



# Frontier Finance Brief

**Microsoft AI solutions for Finance professionals: Analyst, Researcher and Finance in M365 Copilot**

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**Tags:**

Analyst, Researcher, Finance in M365 Copilot



## Overview

If you're eager to incorporate agents to simplify your daily tasks but aren't sure where to begin, this brief is for you! In Microsoft Finance, we have put these agents to work in various domains to drive value fast. In this brief, you'll discover how to take advantage of Microsoft's AI solutions: Analyst, Researcher, and Finance in M365 Copilot.

### Why is it important?

Microsoft's role-based AI solutions will help your team achieve more, faster. These existing solutions can automate complex, repetitive tasks such as data analysis, variance analysis, and reconciliation, helping finance teams focus more on work that matters.



### 1. Perform quantitative Finance tasks with Analyst

Let's explore our first Microsoft role-based AI solution: Analyst. This agent is like having a highly skilled data scientist at your fingertips. Now you don't need to know how to code to handle complex finance scenarios. With a simple prompt, you can forecast revenue, analyze purchasing patterns, cost structures, model financial risk and Return on Investment (ROI), or even clean and transform raw financial data in preparation for deeper analysis.

## Analyst demonstrates exceptional proficiency in

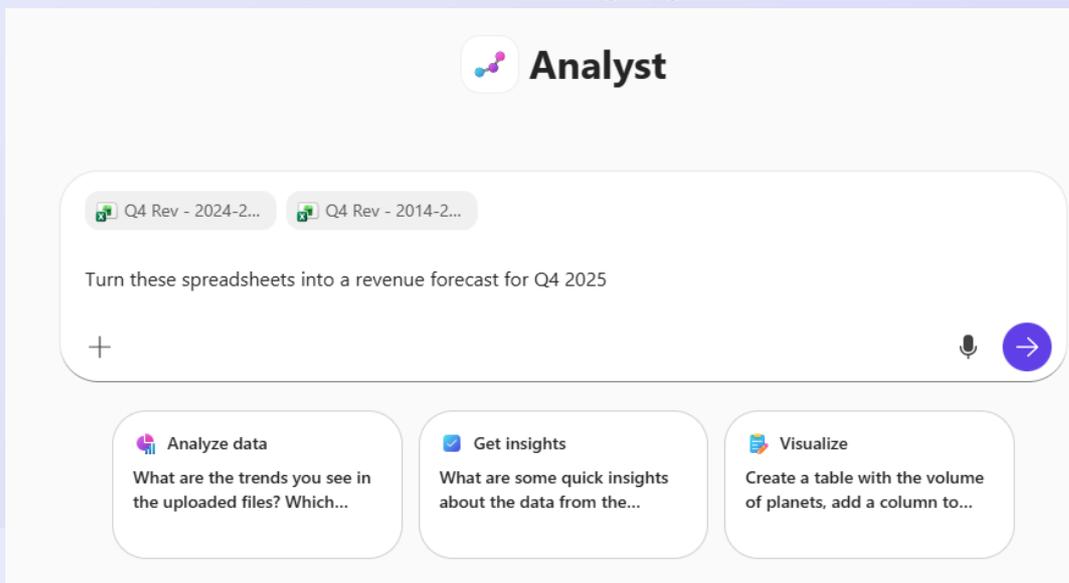
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- Advanced data analysis
- Iterative reasoning (chain-of-thought)
- Running Python code for complex queries
- Visualizing and modeling financial data

## Finance prompts suggestions for Analyst:

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- "Turn these spreadsheets into a revenue forecast for Q4."
- "Analyze customer transaction data to identify purchasing trends."
- "Model the financial impact of a 5% cost increase across departments."
- "Visualize monthly cash flow and highlight anomalies."



## How are we using Analyst in Microsoft Finance?

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***"Analyst is central to how we're reimagining FP&A for the AI era. By automating variance analysis and flash reporting, the agent improves our agility, helping optimize data structures for accuracy and keeping***



***executive summaries better aligned with the pace of our business reviews.”***

- Diego Gandara, Principal Software Engineering Manager, Microsoft Finance Data & Experiences (FD&E)

## 2. Synthesize large data volumes with Researcher

Our next Microsoft role-based AI solution: Researcher, is just as powerful. With Researcher, complex synthesis that used to take hours now takes minutes. This agent can synthesize large volumes of internal and external data to generate insights, strategies, or create reports. Researcher requires no coding and can help build Go-to-Market (GTM) strategies for new products, spot areas for investment portfolio growth or diversification, and streamline the creation of quarterly financial reports.

