Microsoft 365 Copilot

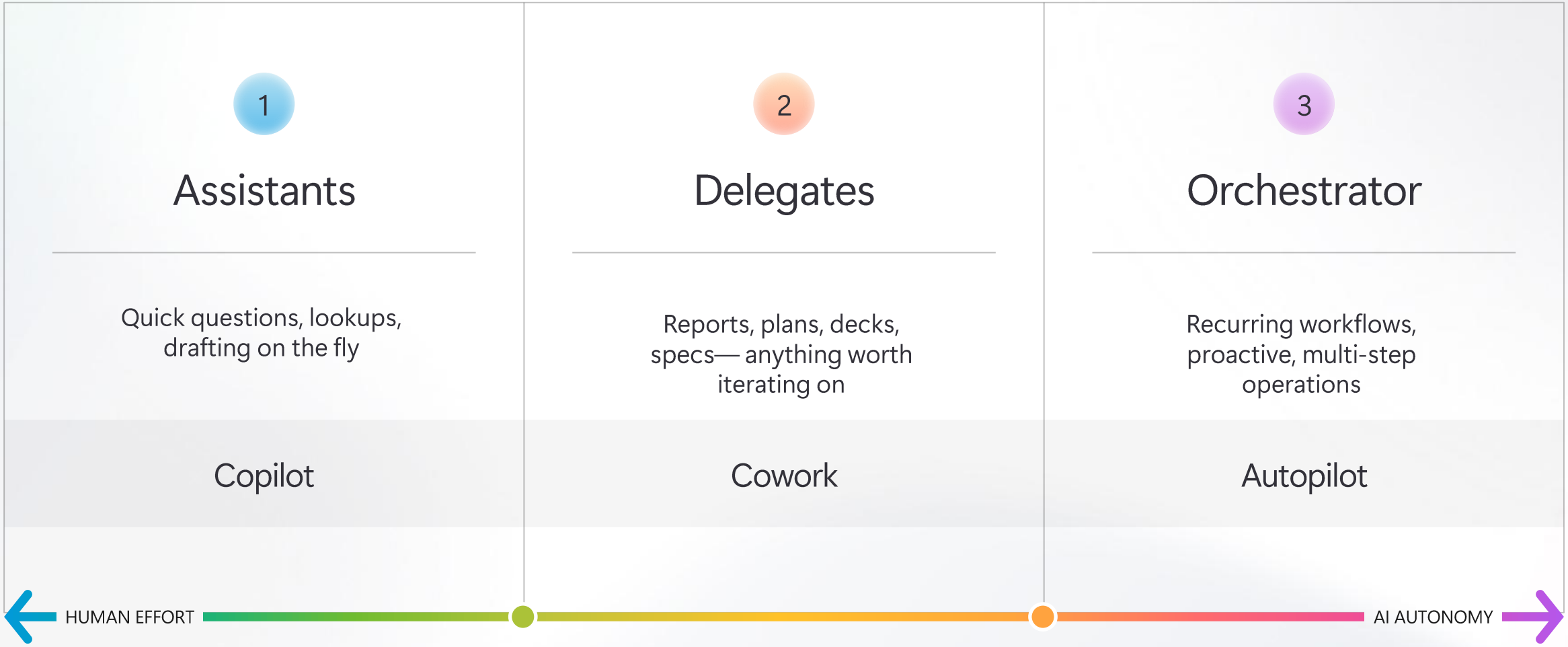
Demystifying CoWork

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Turn every employee into a force multiplier

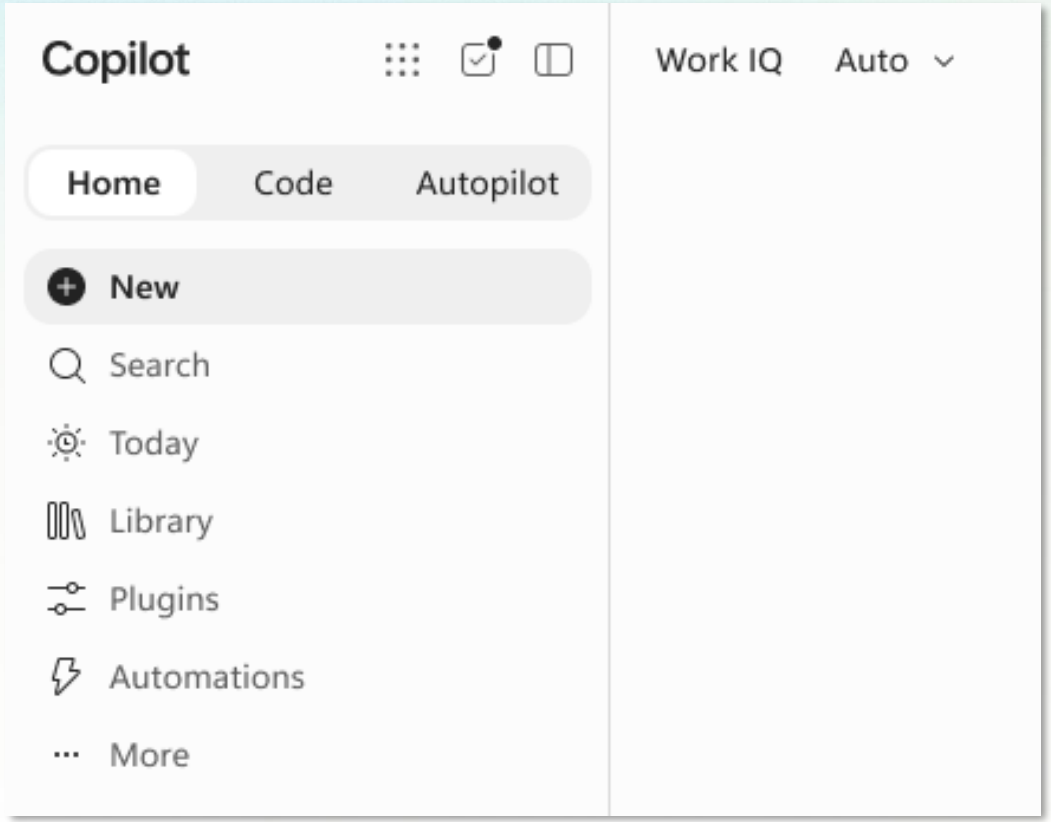
Augmenting work, delegating tasks, and automating entire workflows



Home

Chat and Cowork, together with the full power of Office.

- **Your starting place:** Chat for quick answers, Cowork for end-to-end tasks. And soon, Copilot will route the work for you.
- **Office in Copilot:** Live, editable Word, Excel, and PowerPoint files side by side in the Copilot app.
- **Coming soon — Today:** A proactive command center across mail, meetings, and tasks, that surfaces what needs attention and moves work forward



Why Microsoft for Cowork

01
MULTI-MODEL

Frontier capability, no single vendor risk

OpenAI, Anthropic, first-party Microsoft models, and more coming. We integrate the best of the industry.

02
AUTO-OPTIMIZED

The right model for every task

Orchestration layer routes tasks to model that's best for cost, performance, context. Customers get optimization they don't have to engineer.

03
FUTUREPROOF

We absorb every model leap

When the next breakthrough lands, we integrate it. No rip-and-replace. No re-architecture. The disruption hits us so it doesn't hit them.

