

M I C R O S O F T C O P I L O T / L I V E T R A I N I N G

Online

60 mins

Instructor-led

Recordings available

# Microsoft Copilot

# Workflow Acceleration

## *for Investment Banking Analysts*

- ✓ Emails. Meetings. Documents. Presentations. Spreadsheets.
- ✓ Cut hours from correspondence, document review and deliverable production.
- ✓ AI embedded directly in the tools you already use every day.

## FRAMING

# Copilot isn't a chatbot. It's a workflow layer.

*The single most important reframe for this hour.*

## It lives where you already work.

Copilot is embedded directly inside Outlook, Teams, Word, Excel, PowerPoint and across them. It can summarise the email you're reading, the document you have open, the meeting you just left - and chain those together without you switching tools.

Workplace or web:



### THREE QUICK FACTS ON HOW IT USES YOUR DATA

- It uses Microsoft Graph and your existing permissions - your mailbox, your files, your chats.
- It cannot see anything you can't see. M365 information barriers still apply.
- Microsoft doesn't train on your tenant data. Your prompts stay inside your tenant.

### Where Copilot lives

■ Outlook	Triage, drafting, thread summaries
■ Teams	Meeting recap, catch-up, action items
■ Word	Memo drafting, summarisation, review
■ Excel	Explain model, sensitivity, drivers
■ PowerPoint	Doc-to-deck, slide outlines
■ Copilot Chat	Cross-app questions, your data

THE REALITY

# Where your hours go each week

*Most of the analyst week isn't analysis. It's correspondence, coordination and chasing the next version of a deliverable.*

**12+**

hours / week

in your inbox - triage, threads,  
follow-ups

**8+**

hours / week

in meetings or watching catch-up  
recordings

**10+**

hours / week

reading CIMs, IMs, NDAs and  
supporting docs

**20+**

hours / week

producing slides, models and IC  
materials

*The promise of this hour: an hour back from each of these. Not all today - but you'll know how by Monday morning.*

# Inbox triage in five lines, not fifty

## THE SCENARIO

You step off a flight with 84 unread emails across three live deals. You need to know what's actually on fire before the 9am stand-up.

## PROMPTS TO TRY

*“Summarise the unread emails from the last 24 hours by deal, flagging anything that needs my reply today.”*

*“Which emails are waiting on a response from me? Sort by sender seniority.”*

*“Catch me up on the Project Atlas thread - what's the latest open question?”*

## COPILOT / INBOX SUMMARY

### ● Project Atlas (sell-side)

Buyer 4 sent revised IOI at 8.5x; sponsor wants our recommendation by 4pm.

### ● Project Beacon (buy-side)

Management presentation moved to Thursday; deck draft owed to MD by Wed EOD.

### ● Project Crest (refi)

Lender comments on term sheet - three open items, none requiring escalation.

### ● Internal

Compliance reminder on the new conflicts log - 5-min action.

### ● Can wait

12 marketing emails and 4 newsletters bundled and marked read.

# Schedule it after you prompt it

## THE WORKFLOW

Once your message is drafted, use the clock icon to schedule delivery for later. This lets you respond promptly without sending immediately.

## PROMPT TO TRY

*"Draft a reply confirming we can send the updated materials tomorrow morning.*

*Keep it concise and professional."*

*Once you have written the prompt and hit enter, click the clock to schedule it.*

## WHY IT HELPS

### ● Draft message

Write the prompt clearly and state the outcome you want.

### ● Review draft

Hit enter, check the reply, and make any quick edits.

### ● Schedule send

Click the clock icon to schedule the prompt at a set time.

# Drafting in your voice - and three other voices

Copilot picks up tone from the thread and from your own sent items. Tighter prompts produce tighter drafts. Tone transformation is the move nobody uses.

## WEAK PROMPT

*“Reply to this email.”*

No role, no outcome, no constraint, no context. You will get back something generic and you will rewrite all of it.