### Researcher demonstrates exceptional proficiency in

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- Multi-step reasoning
- Combining enterprise data (emails, meetings, files, chats) with web and third-party sources (Salesforce, ServiceNow, etc.)
- Delivering high-quality, contextual insights

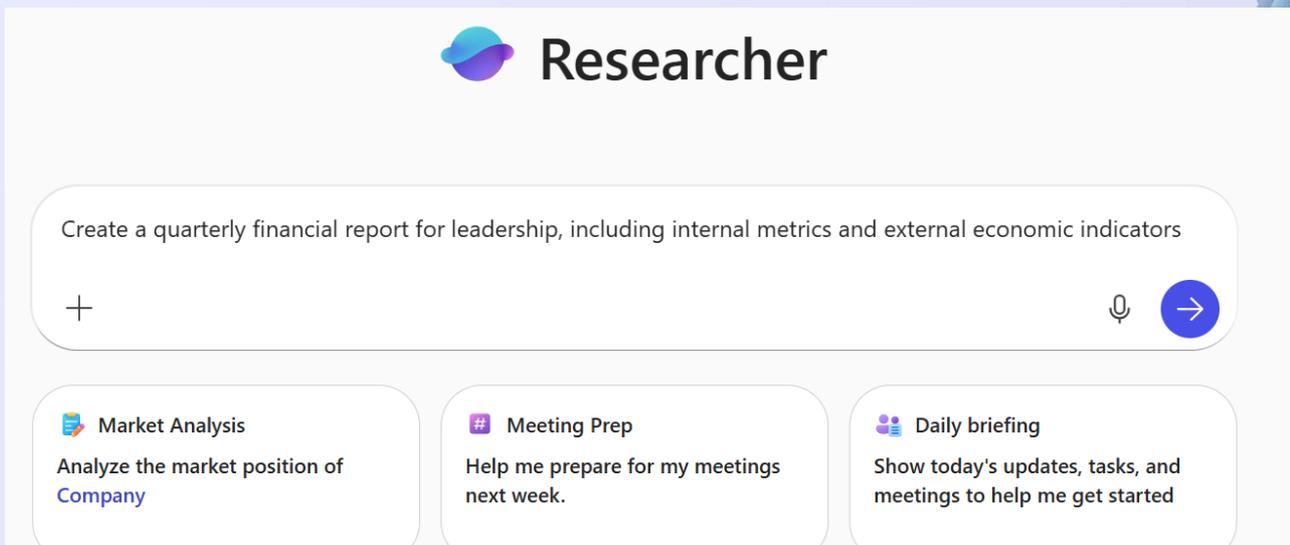
### Finance prompts suggestions for Researcher

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- “Analyze internal financial performance and compare it with market trends to identify investment opportunities.”
- “Create a quarterly finance report for leadership, including internal metrics and external economic indicators.”
- “Research emerging fintech trends and assess their impact on our current financial strategy.”



- “Identify gaps in our financial services portfolio based on competitor offerings and customer feedback.”