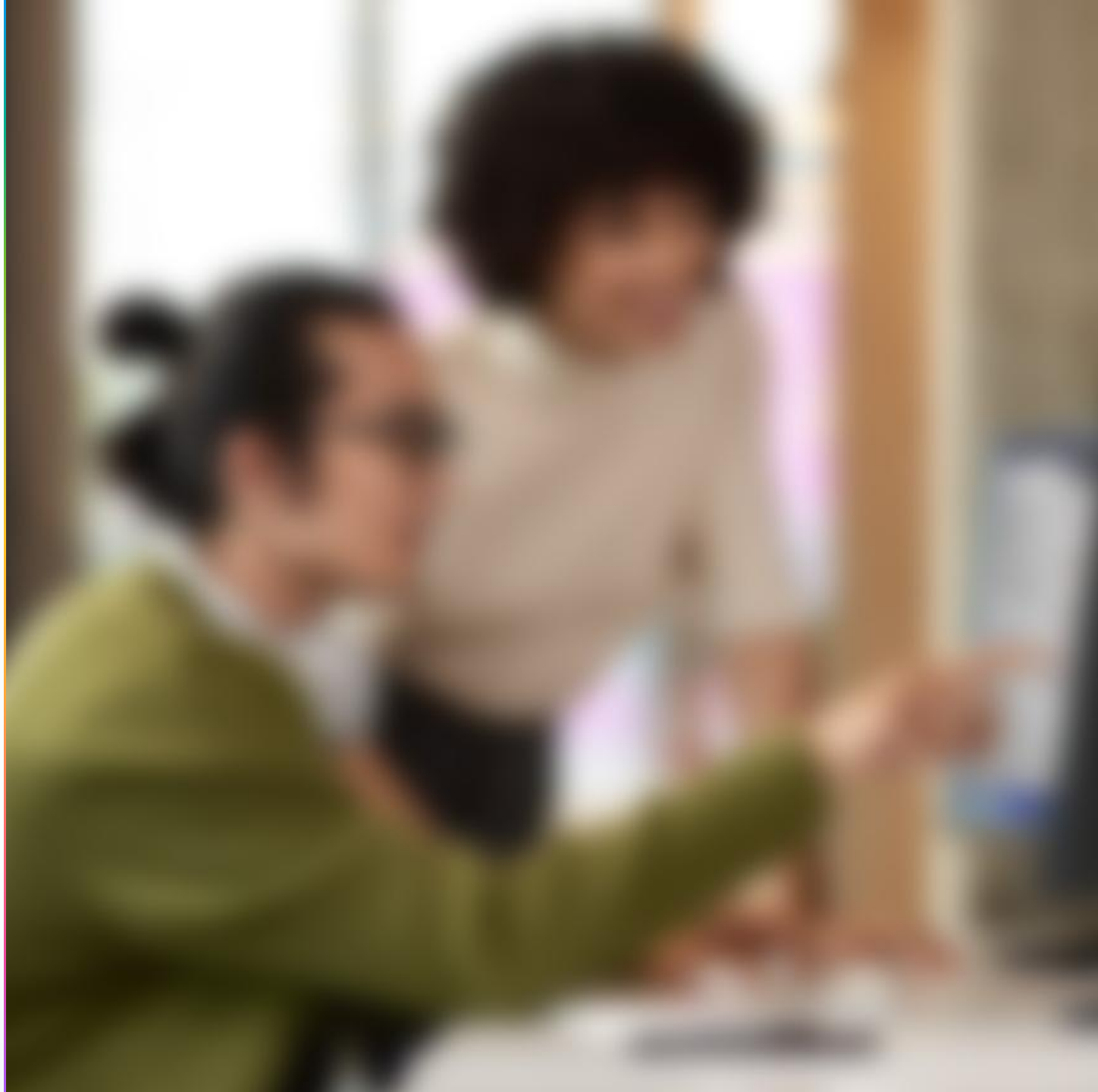
04
SECURE BY DESIGN

Agents governed like your people

Runs in Microsoft's cloud under each user's own identity and permissions. Purview labels, DLP and audit cover every action; Agent 365 extends Entra and Defender to every agent.

What is Cowork?

A quick overview of what Cowork is, within the entire Copilot ecosystem.



Cowork is for high-value jobs — not just creating an email

Copilot Cowork is Microsoft 365's enterprise-ready execution layer for **high-value work**:

- it delegates **complex**, **long-running**, **multi-tool** workflows
- to an agentic system grounded in **Work IQ**
- scaled through usage-based **FinOps controls**

Which job should be done using Cowork?

Prioritize **Heavy** and **Medium** ones

If you can do this on your own for less than an hour, Cowork is not the best fit!

Ok, got it!

A SIMPLE DECISION RULE

Use Copilot Chat when

Quick answers and lookups

What did we agree in this thread, what does this policy say, what is the acronym in this document - one question, one answer, done.

Drafting and rewriting text

Tighten this paragraph, make it warmer, turn these notes into bullet points, or adjust the tone for a completely different audience.

Thinking a problem out loud

Explore options, pressure-test an argument, or brainstorm names. Chat is cheap to try and easy to abandon when an idea does not work.

If you would be happy to receive the answer in the chat window itself, then you are in Copilot Chat territory.

A SIMPLE DECISION RULE

When to use Cowork

Signals that point to Cowork

The task has a clear definition of done. It needs several steps. It touches more than one app, file or source. It produces something you would attach to a mail or hand to someone else. You would be comfortable checking the result rather than watching it.

Typical Cowork deliverables

A consolidated document, a briefing pack, a set of draft messages, a status roll-up, a comparison across files, a proposed set of calendar changes. In each case the output is an artifact you review, not a sentence you read and then act on yourself.

The test that matters in practice: would you have asked a colleague to spend an hour on this? Then it is a Cowork task.

4 questions before you start

ASK YOURSELF	COPILOT CHAT	COPILOT COWORK
Do I know exactly what I want at the end?	Not yet, I am still working it out	Yes, I can describe the deliverable
Will I need to stay involved throughout?	Yes, I am in every turn	No, I describe it once and check back
What do I get?	Text / files I will read or copy	A finished file, set of files, an action taken...
Would I have asked a colleague to spend an afternoon on it?	No, I would have shouted it over the desk	Yes, I would have commissioned it

TELLS IN THE REQUEST ITSELF

“and... and... and...”

multi-step → Cowork

“all my...” “every...” “the last six months of...”

broad aggregation → Cowork

“what / when / who / does...”

a question → Chat

WORKED EXAMPLES

The same job, approached two ways

	IN CHAT	IN COWORK
Preparing for a meeting Chat helps you understand. Cowork produces the pack.	"What are the key points in this paper?"	"Using our briefing template, pull the last three papers, the decisions log and the open actions, and build the briefing pack with an evidence annex."
A recurring reporting cycle One summary is Chat. A multi-format pack is Cowork.	"Summarize this month's report."	"Take last quarter's returns, build the progress report against each commitment, an Excel of status and variance, and a six-slide readout."
Working through a volume of documents One item is Chat. Consistency across a collection is Cowork.	"Does this response support option two?"	"Work through every response, code each one by type and position, quantify the weight of opinion, and draft the summary with an exceptions list."
Inbox and calendar A lookup is Chat. Coordinated changes are Cowork.	"What is my first meeting tomorrow?"	"I will be out tomorrow. Set my out of office, reschedule my meetings and send apologies to the organizers."

What tool, when?

Choose between Copilot, Copilot in your apps, agents and Cowork — before you start.

Copilot

the everyday chat assistant

LIGHT

USE IT WHEN

You need a quick answer, summary or first draft, in the flow of a chat.

Can I get it in a single ask?

EXAMPLE

"Summarize this 30-message thread and draft a reply proposing Thursday."

Copilot in apps

help inside your files

LIGHT – MEDIUM

USE IT WHEN

You're in Word, Excel, PowerPoint, Outlook or Teams and want help in context.