## STRONG PROMPT

*“Review the last 12 months of my emails and summarize my internal email tone and my client email tone as two prompts I can use.”*

*“Draft a reply to the sponsor confirming we can hold kickoff to Tuesday, asking them to circulate the data-room link by Monday, copy my MD. Three short paragraphs, my usual tone.”*

## TONE TRANSFORMATION

### Same draft. Three audiences. One prompt away.

#### Analyst tone

*“Rewrite this as a direct, factual update.”*

#### MD tone

*“Rewrite this in a senior, concise MD voice.”*

#### Client-ready

*“Rewrite this for the sponsor - polite, precise, no internal jargon.”*

# Pull deal context across every thread

Copilot reaches across your mailbox, calendar and Teams chats - your single source of truth on where a deal stands.

## PROMPT

*“Summarise everything I have on Project Atlas in the last two weeks - emails, meetings and Teams chats. Tell me what's been agreed, what's outstanding, and who owns each open item.”*

### FROM YOUR INBOX

**42 emails**

across 6 senders, 3 threads

### FROM YOUR CALENDAR

**5 meetings**

2 internal, 2 sponsor, 1 lenders

### FROM TEAMS CHATS

**118 messages**

in the #atlas-deal channel

## COPILLOT OUTPUT

<b>Agreed</b>	Valuation range 8.0x-9.0x; exclusivity to buyer 4 if IOI raised by Friday.
<b>Outstanding</b>	QofE scope (sponsor); KMP retention (target CFO); legal DD timing (counsel).
<b>Owners</b>	QofE > you by Wed; KMP > MD by Thu; legal timing > counsel call Friday 10am.

# Search across your work without hunting for it

Copilot searches your emails, meetings, chats, calendar and files—use plain English to find people, moments and availability.

## FIND PEOPLE AND CONTEXT

### Know who you are meeting

Use search-style prompts to identify people fast and pull together relevant context before your next conversation.

- *“Who is [x]?”*
- *“Pull together what I need to know before my next meeting with [x].”*
- *“Who knows the most about [topic] at our company?”*
- *“Find shared documents or past discussions about [account or project].”*

## FIND MOMENTS AND TIME

### Recall interactions and availability

Be specific on person, date range or topic to surface the right meeting, chat, email or free slot.

- *“When did I meet [x]?”*
- *“What free slots do I have next week?”*
- *“Find the last email, meeting or chat where [topic] came up.”*
- *“What decision or action came out of my last meeting about [topic]?”*

# Recover the meetings and channels you missed

Two scenarios that hit every analyst every week. Both are solved by the same Copilot side panel.

## IF YOU MISSED THE MEETING

### Recover it in 30 seconds

From the meeting recap or chat panel, ask Copilot to brief you like a colleague would:

- *"Summarise the meeting in 5 bullets for someone who wasn't there."*
- *"What did [name] say about pricing?"*
- *"Give me only the action items assigned to me, with deadlines."*
- *"Did anyone raise a concern about timing?"*

## IF YOU MISSED THE CHAT

### Catch up on a deal channel

Open any Teams channel and ask Copilot to summarise - by date, by topic, or by who needs you:

- *"Summarise this channel for the last 7 days."*
- *"Has anything been agreed about the data room?"*
- *"Who's chasing me for something?"*
- *"Give me the three open questions still in this thread."*

# Turn on transcription and pull forward last week's action points

Microsoft Copilot for Investment Banking Analysts – Live Training, 60 mins

## SET UP THE TRANSCRIPT

### Turn on transcription

Start transcription at the beginning so Copilot can capture the full discussion and support live follow-up during the call.

- *Meeting doesn't need to be recorded for the transcription to work.*
- *However, participants will get notified when someone turns on transcription.*

*Start transcription at the start of the meeting.*

- *Use live transcription to follow the conversation in real time.*

*"Recap the meeting so far." or "What did I miss in the last 5 minutes."*

## PULL FORWARD LAST WEEK'S ACTIONS

### Summarise the prior transcript

Open the prior transcript or recap and ask Copilot to extract the action points, owners and deadlines that matter now.