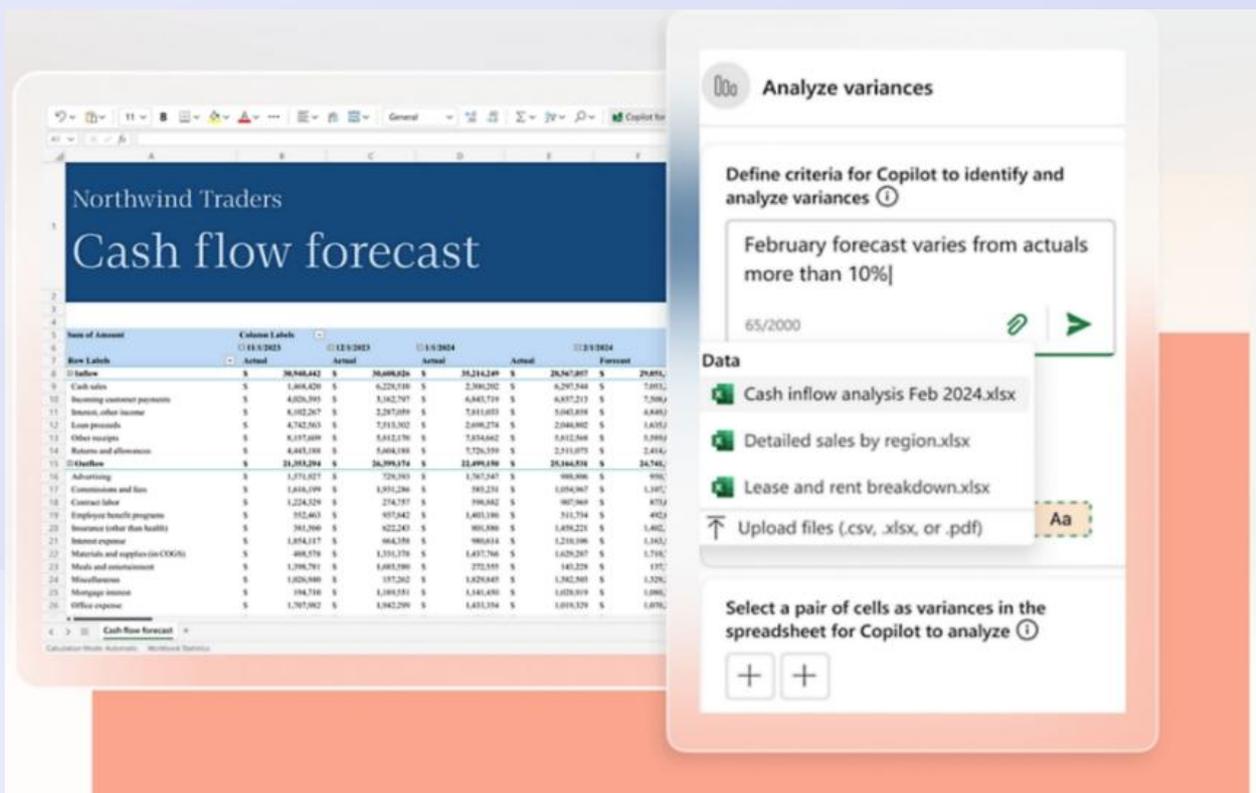
## How are we using Researcher in Microsoft Finance?

***“Our Finance Strategy and Controllership teams have embarked on the Researcher agent to consolidate and analyze large volumes of financial and operational data. By leveraging this tool, we efficiently synthesize internal metrics and external benchmarks to support annual planning, scenario modeling, and the preparation of executive communications. This supports us to deliver actionable insights for leadership and drive informed decision-making across the organization.”***

- Eric Oh, Finance Director,  
Microsoft Customer and Partner Solutions

## 3. Streamline variance analysis with Finance in M365 Copilot

Our last Microsoft AI solution for this brief is Finance in M365 Copilot. It's an AI assistant tailor-made for Finance professionals, trained and designed to support finance-specific work. Finance professionals can use it to automate variance analysis in Excel, highlight monthly changes, summarize key drivers, and generate executive summaries for leadership. It can also help analyze departmental spending, identify anomalies in cost centers, and recommend follow-up actions.





## Finance prompt suggestion for Finance in M365 Copilot to streamline Variance Analysis

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- "Find variances above average in the second quarter."
- "Identify largest variances between actuals and forecasts within the first month of the fiscal year."
- "Show per period variances exceeding 10%."
- "Visualize monthly cash flow and highlight anomalies."

## How are we streamlining variance analysis in Microsoft Finance?

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***"Our FP&A and business finance teams use Finance in M365 Copilot to quickly identify and explain drivers behind year-over-year and budget-to-actual variances. By setting focused parameters, the Finance solution produces concise reports that pinpoint revenue growth factors, cost fluctuations, and operational trends. This serves as the starting point for deeper analysis, helping our teams to quickly deliver clear, data-driven narratives for management reviews and forecasting discussions."***

- David Hedlund, Group Finance Manager,  
Microsoft Commercial Products and Infrastructure