Am I editing one file right now?

EXAMPLE

"In Excel, flag every invoice 30+ days overdue and pivot totals by vendor."

Copilot agents

a specialist for one job

MEDIUM – HEAVY

USE IT WHEN

You repeat the same scoped task and want a purpose-built helper on set knowledge.

Same specific task, again and again?

EXAMPLE

"Ask the HR-Policy agent how many carry-over leave days a France employee keeps."

Cowork

the agentic teammate

HEAVY

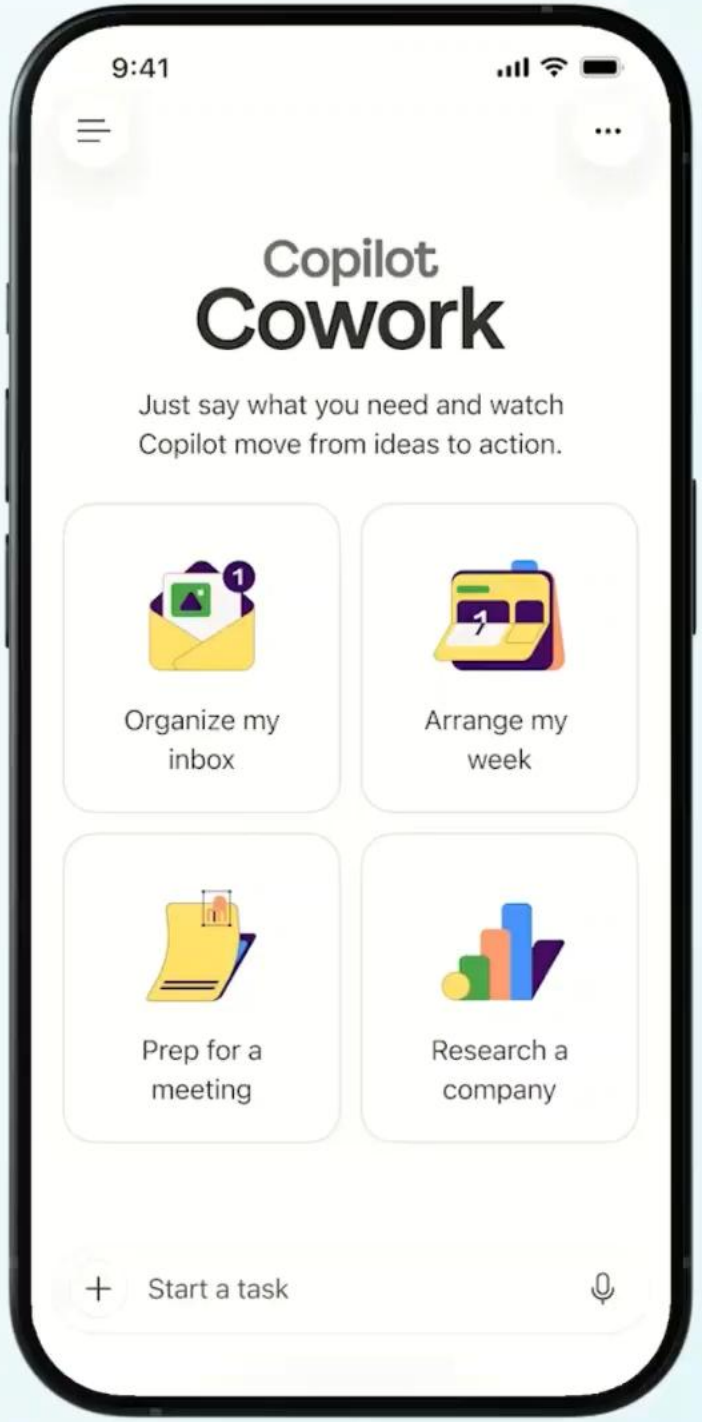
USE IT WHEN

A complex one-off — many sources, several deliverables, an hour or more of your time.

A big one-off across several tools?

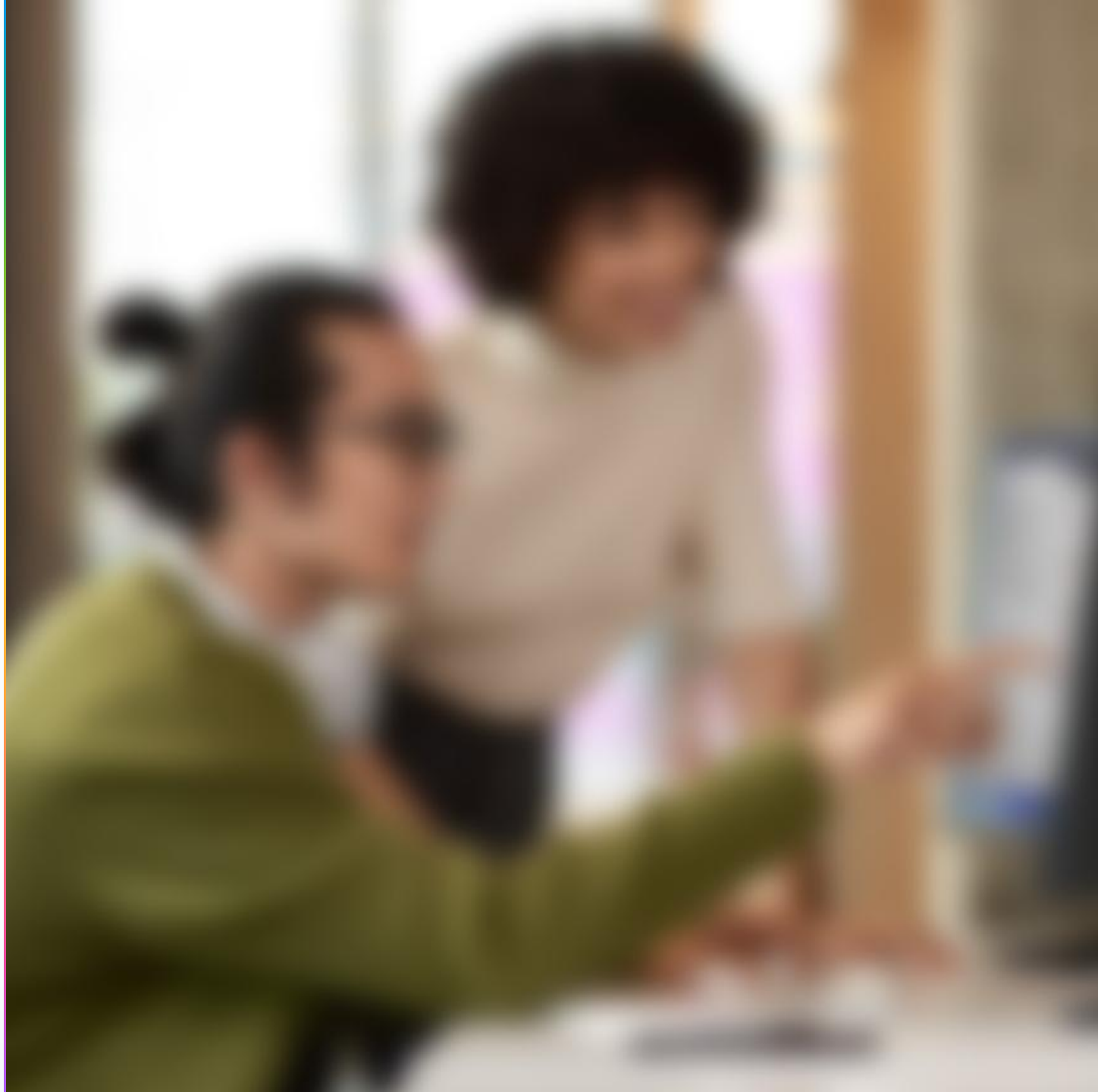
EXAMPLE

"Read our IT policy and past comms, then build the rollout pack: announcement, FAQ, briefing and a phased Excel plan."


