Copilot scenarios for
HR

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Overview and KPIs

KPIs play a crucial role in organizations, providing a compass to navigate toward success. Let's dive into KPIs for Human Resources and how Copilot can assist.

Use Case by Role

Copilot can simplify the tasks that execs perform every day. Look at key use cases and how Copilot can be your AI assistant along the way.

Day in the Life

See how real-life HR employees are using Copilot in their day to day.

Using Copilot in HR

Goals and challenges

With changing worker expectations, multi-generational workforces, and hybrid workplaces it's becoming harder to keep talented people. AI is transforming HR by enabling predictive learning. Copilot can help to simplify access to data, improve quality and increase creativity, resulting in improvements to essential key performance indicators.

- Improve organizational agility
- Transform employee experiences
- Optimize HR programs
- Discover workforce insights

Copilot can assist with ...

Copilot helps you improve retention, while reducing costs by improving organizational agility, optimizing HR programs, using workforce insights, and transforming employee experiences.

- Managing internal job transitions
- Augmented hiring workflows
- Improved benefits and compensation processes

HRroles

- Talent Acquisition
- HR Compliance
- Planning and business alignment
- Employee Development

Microsoft Copilot opportunity to impact key Industry KPIs

Cost per hire
Employees improve the hiring process by using Copilot to help write job descriptions, summarize interviews, avoid bias when identifying top candidates, improve candidate communications, and improve onboarding processes.

Employee turnover rate
Copilot can help all employees get more satisfaction in their job by reducing boring or stressful tasks, work on higher value activities. It also makes many tasks faster, which can reduce overtime requirements.

Improved onboarding time
Speed time to value of new employees by simplifying access to information and training.

Accelerate growth   Cost savings and avoidance   Employee retention

KPI – Cost per hire

Employees improve the hiring process by using Copilot to help write job descriptions, summarize interviews, avoid bias when identifying top candidates, improve candidate communications, and improve onboarding processes.

How Copilot can help HR managers

Improve quality of recruitment experience and materials
- Improve job descriptions
- Improve interviews with summarization and recap
- Improve quality of emails and chats with candidates

Improve employee meetings
- Organize information from past interactions
- Completely focus during the meeting

Create internal feedback loop
- Draft candidate and new employee surveys
- Analyze surveys to gain valuable insights into what makes employees happy or areas that need improvement within the organization

Roles

- Human Resource Managers
- Department Hiring Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot
- Microsoft Copilot Studio

KPI – Employee turnover rate

Lowering the employee turnover rate is important for reducing costs, but also for overall employee morale.

How Copilot can help employee turnover rates

Improve quality of internal materials and processes

- Improve job descriptions for further role clarity
- Improve company meetings with summarization and recap
- Completely focus during the meeting

Improve employee collaboration

- Use Copilot in Loop to drive internal collaboration
- Use Copilot to surface ice breakers

Create internal feedback loop

- Draft employee surveys
- Analyze surveys to gain valuable insights into what makes employees happy or areas that need improvement within the organization

Roles

- Human Resource Managers
- Executive Leadership

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

KPI – Improve onboarding time

Reducing ramp up time is beneficial for everyone. It boosts employee confidence and engagement. It helps shorten the learning curve allowing employees to make an impact sooner.

How Copilot can help reduce onboarding time

Create onboarding materials
- Use Copilot to draft training guides
- Use Copilot to enhance employee handbooks

Improve onboarding process
- Generate onboarding documents and contracts
- Integrate relevant company policies and resources into the onboarding materials
- Draft check in emails to new hires to send during first 60 days on the job

Roles

- Human Resource Managers
- Department Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

Use Case | Managing internal job transitions

Potential benefits (Reduce time to hire) (Increase employee retention) (Reduce time to create documentation and training)

1. Reduce time to screen candidates

Reduces hours of manual screening to minutes. Indicate keywords from multiple documents to surface qualified candidates. Access HR system data using plugins built in Copilot Studio.

Copilot in Word
Copilot Studio in Copilot for Microsoft 365

Rapidly get up to speed on what candidates are most qualified for certain roles.

2. Schedule interviews efficiently

Use Copilot to schedule follow up interviews between candidates and the hiring manager.

Copilot in Outlook

Streamline scheduling multiple candidates for interviews by asking Outlook to identify and schedule interviews.

3. Create onboarding materials quickly

Use Copilot to create role-specific onboarding materials.

Copilot in Word

Reduce time to prepare onboarding documents leading to increased employee satisfaction and speed to onboard; helping employees' reach productivity quickly.

6. Automate performance review prep

Automate data collection and report generation for performance reviews.

