

Crash course in Copilot Cowork

A practical guide to scaling delegated work with AI –
while keeping people in control.



Work is changing. So is the role of AI.

Most organisations have taken their first steps with AI – summarising meetings, drafting documents and finding information faster. But most work still doesn't move faster. It's fragmented across meetings, messages, documents and processes, so teams spend more time coordinating work than completing it.

For leaders, the next challenge isn't creating content faster – it's helping teams move work from idea to outcome, cutting the manual coordination between apps and accelerating follow-through, responsibly and at scale. That's where Microsoft 365 Copilot Cowork comes in: instead of writing a single prompt for a single response, you describe an outcome and Cowork builds a plan, gathers context, creates deliverables, coordinates next steps and returns work for your review before it acts.



The goal isn't to remove people from the process. It's to spend less time on coordination and execution, and more on the judgement, expertise and creativity that matter most.



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Meet Cowork

The agentic experience in Microsoft 365 Copilot

Cowork is the agentic experience in Microsoft 365 Copilot that helps people delegate multi-step business work while staying in control. Rather than a request-and-response tool, it gathers context, proposes a plan, creates outputs and pauses for review or approval before taking consequential actions.

Where Cowork fits in Microsoft 365 Copilot

Microsoft 365 Copilot is the AI for work – built into the apps you use every day and grounded in your work data.

Two experiences live within it:

- ➔ **Copilot's everyday assistance works in the moment.** In Copilot Chat and directly in Word, Excel, PowerPoint, Outlook and Teams, you can ask and answer, draft, summarise, brainstorm and create polished artefacts – usually through a single request and response.
- ➔ **Cowork is the agentic experience you delegate an outcome to.** It plans, takes the steps across your apps and pauses for your approval along the way.

Why this matters now

Not all work is created equal. Much is well served by in-the-moment assistance – a quick answer, a summary, a draft. But end-to-end, complex work still forces people to switch between apps and chase follow-ups. Cowork is built for that harder work – reducing coordination overhead so time goes to outcomes and accountability, not isolated tasks.

02

Why Microsoft is the partner for agentic work

Why Microsoft is the partner: three reasons

Since Cowork is part of Microsoft 365, it can work where business activity already happens – across documents, meetings, email, chats, calendars and projects while respecting existing permissions and governance.



Grounded in your work

Cowork draws from the information people already use to get work done – emails, meetings, files, chats, SharePoint sites and more – and, where connected, reasons over line-of-business data through connectors and plug-ins, pulling together context that would otherwise stay fragmented.



Integrates with your everyday apps

It coordinates tasks across Outlook, Teams, Word, Excel and PowerPoint, can keep working in the background, and saves outputs into OneDrive with your sensitivity labels applied.



Enterprise-grade trust by default

Cowork runs within Microsoft 365 security, compliance and governance boundaries – respecting identity and permissions, asking approval before consequential actions, supporting auditability and giving administrators control over access, usage and cost. Your content isn't used to train foundational models.