9:41
Copilot
Cowork
Just say what you need and watch Copilot move from ideas to action.
Organize my inbox
Arrange my week
Prep for a meeting
Research a company
Start a task

High Value Use Cases

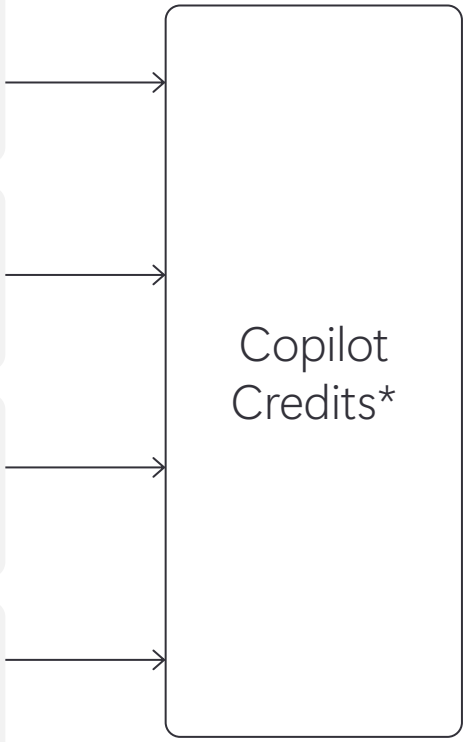
Focusing on what matters the most
for your organization.
Not the easy ones.



Copilot credits: usage from four inputs

The price for each task is calculated from four inputs: model use, context retrieval, tool calls, and runtime

Models	AI model chosen for each task, which can vary depending on the level of quality, speed, and cost the task demands.
Context	Understanding of the people, roles, and collaboration insights behind the work, drawn from emails, files, meetings, and past interactions.
Tools	Actions the system takes to get work done: Sending emails, scheduling meetings, up-dating documents, and more.
Runtime	A managed cloud orchestration that runs agents and keeps them working across tasks, including long-running work.



* 1 Credit = $0.01 in PAYG plan

Cowork Job types

From quick recurring wins to deep, multi-output analysis - scaled by sources, time frame, and deliverables

Light jobs

Leverages a handful of knowledge sources for a light reasoning scenario like a summary, usually resulting in one short deliverable.

- Few sources
- Light reasoning
- 1 or fewer outputs

Prompt example

“Create a weekly status update for my team that runs every Monday morning - including my top-of-mind priorities and a short list of key executive meetings pulled from my calendar.”

Est. Credits 100 - 300

Medium jobs

References many sources over varying timeframes, uses structured reasoning, and produces multiple deliverables.

- Many sources
- Structured reasoning
- 2+ outputs

Prompt example

"Help me prepare for a customer meeting by pulling relevant emails, calendar items, and recent files into a briefing doc based on our template, an Excel overview of sales and sales trends, and a client-ready presentation.”

Est. Credits 300 - 700

Heavy jobs

Requires deep analysis and broad source aggregation over long time frames, generating many outputs.

- Broad aggregation
- Deep reasoning
- Many outputs

Prompt example

“Analyze 6 months of exported product usage data to understand usage patterns, classify prompts, and produce a leadership-ready report … " (shortened)

Est. Credits >700

Use-cases for IT and Finance Professionals

PLAN & SEQUENCE AN IT ROLLOUT UNDER CAPACITY LIMITS

HEAVY IT

Prompt: *" Take [our user/asset inventory export — this CSV] and [our IT policies + past rollout comms in SharePoint]. Clean and de-duplicate the export, then group users into deployment waves by site, role-criticality and current app version, and sequence the waves so we never exceed [helpdesk capacity = X migrations/week]. Then generate the full rollout package: a phased plan in Excel (wave, site, headcount, milestones, owners, completion criteria), an all-staff announcement, an IT team deployment playbook, a helpdesk FAQ (top 20 questions), and a manager briefing"*

For Whom
IT Administrators

What it does
Reads your existing IT policies and past rollout communications, then generates the complete deployment package in one prompt

AUDIT AND SURFACE AGAINST A STANDARD

HEAVY FINANCE

Prompt: *"Audit every file in [this SharePoint folder] — contracts / configs / policies — against [our standard]. For each, extract the key terms, check them line by line, and categorize every violation by severity with the issue, the impact, and a specific recommended fix. Produce a sortable Excel report, one row per finding, plus a short exceptions' summary.*

For Whom
Finance and Compliance Managers

What it does
Reads dozens of documents at once, checks each against the standard in code, and outputs a sortable Excel of every violation with severity and recommended fix

Use-cases for ACM and BDMs

TURN A USAGE EXPORT INTO A CUSTOMER ADOPTION READOUT

HEAVY **ACM**

Prompt: *"Take [this usage export — the CSV/Excel from the customer's M365 admin center]. Compute the adoption metrics that matter: active vs licensed by team, month-over-month trend, top and bottom scenarios, and the teams that stalled or dropped. Flag every team below [X% active] and every negative trend. Produce a chart-driven Excel readout plus a one-page executive summary of where adoption is at risk and the three actions to fix it"*

For Whom

ACM leads

What it does

Computes real adoption statistics in code from the raw usage export — trends, at-risk teams, drop-offs — and returns a chart-driven Excel readout plus an exec summary

ONBOARD A WHOLE COHORT WITH A COMPLETE 30-60-90 PLAN

HEAVY **BDMs**

Prompt: *"For each of the [N new hires] in [this Excel] — name, role, start date, team — read what that role needs from [the team's SharePoint knowledge base] (charter, process docs, past wikis, last onboarding pack — dozens of files) plus [their job description]. Build a role-specific 30-60-90 plan, then generate a self-contained interactive HTML onboarding hub: a phase-by-phase checklist that tracks progress, a 'who to meet' map built from who actually authored each doc, and links back to every source. Save one hub per hire, named by person, in one folder. Finally, review my calendar and schedule the recurring check-ins with each new hire across their first month, plus a first-week intro call with each key stakeholder they need to meet — fitting everything around my existing availability."*

For Whom

BDMs

What it does

Ingests dozens of real team docs, produces one personalized interactive HTML hub per hire, and books the check-ins and stakeholder intro calls around your calendar — plans, artefacts and scheduling in a single run.

