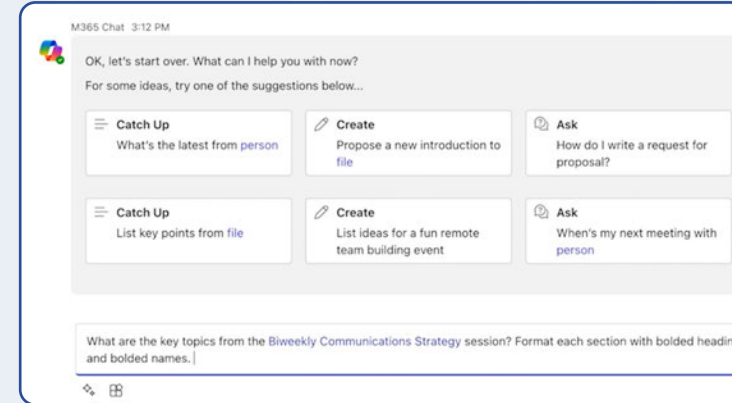
Based on the past year's business data and expenditures, Amir asks Copilot in Excel to identify trends, generate scenario models for the quarter ahead and suggest ideas for expenditures and improving profit margins.



5:00 PM

Last tasks before ending the day

Amir asks Copilot in Teams to draft a brief meeting agenda and schedule a call later in the week with his CFO.



75%

of early Copilot users say the AI assistant "saves me time by finding whatever I need in my files"¹



Find out how Amir automated financial workflows and improved productivity with Copilot for Microsoft 365 from Lenovo

[Learn more >](#)

¹What can Copilot's earliest users teach us about Generative AI at work?