

CREATE **Intermediate** 40 MIN · UPDATED 2026-10-01

Build a business case automatically from emails and financial records.

Have Copilot pull a project brief together from emails, competitive research, and financial records instead of assembling it by hand from five different places.

MICROSOFT 365

Outlook

Excel

Word

WORKS WITH

Copilot

Business Outcome

A first-draft business case ready for review in under an hour instead of a half-day of manual assembly.

Workflow Steps

Step 1: Point Copilot at the relevant emails and records

Outlook

Search Outlook for the specific threads tied to this decision (by subject, participant, or date range) and note which ones actually matter.

Forwarding Copilot an entire inbox folder that includes tangential conversations lets it pull in context that looks relevant but argues a slightly different case than the one you're actually making.

Step 2: Ask for a structured brief, not a generic summary

Copilot

In the Copilot pane, name the exact sections you want up front — Problem, Options Considered, Recommendation, Financial Impact — and ask it to cite the source email or record next to each claim.

A prompt that just says "summarize this" tends to produce a loose narrative that reads fine but doesn't map onto the approval format anyone reviewing it expects.

PROMPT

Using these emails and the attached financial records, draft a project brief covering: the problem, the options we discussed, our recommendation, and the expected financial impact. Cite the source for every factual claim.

Step 3: Verify every cited figure against its source

Excel

Open the actual spreadsheet or financial record behind each number the draft cites and check it matches exactly, not approximately — a citation only makes a brief more trustworthy if someone has actually confirmed it points to the right number; an unchecked citation is just a confident-sounding footnote.

Step 4: Route to whoever owns the final decision

Word

Confirm the actual approval threshold and who signs off at that level before finalizing the brief's level of detail — a one-page summary pitched at an executive who needs the full financial model back-and-forth slows the decision down just as much as a 10-page brief sent to someone who only needed the headline number.



✓ Check the work

- Every factual claim in the brief traces back to a real email, record, or note.
- Financial figures match their source records exactly.
- The recommendation section states a clear decision, not just options.

Expected Outcome

A structured project brief in Word, with every claim traceable to its source email, record, or research note.

Want help rolling this out across your team? **Go to Liminals.Tech** ■