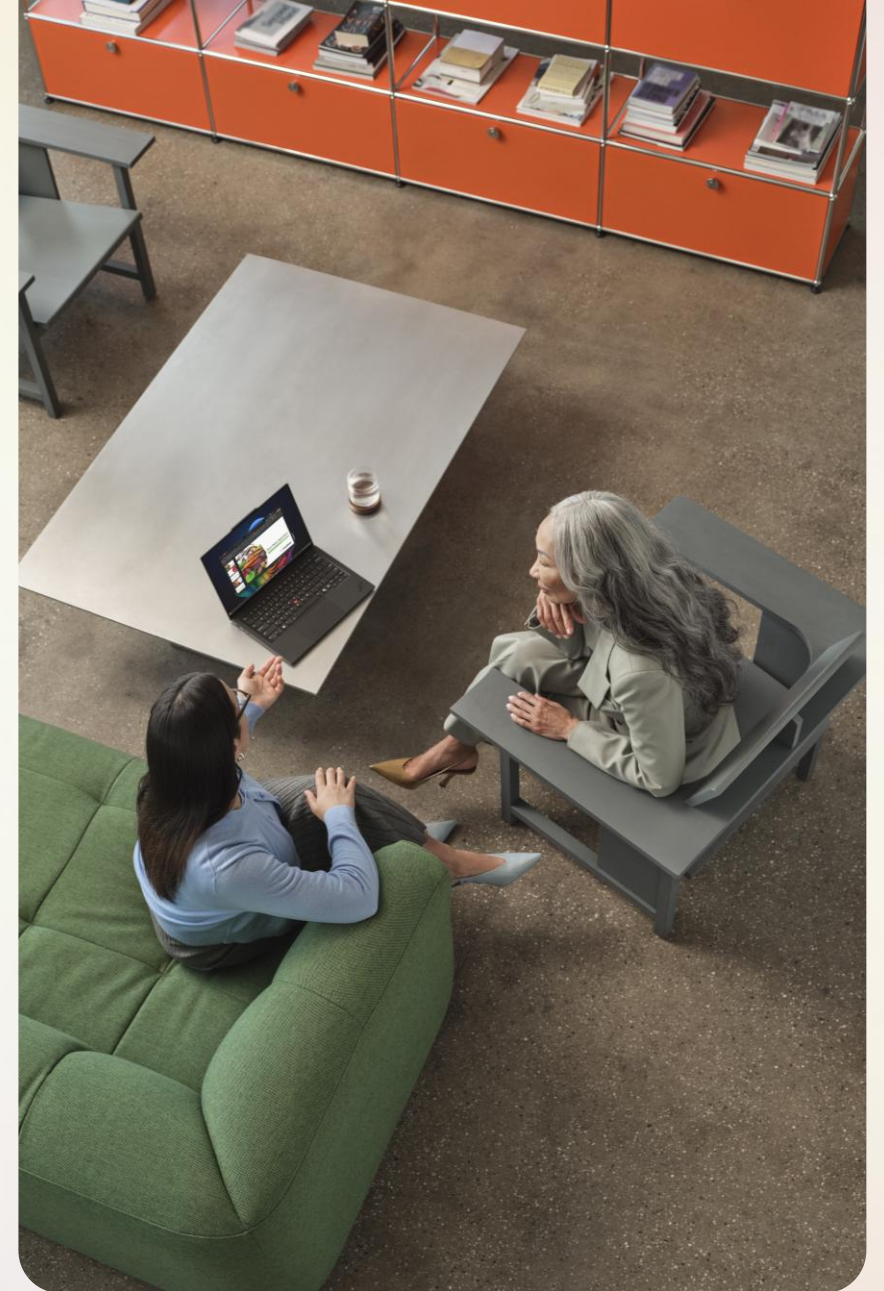
03

From prompts to outcomes

The key idea for leaders is the difference between AI assistance and AI-driven outcomes.

Assistance answers a question, writes a summary or drafts content – valuable and still essential. But many business activities need more than one interaction: planning, execution, review and follow-through.

That's the step Cowork is built for.



How Cowork works

Delegating work to AI requires visibility and control. Cowork follows a simple, repeatable process that keeps people in control from start to finish.

01

You describe the outcome.

State the goal and what 'done' looks like – not each step.

02

Cowork builds a plan.

It lays out the approach so you can see it before anything happens.

03

It coordinates work across the tools your business already uses.

From Microsoft 365 apps to connected systems like Dynamics 365 and Microsoft Fabric, and third-party tools via plug-ins, it works in the background while keeping you informed.

04

It checks in at the moments that matter.

Review, approve, pause or redirect – and it asks before any consequential action.

05

It delivers real outputs into Microsoft 365.

Documents, decks, emails, meeting content, trackers and other file types like images or HTML and webpage mock-ups – saved, labelled and auditable.

Knowing which to reach for

Reach for Copilot in the apps or Copilot Chat when...	Reach for Copilot Cowork when...
You need a quick answer, summary or brainstorm	You have a clearly defined outcome with several steps
You want help drafting or thinking in the moment	The work spans documents, meetings, email and people
You need a single artefact or a quick edit	The work produces multiple connected deliverables
Fast research on a single question will do	Research, creation and delivery need to come together
The task lives in a single conversation	The work needs review checkpoints from plan to finish

The rule of thumb: use Copilot in the apps for in-the-flow help on the artefact or activity you’re already doing; use Copilot Chat for conversational help to think, find, summarise, draft or explore; use Cowork to delegate outcomes across steps, apps and follow-through.

04

Put Cowork to work across
high-value workflows

Customer meeting preparation and follow-through

Preparing for customer engagements requires synthesising context from emails, meetings and account data – then turning it into insights, materials and next steps.

Delegate

“Prepare me for my customer meeting with [Customer]. Gather relevant emails, calendar context, account data and supporting documents. Identify customer priorities, risks and opportunity areas. Create a briefing document, build an analysis file with usage and sales trends and create a client-ready presentation. Draft a customer update email and an internal alignment summary. Show me everything first. Then schedule prep time, follow-up meetings and send communications after I approve.”