Estimate your pilot

Define the users
- Knowledge workers
- Executives
- Customer-facing knowledge workers
- Technical workers

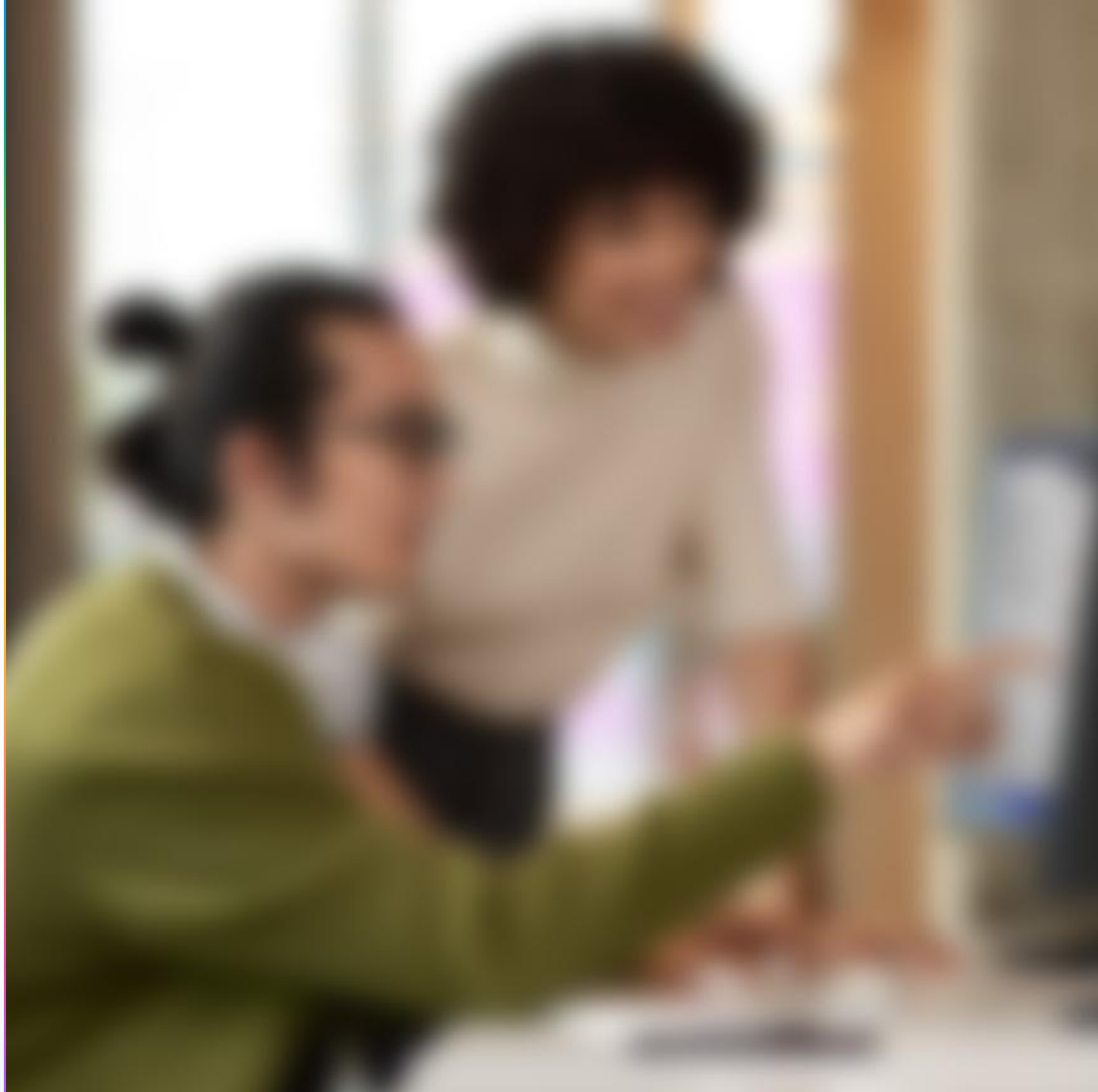
Estimate type of tasks
- Light
- Medium
- Heavy

Leverage calculator and track in consumption dashboard

https://aka.ms/CustomerCoworkEstimator

Cowork Skills

The layer that turns individual use cases into org-wide adoption

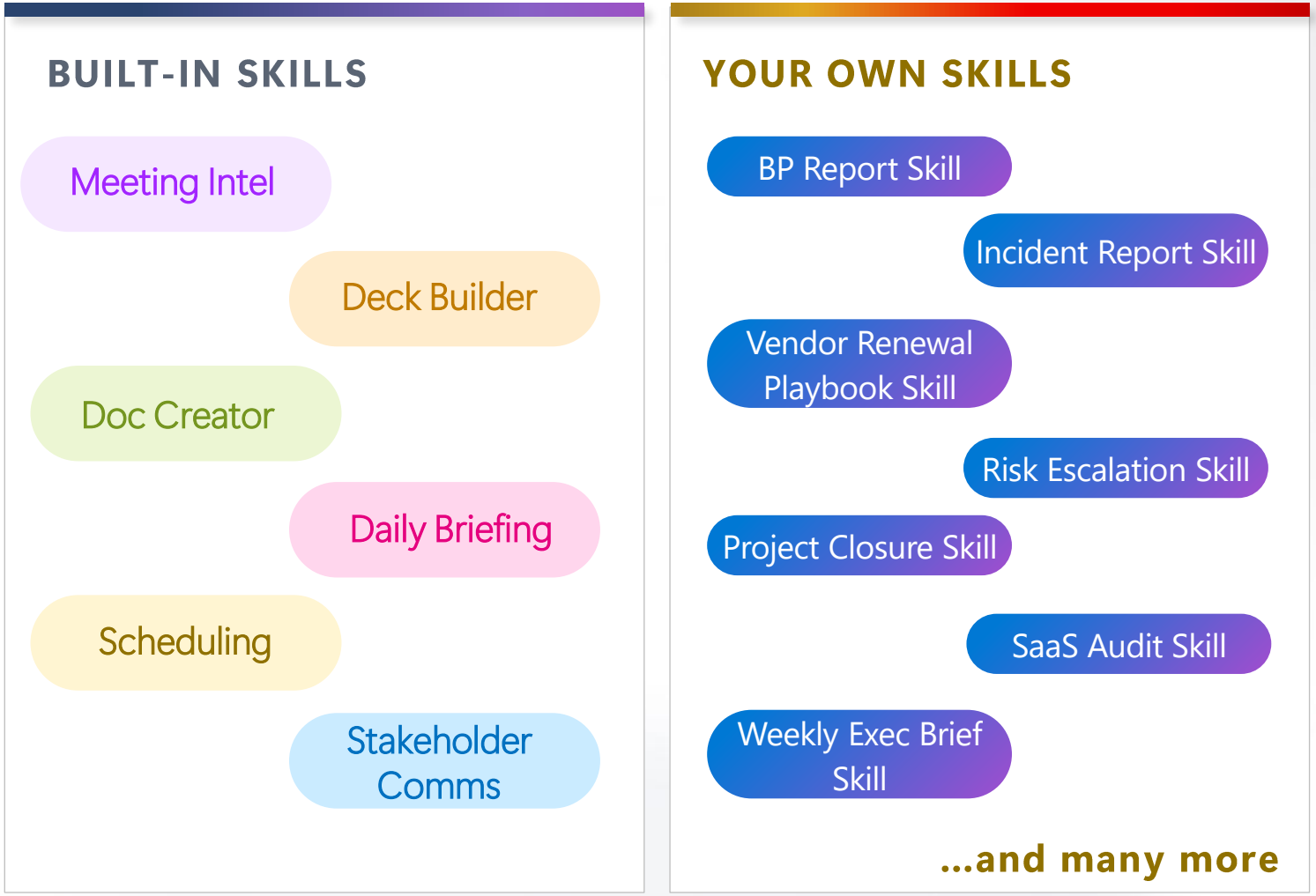


What is a Skill?

A Skill is a reusable recipe that teaches Cowork to run a whole workflow — saved instructions it follows again and again.

Built-in Skills work out of the box; your own capture your formats. Describe it once, share the file, and the team runs it with zero training.

It lives as a simple file in your OneDrive. Cowork triggers it from your wording, so one keyword runs every step.



Copilot Cowork

Out of the box specialized skills that knowledge works can immediately put to work

Word
Create and edit Word documents

Excel
Create and edit Excel spreadsheets

PowerPoint
Create and edit PowerPoint presentations.

PDF
Work with PDF documents

Email
Compose, reply, forward, and send emails. Save drafts and manage attachments

Calendar
Create events using natural language, add Teams meeting links, and manage your calendar

Meetings
Schedule meetings, prepare meeting, intelligence, and work insights

Daily briefing
Prepare your daily briefing.

