

We scaled reporting & forecasting platforms while enabling individual innovation.

Financial Planning & Analysis

At Microsoft, our finance organization reports and forecasts on 40 sales regions and thousands of commercial and consumer products across revenue, COGS, OPEX, and CAPEX. Historically, these FP&A teams have relied on manual data extraction, deep system knowledge, and SMEs to translate analytics into executive-ready insights for close, forecasting, and planning processes. This often required four weeks per quarter for data preparation and modeling, two weeks per quarter to draft and edit commentary, and coordination across hundreds of experts.

AI has fundamentally changed this model. By embedding Copilot tools and role-based agents into reporting and analysis workflows, teams have democratized institutional knowledge, enabled natural-language access to complex data, and accelerated audit and reconciliation. As a result, teams have shortened quarterly reporting and forecasting cycles by two weeks, and work has shifted toward higher-value insight and decision making. In practice, that means less time pulling data and more time actually using it.

Agents and automation in close reporting

Our internal Finance and Finance IT teams have leveraged Microsoft tools to build custom AI solutions within the Microsoft ecosystem, tailored to our underlying systems and data. These solutions enable FP&A teams to connect data, analysis, and storytelling end-to-end from data ingestion and transformation through executive-ready insights for each of their close cycles.

Fabric

In close reporting, value is created in the handoff between data, analysis, and storytelling. In most finance teams, those steps live in different tools and require repeated, manual translation. This requires a single source of truth as the platform for data analysis. We migrated legacy cubes and fragmented datasets – including both financial and non-financial data – to **Fabric**, which consolidates data engineering, transformation, storage, and analytics into a single platform. This is important when we have billions of rows of finance and revenue data to process each month. Financial data reports that previously took up 5 hours to generate are now delivered in 45 minutes, ready to be used in analysis and scenario planning.

Main development tool:



Learn more:

aka.ms/FabricPlatform

Agents and automation in close reporting

Financial Insights Platform

Built on top of Fabric's data platform, **Financial Insights Platform** provides an end-to-end experience that automates finance activities such as close reporting. It brings three key capabilities together: chatting with data, generating commentary, and generating PowerPoint visuals. Financial analysts and controllers select their business context and leverage the platform capabilities that enable them to automatically produce executive-ready outputs including variance tables, narrative drafts, visuals, and PowerPoint exports. This saves an additional 12 hours per month per analyst on their recurring reporting cycle work, on top of the savings from Fabric.

Main development tool: Azure AI Foundry	Learn more: aka.ms/FinancialInsightsPlatform
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Close Commentary Agent

Some finance teams have more specific close reporting needs, such as adjusting executive communication across multiple geographic audiences. Our Sales Finance and Finance IT teams built a **Close Commentary Agent** which drafts consistent, metric-aligned commentary for the monthly close across geographies in a consolidated view across time periods and products. Generative AI saves the sales finance team 3K hours per year, allowing them to focus more time on customers.

Main development tool: M365 Copilot	Learn more: aka.ms/CloseCommentaryAgent
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	Before	After
1 Data	Time-heavy tasks <ul style="list-style-type: none">Consolidating data across systemsRepetitive refresh cycles	Time given back for <ul style="list-style-type: none">Ensuring data qualityFaster alignment on key drivers and assumptions
2 Analysis	<ul style="list-style-type: none">More time spent preparing inputsFragmented or incomplete context	<ul style="list-style-type: none">Deeper, judgement-driven analysesIterating on scenarios and testing assumptions
3 Storytelling	<ul style="list-style-type: none">Refreshing visualsWriting context dependent commentary	<ul style="list-style-type: none">Connecting insights to business impactInfluencing decisions and next steps

Solutions give time back to teams to focus on what matters.

Agents and automation in forecasting and planning

Our internal Finance and Finance IT teams have leveraged Microsoft tools to build custom AI solutions within the Microsoft ecosystem, tailored to our underlying systems and data. These solutions enable FP&A teams to quickly iterate on their forecasts and scenario models, driving executive-level decisions faster than ever before.

Revenue Planning Platform

Financial forecasting has historically shared the same challenges as close reporting: fragmented revenue and sales data spread across multiple systems and translating business signals into a narrowed set of decision-ready scenarios leaders can act on. The **Revenue Planning Platform**, built by our Finance IT team, provides a centralized, AI-enabled experience for data injection, driver calculation, predictive multi-methodology modeling, scenario planning, and self-serve insights for decision making. The planning platform delivers \$15M and 4K hours of annual savings, and built-in traceability, version control, and role-based security improve speed to decisions.

Main development tool: GitHub Copilot	Learn more: aka.ms/RevenuePlanningPlatform
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GitHub Copilot Forecasting Model

For additional, specialized forecasting needs, finance teams can also create fit-for-purpose models without an engineering background. The **GitHub Copilot Forecasting Model**, built by a finance professional through chat prompts, now produces code, visuals, confidence intervals, and accuracy metrics across 75 models, reaching 98% accuracy in stable segments. This shift eliminates repetitive manual modeling work, allows forecasts and weekly leadership reporting to run automatically in the background, and frees capacity for higher-value analysis such as explaining drivers, identifying anomalies, and stress-testing scenarios. The result is a more agile and explainable forecasting capability where finance teams learn continuously and focus time on judgment rather than mechanical model building.

Main development tool: GitHub Copilot	Learn more: aka.ms/GHCPForecastingModel
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<i>Finance IT developed</i>			
Revenue Planning Platform			
1	\$15M	4,000	
<small>data source</small>	<small>saved</small>	<small>hours saved</small>	
<i>Citizen developed</i>			
GitHub Copilot Forecasting Model			
300	75	98%	0
<small>lines of code</small>	<small>models</small>	<small>accuracy</small>	<small>coding experience</small>

In conjunction, these experiences shorten the numbers-to-narrative cycle, improve consistency across regions, and give leaders faster, clearer insight into performance and actions. Finance professionals leverage these solutions to report and forecast with greater speed and flexibility, using trusted, IT-built capabilities while self-serving with citizen-developed innovation for specialized needs.