- *"Summarise last week's action points from the transcript."*
- *"Give me the action items, owners and deadlines from the last meeting."*
- *"What was assigned to me last week?"*
- *"Which action points are still open from the prior transcript?"*

# During the meeting - your quiet co-pilot

*Copilot runs alongside the live transcript in any recorded Teams meeting. You ask questions in the side panel. Nobody else sees your prompts.*

## JOINED LATE

*“Summarise the call so far in 4 bullets.”*

## LOST THE THREAD

*“What point are we currently debating?”*

## PRESSURE-TEST

*“Have any of my open questions been answered yet?”*

## CAPTURE THE ASK

*“Draft the email I should send after this call.”*

*Etiquette: treat Copilot like a notebook, not a microphone. Use it to listen better - not to outsource the conversation.*

THE CENTREPIECE

# Friday, 9pm: the cross-app workflow that takes 90 minutes down to 25

One scenario. Five steps. The same context carried by Copilot from inbox to deck to spreadsheet and back.



***From 90 minutes on a Friday night to 25. The hour you got back goes into the analysis the MD will actually grade you on.***

# Word, PowerPoint and Excel - the move worth knowing in each

Three apps, three moves. No tour - just the prompt that earns its keep on every deal.

## WORD

### Compare two versions

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#### THE PROMPT

*"Compare this CIM to the previous version. Summarise what's changed and which changes are material."*

#### WHY IT EARNS ITS KEEP

Kills the version-diff exercise on every revised CIM, IM, term sheet or memo. The one move that pays for the Copilot licence on its own.

## POWERPOINT

### Doc to deck outline

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#### THE PROMPT

*"Turn this Word memo into a 10-slide pitch outline with titles and 3-bullet talking points per slide."*

#### WHY IT EARNS ITS KEEP

The single biggest pitchbook accelerator. You still own the design and the story - Copilot ends the blank-canvas problem.

## EXCEL

### Interrogate, don't write

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#### THE PROMPT

*"Explain what this formula does. What are the three biggest drivers of projected P&L in this model?"*

#### WHY IT EARNS ITS KEEP

Don't use Copilot to write formulas. Use it to interrogate models other people built - especially when you inherit a model 24 hours before IC.

WHAT PEOPLE DON'T KNOW

# Five techniques that separate the analysts who win the hour back

*If you take only one slide home, take this one.*

- 1 Tone transformation**

Same draft, three audiences. Ask: “rewrite this as analyst / MD / client-ready.” Stops you reworking drafts for 20 minutes.
- 2 Prompt chaining**

First prompt rarely lands. Refine three times: shorter, sharper, more direct. The third version is the one you keep.
- 3 Context awareness**

Copilot sees the file you have open. “Summarise THIS document” is faster than pasting. Use the file you're in.
- 4 Copilot for thinking, not just drafting**

“What's missing in this analysis?” “What would a sceptical MD challenge?” More valuable than “write this for me.”
- 5 Start messy, end structured**

Voice-note rough thoughts on a call. Ask Copilot to turn them into a memo, an email, a slide. Lowers the activation energy of writing.

# Use Copilot as your coach - and teach it your voice

Stop asking Copilot to draft. Ask it to critique you, then teach it your tone once - and forget about it.

## AS A COACH

### Critique my last email

#### HOW

*“Review the last reply I sent to the sponsor on Project Atlas. What would a more senior banker have changed?”*

#### WHY IT'S WORTH IT

Use Copilot to grade your own writing. The improvements compound across hundreds of emails.

## THE ADJUST BUTTON

### Custom tone, one click

#### HOW

*On any draft, hit Adjust > Custom and type: “Rewrite in the style of a message to a VP / MD / CEO.”*

#### WHY IT'S WORTH IT

Quick tone tweaks without rewriting your prompt. Lives next to the Concise / Professional / Confident presets.