Enterprise search
Search across your organization

Research
Conduct in-depth research across multiple sources to compile comprehensive answers and analysis on complex topics

Adaptive cards
Generate interactive card-based responses with structured layouts, buttons, and data displays in the conversation

Custom skills
Create a subfolder in OneDrive of custom skills that Cowork can reference at the start of each conversation.

Generally available
Currently excluded from the EU Data Boundary, and when applicable, in-country processing commitments [Anthropic as a subprocessor for Microsoft Online Services | Microsoft Learn]

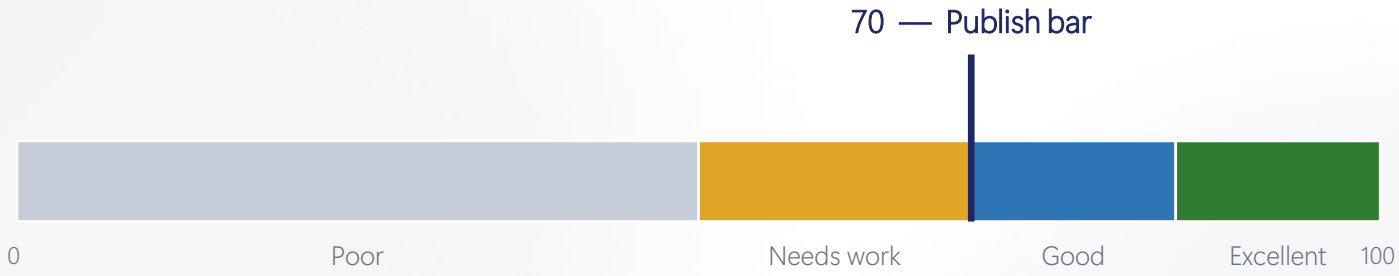
Features of a great skill

When you create a skill, Cowork automatically validates, scores, and safety-checks it

HOW A SKILL IS SCORED

4 dimensions × 25 pts = / 100

1. **Trigger clarity** /25
   Switches on at the right time
2. **Instruction specificity** /25
   Knows exactly what to do
3. **Scope boundaries** /25
   Stays in its lane
4. **Robustness** /25
   Handles surprises safely



THREE SEPARATE GATES

Publish bar (MVB ≥ 70)

A skill must clear 70/100 before it can be shared

Security / RAI scan

Flags risky actions — auto-send, delete, people-ranking

No-fabrication check

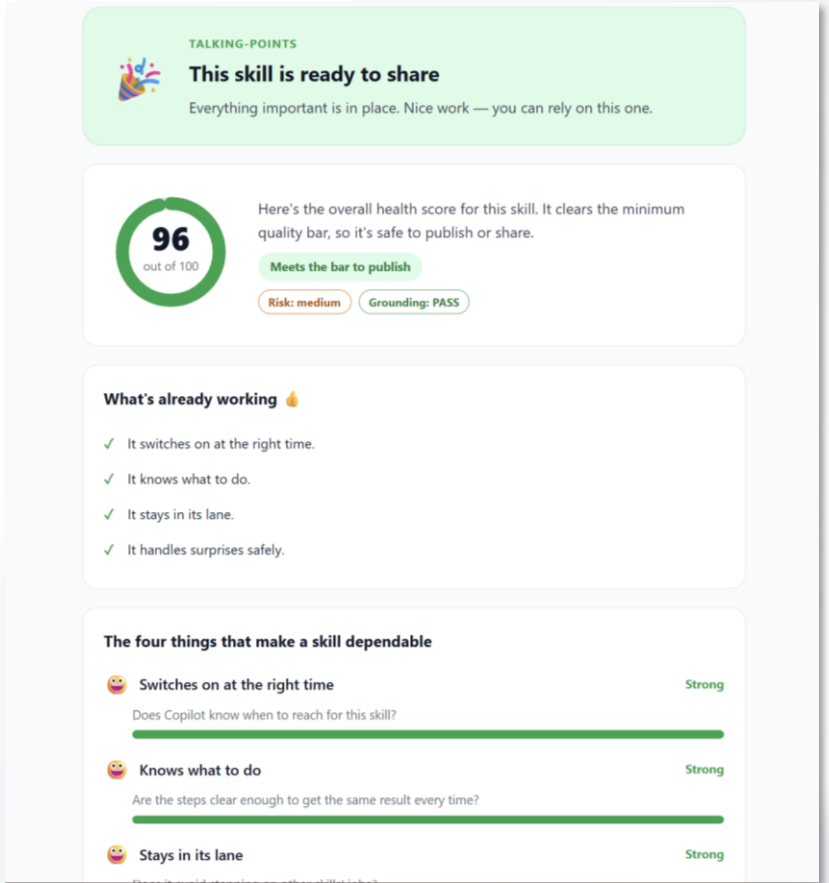
The skill must never invent facts, names, or numbers

