

AUTOMATE

Advanced

60 MIN

· UPDATED 2026-09-30

Delegate a full executive report to Copilot Cowork.

Give Copilot Cowork a detailed brief for a report drawing on months of data and get back a completed deliverable to review, not just a draft outline.

MICROSOFT 365

Word

Excel

WORKS WITH

Copilot Cowork

Business Outcome

A completed executive-ready report produced without a person assembling it from scratch, freeing that time for review and judgment calls instead of compilation.

Workflow Steps

Step 1: Write a brief as detailed as you'd give a skilled analyst

Copilot Cowork

Spell out the report's audience, required sections, the specific data sources to draw from, the time period covered, and any formatting standard (house style, required charts) — Cowork executes the brief you give it, so vague instructions produce a vague report.

Step 2: Point Cowork at the real source data

Copilot Cowork

Give it access to the actual underlying files and locations (the quarterly financials workbook, the project tracker, last quarter's report as a style reference) rather than summarized inputs, since the value here is it doing the synthesis work itself.

PROMPT

Build a Q3 board report covering revenue performance by region, the top 3 project risks from the program tracker, and headcount changes. Use the same structure as last quarter's report, pull numbers from the finance workbook and project tracker, and flag anything you can't find a source for instead of estimating.

Step 3: Let it run, then review the finished deliverable

Copilot Cowork

Unlike a quick prompt-and-check cycle, this is meant to run unattended on a substantial task — review the completed report as a whole deliverable, checking structure and figures rather than babysitting the process.

Step 4: Verify before it reaches executives

back in Word

Treat the output as a strong first draft from a new analyst, not a finished, trusted report — every number and claim needs verification before it goes in front of leadership.

✓ Check the work

- Reconcile every headline figure in the report against the actual source file it claims to be from.
- Confirm any flagged "couldn't find a source" gaps are genuine gaps, not something Cowork simply missed in a large file.
- Check that no section silently blends data from two different time periods.



Expected Outcome

A complete draft report – structured, sourced, and formatted – ready for an executive review pass rather than a first-draft outline.

Want help rolling this out across your team? **[Go to Liminals.Tech](#)** ■