

RESEARCH

Advanced

20 MIN

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Summarize a long annual report into drivers, risks and recommendations.

Upload a dense annual report and get a tabulated summary of performance drivers, risk analysis and recommendations.

MICROSOFT 365

Word

WORKS WITH

Claude

Copilot

Business Outcome

The key takeaways from a 100+ page report in minutes, without reading the whole thing to find what matters.

Workflow Steps

Step 1: Use a structured prompt framework, not a vague "summarize this"

Word

Decide the three categories you actually need before writing the prompt — drivers, risks, recommendations is the default, but swap in whatever framework matches the decision this summary needs to support.

A specific framework produces a genuinely usable table; "summarize this" produces a generic paraphrase that still requires a full read to extract what you actually needed.

Step 2: Ask for the structured breakdown

[Copilot](#)[Claude](#)

Point Copilot at the full report and ask for the three categories explicitly, with page references so you can go back to the source for any item.

PROMPT

Summarize this annual report into a table with three sections: key performance drivers, top risks identified, and any explicit recommendations. Cite the page number for each item.

Step 3: Check the highest-stakes items against the source

[Word](#)

For anything you're about to act on or repeat externally, open the cited page and confirm the summary is accurate — a 100-page report compressed to a table will lose nuance somewhere.

Step 4: Note what the summary necessarily left out

[Word](#)

A structured summary is built for speed, not completeness — if you need the full nuance on one section, go read that section directly.

✓ Check the work

- Open the cited page for any risk or recommendation you're about to act on.
- Confirm the summary didn't flatten a nuanced or conditional statement into an absolute one.
- Check the report date/period — don't treat an old annual report's numbers as current.

Expected Outcome

A tabulated summary of the report's key performance drivers, risks, and investment recommendations.

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