Build your own – The Layer Scale



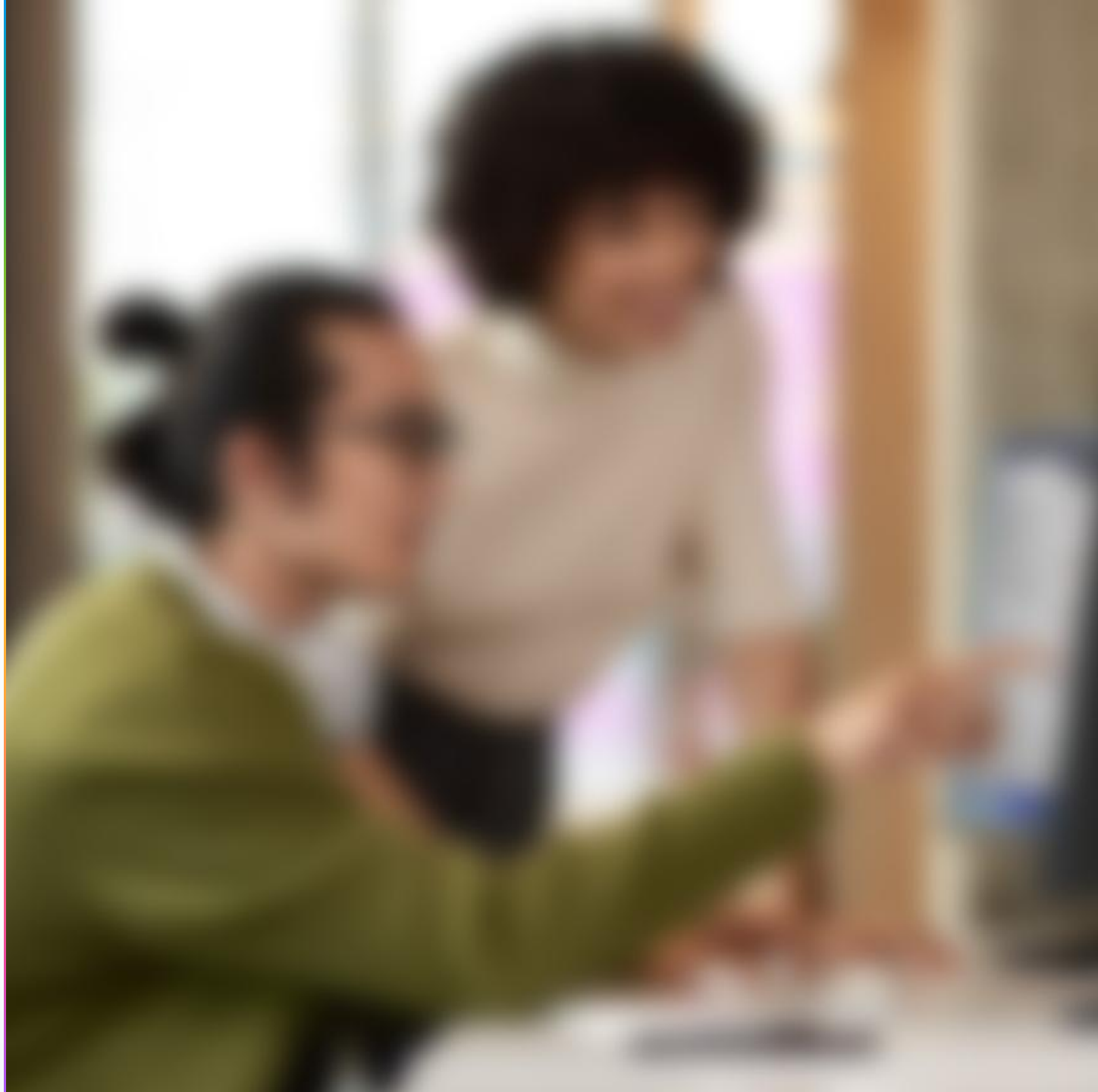
What it does

Turns any topic, document, or meeting into a tight, ready-to-speak set of talking points — a punchy hook, 3–5 key messages with supporting bullets, and a clear call to action — saved as a shareable file.



FinOps

Focusing on what matters the most
for your organization.
Not the easy ones.



AI FinOps: Central controls, team-level insights

Microsoft connects administrative guardrails with team-level consumption visibility.

CENTRAL IT

Cost Management

Microsoft 365 admin center

ESTABLISH THE GUARDRAILS

- Activate usage-based AI services and billing
- Set spending policies, limits, service access, and alerts
- Monitor consumption across the tenant, groups, users, and services

BUSINESS & TEAM LEADS

Consumption Dashboard

Insights

UNDERSTAND SPEND IN CONTEXT

- Track team usage, spend trends, and concentration
- Compare by organization, function, service, and policy
- Use evidence to inform allocation, enablement, and policy changes

SHARED AI FINOPS LOOP

SET GUARDRAILS → REVIEW USAGE + VALUE → ADJUST SPEND + POLICY

IT owns centralized governance; business leaders add the operating context for better-informed spend decisions.

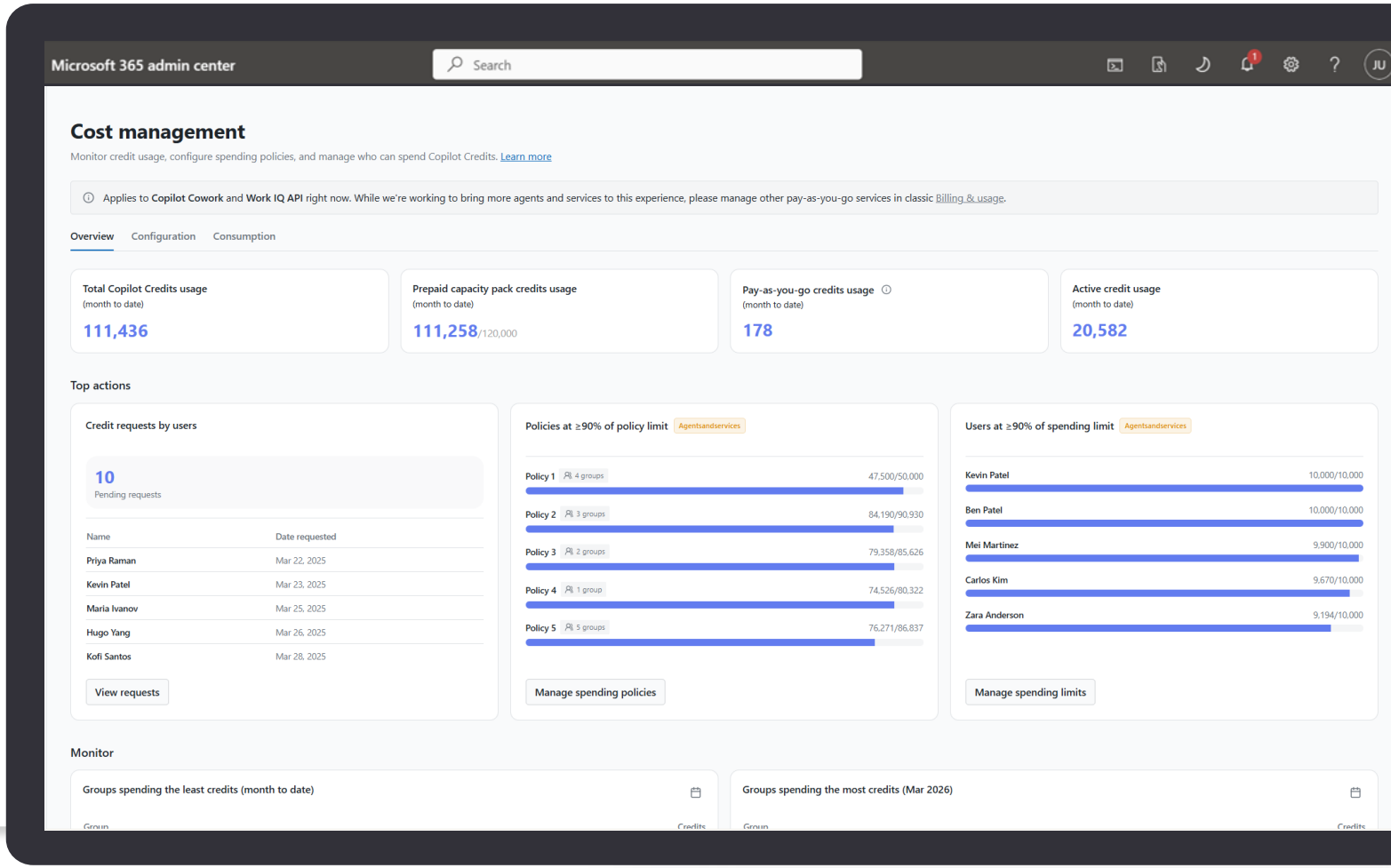
CENTRAL IT

Cost Management

Microsoft 365 admin center

Manage spend and unlock usage-based billing services from a centralized dashboard

- **Monitor:** Track Copilot Credit usage and runway, with reporting and spend trends
- **Control spend:** Select services, set limits and create spending policies at tenant, group, and user level
- **Optimize:** Inform policy adjustments and smarter budget allocation.