## CUSTOM INSTRUCTIONS

### Teach it your voice once

#### HOW

*Settings > Personalisation > Custom Instructions. Anchor your voice and rules so every prompt inherits them.*

#### WHY IT'S WORTH IT

Example: “Draft in the style of my last 12 months of emails. Strict rules: no emdashes. Prioritise my manager. Internal sources only.”

# Three features hiding in plain sight

Tucked under menus and dots. Each one shifts how often you reach for Copilot in the first place.

## FEATURE 1

### Prompt Gallery

#### WHAT IT IS

Save your highest-impact prompts. Microsoft also publishes evolving suggested prompts (Suggested tab).

#### WHERE TO FIND IT

Chat panel > 3-dots menu > Prompt Gallery

#### HOW TO USE IT

Pin your best prompts: weekend triage, MD-tone rewrite, version-diff, action-items-for-me.

## FEATURE 2

### Prompt Scheduling

#### WHAT IT IS

Set a prompt to run automatically at a recurring time. Answer is waiting in your inbox.

#### WHERE TO FIND IT

After running a prompt, hit the 3-dots > Schedule this prompt

#### HOW TO USE IT

Schedule the weekend-email-review prompt for 7am every Monday. Your stand-up brief writes itself.

## FEATURE 3

### Model Selection

#### WHAT IT IS

Choose between Quick Response (fast / simple) and Think Deeper (slow / harder reasoning) per query.

#### WHERE TO FIND IT

Top-right dropdown in Copilot Chat: Auto / Quick / Think Deeper / GPT versions

#### HOW TO USE IT

Default Auto is fine. Switch to Think Deeper for analytical tasks: comp pulls, market structure, due-diligence questions.

# Copilot Agents - when chat isn't enough

*The next step up from the chat panel. Purpose-built assistants for specific, repeatable tasks.*

## What an Agent actually is

A Copilot Agent is a focused version of Copilot tuned for a single task - with its own prompt scaffolding, data sources and (sometimes) tools. It runs in the same chat interface, but it knows what it's there to do before you type anything.

### TWO PLACES TO LOOK

- **Microsoft pre-built agents**

Analyst, Researcher, Sales Agent and others. Built by Microsoft, available in your tenant if your IT team has switched them on.

- **Your firm's custom agents**

Your bank may already have internal Agents for pitchbook formatting, comp pulls, market scans or KYC. Worth asking IT or your Copilot champion what's deployed.

### WHEN TO REACH FOR AN AGENT

## Not for everything.

- The task is repetitive (you do it the same way every week).
- The task is structured (consistent inputs, consistent outputs).
- The task benefits from specialist knowledge or tools the chat panel doesn't have.
- You'd otherwise write a long, identical prompt every time.

# MNPI, client data and what stays where

*Copilot is a productivity tool, not a compliance officer. The same rules that govern your inbox govern your prompts.*

## **Boundaries are your firm's, not Copilot's**

If you can't share it with a colleague on a different deal team, you can't paste it into Copilot Chat on a different deal team. Information barriers in M365 still apply.

## **Treat outputs as drafts, not facts**

Copilot can misattribute, hallucinate names, and overstate confidence. Anything to a client, an MD or a regulator gets read line-by-line before it leaves your screen.

## **Recording isn't consent**

Transcripts are powerful but covered by your firm's recording and retention policies. Don't summarise calls that weren't supposed to be recorded in the first place.

*When in doubt, escalate. Compliance would rather answer a question now than untangle a problem later.*

CLOSE

# Five things to try Monday morning

1

Open Outlook and ask: "Catch me up on this weekend's emails by deal."

2

On your next reply, ask: "Draft this in three short paragraphs in my MD's tone."

3

Pick a Teams meeting you missed and ask for the recap and your action items.

4

On a CIM you're reviewing: "Compare this version to the previous one. What's material?"

5

Once a week: "What's missing in this analysis? What would a sceptical MD challenge?"

## Q&A

### Bring one stuck workflow

What do you do every week that you'd happily never do again? Let's prompt it together.

### THE TAKEAWAY

*The best analysts won't use AI - they'll redesign how they work around it.*