

Copilot for Finance

Accelerating Financial Analysis, Reporting, and Decision Support with Microsoft Copilot

4-Hour - Finance Productivity & Reporting Programme

Finance teams are under increasing pressure to deliver accurate analysis, timely reporting, meaningful insights, and strategic recommendations. While organisations continue to automate financial processes, finance professionals still spend considerable time analysing spreadsheets, preparing variance reports, writing commentary, and communicating results to stakeholders.

Microsoft 365 Copilot helps finance professionals work more efficiently by transforming financial data into insights, automating report creation, generating budget commentary, identifying trends, and supporting decision-making through AI-powered analysis. Existing Copilot training materials highlight the ability to analyse Excel data, generate formulas, create charts, identify trends, summarise information, and support reporting activities.

Copilot for Finance is a practical, business-focused programme designed to help finance professionals leverage Microsoft Copilot to improve reporting efficiency, enhance financial analysis, strengthen forecasting activities, and provide greater strategic insight to the organisation.

Finance teams frequently spend significant time:

- Analysing financial results
- Investigating variances
- Producing monthly reports
- Preparing board and management packs
- Developing forecasts and budgets
- Writing commentary and explanations
- Creating presentations and stakeholder communications

Microsoft Copilot can help streamline these activities while improving consistency, speed, and insight generation.

Business Outcomes

- Accelerate financial analysis
- Reduce manual reporting effort
- Improve budget and forecast reporting
- Generate variance commentary faster
- Create management reports more efficiently
- Enhance financial storytelling and communication
- Improve decision support capability
- Increase productivity across the finance function

Target Audience

This programme is designed for:

- Finance Managers
- Financial Controllers
- Management Accountants
- Accountants
- Assistant Accountants
- Financial Analysts
- Commercial Analysts
- Budget Managers
- Business Partners
- CFOs and Senior Finance Leaders

Prerequisites

Participants should have a working knowledge of Microsoft Excel and basic financial reporting concepts.

Program Objectives

By the end of this programme participants will be able to:

- Use Copilot to analyse financial data more efficiently
 - Generate meaningful management insights
 - Create budget and forecast commentary faster
 - Investigate and explain financial variances
 - Produce executive-ready financial reports
 - Support business decision-making through AI-assisted analysis
 - Create presentations and stakeholder communications
 - Apply effective prompting techniques for finance scenarios
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Program Content

Getting Started with Copilot for Finance

Understand how Copilot can support financial reporting, analysis, forecasting, and decision-making.

Key Topics

- Microsoft 365 Copilot overview
- Finance-focused use cases
- Responsible use of AI in finance
- Reviewing and validating AI-generated outputs
- Prompting fundamentals for finance professionals
- Working with organisational and financial information

Business Benefit

Increase confidence using AI within finance processes while maintaining appropriate financial controls and professional judgement.

Excel Analysis and Financial Insights

Use Copilot to transform financial data into meaningful business intelligence.

Key Topics

- Analysing financial datasets
- Identifying trends and anomalies
- Creating and explaining formulas
- Generating charts and visualisations
- Building financial summaries
- Working with PivotTables and analysis tools
- Identifying key performance drivers

Business Benefit

Reduce time spent analysing financial data while improving the quality and depth of insights delivered to stakeholders.

Variance Analysis and Exception Reporting

Move beyond reporting numbers and focus on explaining what is driving financial performance.

Key Topics

- Budget versus Actual analysis
- Forecast versus Actual reporting
- Revenue variances
- Expense variances
- Trend and period comparisons
- Identifying material movements
- Exception reporting techniques

Business Benefit

Improve the speed and consistency of variance analysis while helping management focus on key financial issues and opportunities.

Budget Commentary and Financial Storytelling

Create meaningful narrative commentary that explains the numbers.

Key Topics

- Drafting management commentary
- Explaining revenue performance
- Explaining operational expenditure variances
- Forecast narrative creation
- Executive-level financial summaries
- Writing for different stakeholder audiences
- Improving readability of finance reports

Business Benefit

Reduce the effort required to prepare monthly reporting commentary while improving clarity and consistency across reports.

Management Reporting and Executive Summaries

Create concise, insightful reports for leadership teams and boards.

Key Topics

- Monthly management reports
- Board reporting
- Executive summaries
- Financial performance updates
- KPI reporting
- Consolidating information from multiple sources
- Producing stakeholder-ready reports

Business Benefit

Accelerate the production of management reports while improving presentation quality and business insight.

Budgeting, Forecasting and Planning Support

Leverage Copilot to support forward-looking financial planning activities.

Key Topics

- Budget development support
- Forecast preparation
- Assumption analysis
- Scenario planning
- Financial planning discussions
- Sensitivity analysis
- Risk and opportunity identification

Business Benefit

Improve planning efficiency and support more informed forecasting and budgeting decisions.

Finance Presentations and Stakeholder Communication

Turn financial information into compelling business communication.

Key Topics

- Creating board presentations
- Executive financial briefings
- Management updates
- Presentation development using Copilot
- Financial communication best practices
- Presenting complex financial information clearly

Business Benefit

Improve communication of financial results and strengthen engagement with executives and business stakeholders.

Building Your Finance Copilot Toolkit

Develop a practical framework for using Copilot within everyday finance activities.

Key Topics

- Monthly reporting workflows
- Finance prompting techniques
- Variance commentary templates
- Budget reporting frameworks
- Productivity opportunities
- AI best practices for finance teams

Business Benefit

Enable immediate adoption of Copilot within budgeting, forecasting, reporting, and analysis processes.

Included with the Program

Participants receive:

- Comprehensive course workbook
- Finance Prompt Library
- Variance Commentary Templates

- Budget Reporting Frameworks
- Management Reporting Templates
- Executive Summary Templates
- Finance AI Best Practice Guide
- Certificate of Completion

Business Benefits

Organisations investing in this programme can expect finance teams to:

- Improve reporting efficiency
- Reduce manual analysis effort
- Generate insights faster
- Improve quality of financial commentary
- Deliver more strategic financial advice
- Strengthen decision support capability
- Improve stakeholder communication
- Maximise the value of Microsoft 365 Copilot

Delivery Options

Course: Copilot for Finance

Duration: 4 Hours

Cost: \$450+GST per person

Delivery: Classroom or Virtual Instructor-Led Training

Level: Intermediate

Audience: Finance Managers, Accountants, Financial Analysts, Controllers, Business Partners and Finance Leaders

2027 Dates (9am to 1pm):

- Thursday, 11 February 2027
- Wednesday, 17 March 2027
- Wednesday, 21 April 2027
- Tuesday, 25 May 2027
- Tuesday, 29 June 2027
- Friday, 30 July 2027
- Thursday, 2 September 2027
- Wednesday, 6 October 2027
- Tuesday, 9 November 2027
- Friday, 10 December 2027

Software Solutions

Empowering Finance Professionals to Move Beyond Reporting Numbers and Deliver Meaningful Insight, Strategic Advice, and Better Business Decisions with Microsoft Copilot.

Practical Microsoft Copilot training designed to help finance teams accelerate analysis, streamline reporting, strengthen forecasting, and transform financial data into actionable business intelligence.