## Streamline reconciliation with Finance in M365 Copilot

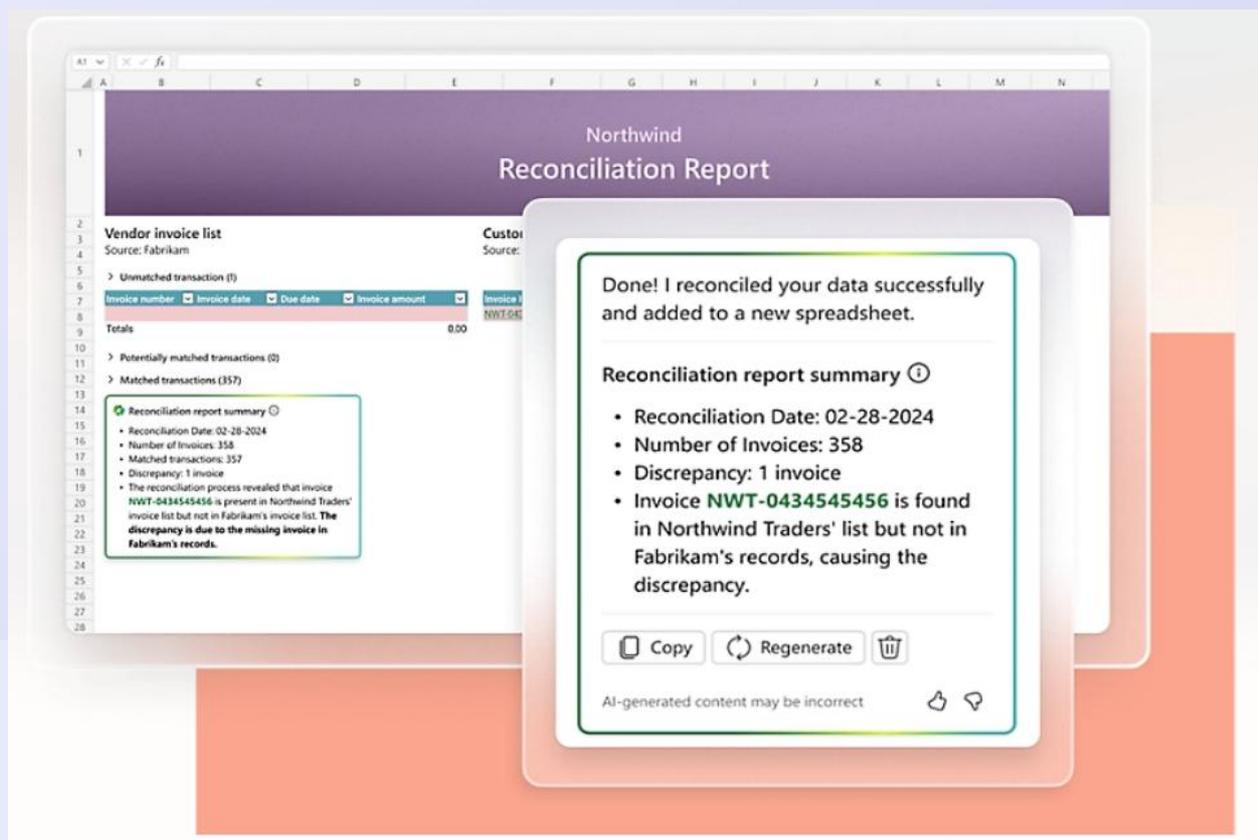
Finance in M365 Copilot can also take manual work that used to take hours and make it invisible. This finance role-based agent accelerates reconciliation by automating the matching of transactions, flagging discrepancies, and preparing detailed reports. Finance professionals can efficiently review transactions across systems to identify anomalies, risks, and unmatched data. The agent also enables the use of customizable templates for scalable



insights, ensures meticulous trackability for audit purposes, and empowers users to retain responsibility for final data outcomes by providing transparent explanations and summaries of all calculations performed.

## Automate reconciliation report generation

Finance professionals can automate the delivery of reconciliation reports to their mailboxes by scheduling Finance in M365 Copilot to generate email reports at regular intervals. This workflow streamlines communication, ensures timely resolution of issues, and maintains transparency throughout the reconciliation process.





## How are we streamlining reconciliation in Microsoft Finance?

***“Finance in M365 Copilot streamlines our Indirect Tax compliance processes by automating the matching of transactions across multiple accounts and systems. It accelerates the identification of unmatched items, automatically flags anomalies, and generates detailed reconciliation reports for our Tax professionals. By streamlining these processes, the Finance solution assists our subject matter experts in saving valuable time and supporting the continued accuracy and reliability of our compliance activities.”***

- Veselina Avramov, Senior Indirect Tax Technology Manager, Microsoft Worldwide Tax and Customs

## Conclusion

Microsoft's AI solutions like Analyst, Researcher, and Finance in M365 Copilot represent a significant advancement helping to accelerate various workflows within financial operations. Finance teams now have more time to focus on the most important work. We encourage you to dive in and explore these agents today!

## External References

- [Welcome to Finance agents](#)
- [Introducing Researcher and Analyst in Microsoft 365 Copilot | Microsoft 365 Blog](#)
- [Moving sales, service, and finance to the Frontier with Microsoft 365 Copilot](#)