What Cowork does

- Pulls together account history, communications and meeting context into a unified view.
- Identifies priorities, risks and opportunities for the upcoming engagement.
- Produces multiple deliverables: a briefing document (Word), analysis with charts (Excel) and a presentation (PowerPoint).
- Drafts internal and external communications and prepares follow-up plans.
- Pauses for review before scheduling meetings or sending communications.



The shift

Teams move from fragmented prep to coordinated engagement workflows, freeing time to focus on customer conversations, relationship building and outcomes.

Strategic account planning and growth

Building a strategic account plan requires connecting that context, identifying growth opportunities and coordinating next steps across the account team. Cowork can help turn scattered information into a structured, action-ready account strategy.

Delegate

“Build a strategic account plan for [customer]. Review recent meetings, emails, Teams conversations, pipeline activity and relevant documents. Identify growth opportunities, stakeholder priorities, risks and recommended actions. Create an account plan document and a leadership review deck. Build an opportunity tracker with owners and timelines. Draft follow-up emails for key stakeholders. Show me the plan and actions first. Then schedule internal and customer follow-up meetings and update CRM records after I approve.”

What Cowork does

- Pulls together recent customer activity, relationship history, pipeline data and account materials.
- Synthesises insights into growth opportunities, stakeholder priorities, risks and next-best actions.
- Produces multiple deliverables: an account plan (Word), a leadership presentation (PowerPoint) and a tracked opportunity plan (Excel).
- Drafts stakeholder communications and prepares follow-up actions across the account team.
- Pauses for review before sending communications, scheduling meetings or updating systems.



The shift

Sales teams spend less time gathering and organising context, and more time strengthening relationships, advancing opportunities and driving account growth with clear ownership and follow-through.

Executive business review and decision preparation

Preparing a board-ready QBR or executive readout requires synthesis, coordination and follow-through – not just a summary. Cowork can help turn fragmented updates into a complete decision-ready workflow.

Delegate

“Prepare a board-ready QBR for [initiative/business area]. Gather updates from emails, meetings, Teams discussions, documents and reporting systems. Identify key results, risks, decisions, milestones and dependencies. Create an executive summary and supporting presentation. Build a KPI tracker with trends and projections. Draft briefing notes and a post-meeting recap email. Show me the materials first. Then schedule the leadership review and circulate the content after I approve.”

What Cowork does

- Connects insights across meetings, messages, files and performance data.
- Identifies key results, risks, decisions and dependencies shaping the business.
- Produces multiple deliverables: an executive summary (Word), a presentation (PowerPoint) and a KPI tracker (Excel).
- Prepares briefing notes and stakeholder communications before and after the meeting.
- Pauses for review before scheduling meetings or distributing materials.



The shift

Leaders spend less time reconstructing updates and more time pressure-testing recommendations, aligning stakeholders and making decisions with confidence.

Financial variance analysis and forecasting

Finance teams reconcile data across ERP systems, emails, meetings and reports to understand performance, identify drivers and communicate updates. Cowork can help turn it into a complete financial workflow with outputs and follow-through.

Delegate

“Create a variance and forecast update for [period]. Pull actuals and commitments from financial systems and analysis files. Gather context from emails, Teams and meetings. Identify top drivers of variance and forward-looking risks. Create an updated forecast model, a variance presentation and a formal report. Draft an executive summary email. Show me everything first. Then schedule a finance review meeting and share materials after I approve.”

What Cowork does

- Combines financial data with communication context to explain performance drivers.
- Identifies risks, impacts and forward-looking projections.
- Produces multiple deliverables: a forecast model (Excel), a presentation (PowerPoint) and a formal report (Word).
- Drafts executive communications and prepares the review workflow.
- Pauses for review before distributing outputs or scheduling meetings.



The shift

Finance teams spend less time reconciling inputs and assembling reports, and more time guiding decisions, communicating insights and driving business outcomes.

Legal contract review and redlining

Legal and compliance teams manage contracts across emails, shared documents, templates, prior agreements and regulatory requirements. Cowork can help turn that process into a structured, review-ready workflow.

Delegate

“Redline this customer contract against our standard MSA. Segment the contract into clauses and compare each against our approved positions for [region]. Verify any cited regulations against official sources. Identify risks, missing terms and required changes. Show me a risk summary first. Then create a redlined Word document with tracked changes, an audit workbook detailing clause-level differences and risk flags and a draft cover note I can send to legal stakeholders.”