Copilot in Word
Copilot in Excel

Compile data quickly and generate individual review reports to support the process.

5. Collect feedback on onboarding and training

Analyze employee survey data and summarize key findings to refine delivery and relevance.

Copilot in Excel

Focus on overall employee satisfaction and onboarding experience by responding to feedback and refining onboarding and training.

4. Develop training material

Build training materials that are tailored to each role and employee.

Copilot in PowerPoint

Keep training relevant to the audience by using Copilot to mine historical documents to update with relevant training content. As internal systems change training can adapt to it more quickly.

Use Case | Augmented hiring workflow

Potential benefits   Find more qualified candidates   Streamline interview process and communication for group interviewing   Reduce cost of onboarding

1. Create a job description

Starting from a blank document, prompt Copilot in Word.

Copilot in Word

Create a job description by asking Copilot in Word to suggest skills, qualifications, and responsibilities.

2. Discover qualified candidates

Prompt Copilot in Microsoft Copilot.

Copilot

Discover the best candidates for a position by having Copilot extract skills, experience, and qualifications from a set of resumes.

3. Create interview questions

Prompt Copilot in Loop to create a set of interview questions.

Copilot in Loop

Create interview questions based on unique job requirements then crowdsource additional ideas and have Copilot create a final list.

6. Create onboarding materials

Starting with a new presentation, prompt Copilot.

Copilot in PowerPoint

Create powerful onboarding materials in PowerPoint.

5. Create an offer letter

Starting in a new email, prompt Copilot in Word.

Copilot in Word

Command Copilot in Word to draft a customized offer letter based on your inputs.

4. Conduct an interview

During the interview, prompt Copilot in Teams.

Copilot in Teams

Conduct a group interview in Teams and ask Copilot to summarize the contributions of each candidate.

Use Case | Streamline benefits and compensation

Potential benefits   (Improve talent retention)   (Attract the right talent)   (Improve employee satisfaction)   (Align HR strategy to company strategy)

1. Conduct market research

Research the latest industry trends and data regarding competitive compensation rates and benefits.

Copilot

Use Copilot to quickly generate tables of average salaries by market for different roles.

2. Draft Executive Summary for talent planning

Leverage market information to draft a plan the executive staff can consider for next fiscal year.

Copilot in Word

Turn a few thoughts on the data collected into a detailed planning document.

3. Ensure retention and employee satisfaction

Discuss the model for the retention and satisfaction strategy.

**Copilot in Excel
Copilot in Teams**

Make rapid updates to the financial model with Copilot and then have Copilot document an action items when the meeting is over.

6. Communicate to department managers

Communicate changes to departments and monitor employee engagement.

Copilot in Outlook

Draft an email to a group of department managers that provides detail and timelines regarding employee annual reviews and changes to the overall compensation and benefits.

5. Revise policy document

Use Copilot to revise relevant sections of the compensation policy document.

Copilot in Word

Use Draft with Copilot to turn the bullet points from the executive presentation into text for the policy document.

4. Incorporate changes into HR strategy

Generate an executive presentation detailing how the compensation strategy will align to the business need for growth and cost management.

Copilot in PowerPoint

Use Copilot to create a set of slides from the meeting notes to document the strategy and then copy in the Excel charts.

A day in the life of a HR Manager

Omar
leads HR for a regional bank

8:00 am

Omar starts the day at home with an interview for a new teller candidate. He commands Copilot to suggest follow up questions and summarize the key points the candidate made.

Copilot in Teams

What are some good follow up questions to learn more about this person's skills and experience?

9:35 am

At the office Omar summarizes some chat threads that occurred overnight at a subsidiary and can quickly assess the situation and provide guidance to his team to address the issue.

Copilot in Teams

Summarize this thread and include the key issues and suggestions for resolution along with who had the suggestions.

10:00 am

Omar asks Copilot to create a summary of the organization's new compliance handbook to ensure it has the key points. He then commands Copilot to fill in the missing sections.

Copilot in Word

Summarize the Contoso Compliance Handbook in about four paragraphs for an executive and provide a list of key points.

4:00 pm

Omar has missed a few calls and emails. He commands Copilot to summarize the email threads and then uses the summaries to draft responses.

Copilot in Outlook

Summarize this thread.

2:00 pm

Omar commands Copilot to add a slide to his presentation that can be used to explain the team's initiatives.

Copilot in PowerPoint

Add a slide about potential HR initiatives.

1:00 pm

Omar queries his HR system dashboard using plugins built in Copilot Studio better understand attrition trends.

Copilot Studio in Copilot for Microsoft 365

Add a column that averages the other columns for each month.