Product images subject to change

BUSINESS & TEAM LEADS

Consumption Dashboard

Insights

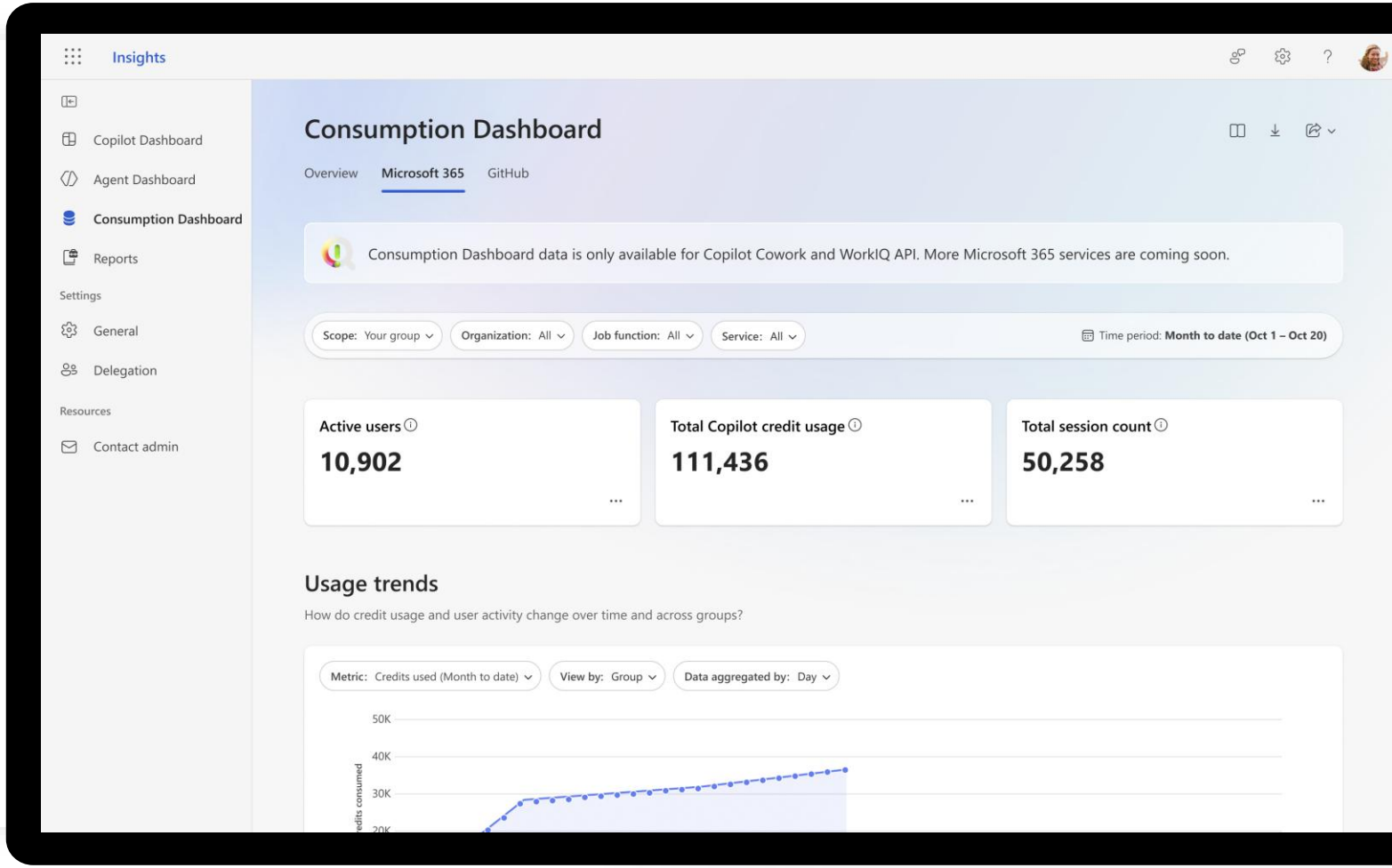
Empower team leads to understand usage-based AI spend across Microsoft services

Track credit usage, trends and distribution for your team by organization, job function, service, and policy

Understand how consumption changes over time and how usage is distributed

Measure the value of Cowork to optimize usage by impact and spend

Export data (programmatically or CSV) for offline analysis or create custom PBI reports



Product images subject to change

Consumption Dashboard – Cowork usage intensity and user level details

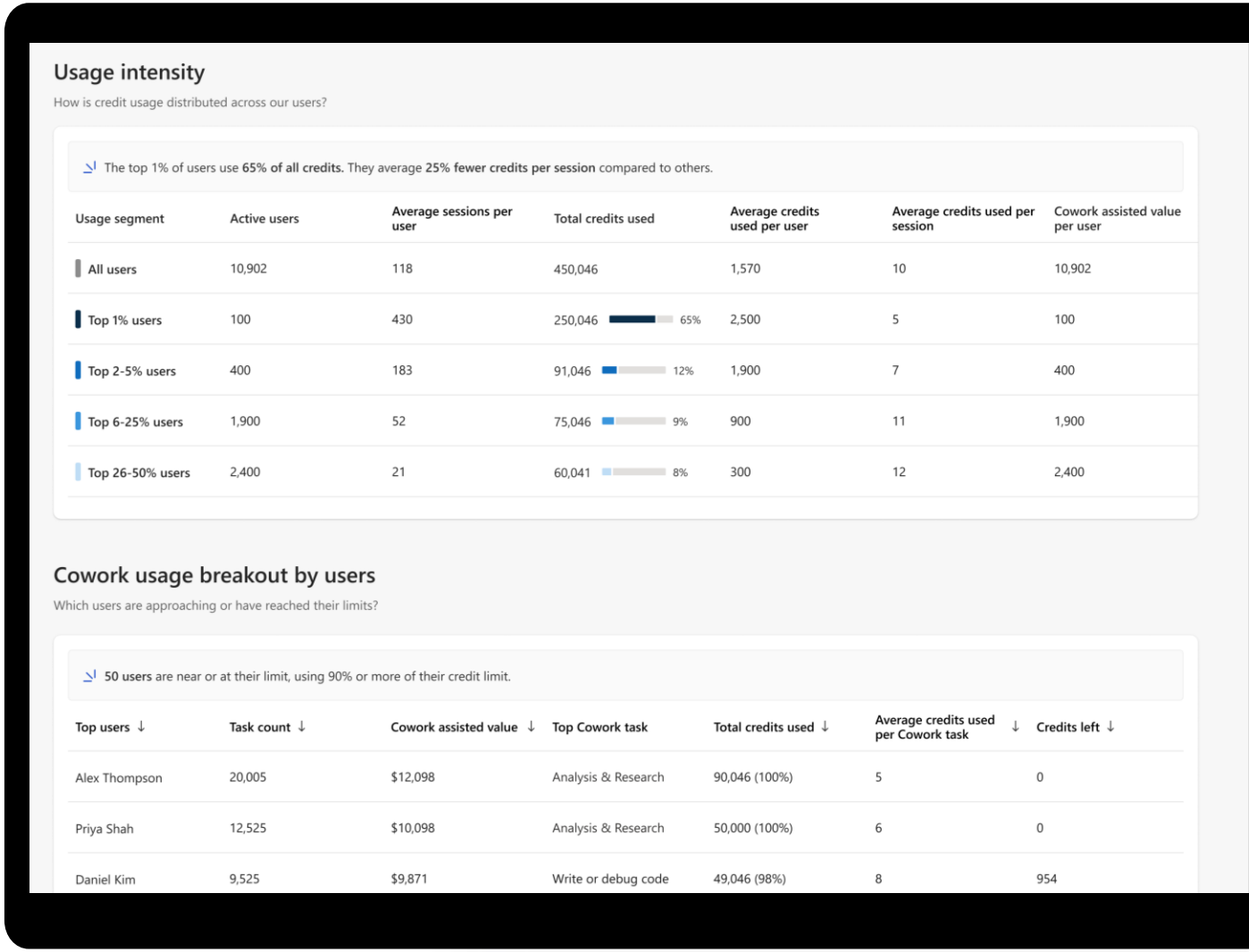
Identify your top users of Cowork to inform cost management

View Cowork usage by top 1%, 5%, 25% and 50% of users

Identify your power user groups that account for the most credit usage

See individual Cowork usage details against assisted value and credit to identify top users

Spot Cowork efficiency to inform enablement and cost management



Product images subject to change

Next steps

1. Identify your top 3 use-cases and related personas along with their KPIs
2. Learn more about Cost Management and Consumption Dashboard
3. Activate usage-based AI services in the Cost Management dashboard

Thank You.