What Cowork does

- Breaks the contract into clauses and compares each against standard terms and policies.
- Validates regulatory references using approved or official sources.
- Identifies risks, gaps and required changes across the agreement.
- Produces multiple deliverables: a redlined contract (Word), a structured audit workbook (Excel) and a stakeholder-ready cover note.
- Pauses for review before finalising outputs or sharing with stakeholders, keeping a person in control of decisions and approvals.



The shift

Legal teams spend less time manually reviewing clauses and assembling review packages, and more time evaluating risk, guiding decisions and working with stakeholders on final outcomes.

05

Develop effective habits
for working with Cowork

Six habits for working with Cowork

The most productive users learn to think differently: instead of asking for individual outputs, they delegate outcomes. A few habits go a long way.

01

Start with the outcome

Define what success looks like before you begin – the clearer the goal, the better Cowork organises the work around it.

02

Provide relevant context

Strong outcomes depend on strong context – point Cowork to the project, audience, supporting materials and constraints: the meetings, files, notes and goals that ground the work.

03

Connect your sources of data

The more relevant context Cowork can reach, the better it reasons – so connect the files and sites it needs and extend to line-of-business systems through connectors and plug-ins where available.

04

Review the plan

Delegation is not disengagement. Check that the priorities, assumptions and deliverables match your expectations before work progresses. Human judgement remains essential.

05

Guide the process

The best delegation is interactive: give feedback, refine direction, adjust priorities, add context as it goes.

06

Build repeatable habits – and reusable Skills

Look for work that recurs; those patterns build confidence, and the strongest can be built and deployed as reusable Skills your team shares and runs again and again.

Anatomy of a strong delegation

Outcome + context + specifics (timing, outputs, actions, audience and review).

Prepare a board-ready quarterly business review by Friday for the leadership team. Gather updates from emails, meetings, Teams discussions, documents and reporting systems for this initiative.

Identify key business results, risks, decisions, dependencies and upcoming milestones.



An executive summary (Word)



A supporting presentation deck (PowerPoint)

Create



A KPI tracker with trends and projections (Excel)



A follow-up action plan with owners and timelines

Draft briefing notes and a post-meeting recap email for stakeholders.

Show me the full plan and outputs for review first.
After approval, schedule the leadership review meeting, share materials and send follow-up communications.

06

Get your organisation
ready for Cowork

Readiness checklist for Cowork

You don't need a transformation programme to start. Approach Cowork with the same intentionality you'd apply to any new way of working – and begin with a focused pilot.



Start small and build confidence

Begin with workflows that are repeatable, understandable and easy to review – especially high-value activities that are important today, but still highly manual.



Identify strong early adopters

Choose people willing to experiment, share feedback and model effective practices; pilot groups surface patterns you can replicate.



Establish clear usage guidance

Help teams know when everyday Copilot assistance fits, when Cowork fits and when a human-only process remains best. Simple decision frameworks accelerate adoption.



Reinforce accountability and responsible use

Set expectations for review, approvals, data handling and judgement. The objective isn't to remove human responsibility – it's to focus people's expertise where it creates the most value.



Measure learning alongside adoption

Watch repeat usage, workflow expansion and qualitative feedback. Organisations that focus on learning and iteration build stronger foundations for the long term.

07

Trust and governance for IT leaders

Trust model readiness checklist



Cowork inherits the Microsoft 365 trust model, which keeps the readiness checklist familiar.

As you pilot, confirm how it honours identity and permissions, applies sensitivity labels to the work it creates, surfaces actions for audit and respects the access, governance and cost controls you've already established across your organisation.

Because people approve consequential actions and outputs land in your governed environment, you can extend delegated AI work without stepping outside the boundaries you already manage.



The next step in AI-powered work



The first wave helped people work *faster*.

The next wave helps people work *differently*.



Practical step toward a future

People can delegate meaningful business work while remaining accountable for outcomes – moving beyond isolated prompts to engage across planning, coordination, execution and follow-through.



For leaders, the opportunity is not simply adopting another AI capability

It's helping teams tackle complex, multi-step work more effectively: bringing together information, coordinating activities and producing outcomes that would otherwise require significant manual effort.



Organisations that build delegation habits now will be better positioned for the shift toward agentic work

Microsoft 365 Copilot Cowork provides a practical starting point: helping people delegate meaningful work, stay in control and focus their time on the decisions, expertise and judgement that drive business outcomes.

Take the next step



Copilot Cowork: Automate Tasks and Workflows

Learn how organisations are applying Microsoft 365 Copilot Cowork to coordinate complex work, accelerate execution, and help teams move from ideas to outcomes while staying in control.