

Copilot Cowork: Building AI workflows in Microsoft 365

Learn what Copilot Cowork is, how it differs from regular Copilot Chat, and build your first multi-step workflow in under 5 minutes.

Your work is now automated.

You have seven meetings this week, two status reports to submit, an inbox full of 200 emails, and a quarterly presentation to complete by Friday. You know what to do for each task – the issue isn't skill, it's time.

Copilot Cowork changes that. Instead of asking the AI one question at a time, you simply describe the desired outcome – 'help me prepare for tomorrow's board meeting' or 'build this week's status report from my Teams and Planner conversations' – and Cowork turns it into a multi-step plan that runs across Outlook, Teams, Excel, PowerPoint, and SharePoint. It works in the background, checking your input as needed and delivering the complete result for you to review, edit, and send.

This course teaches you how to build real workflows, not just fun demos.

Upon completing this course, you will be able to:

1. Develop an automated meeting preparation process to retrieve documents, summarize content, and draft meeting agendas.
2. Generate weekly status reports from distributed data across Teams, email, and Planner.
3. Organize your inbox by intelligently categorizing and crafting responses ready for review.
4. Create workflows to transform data into presentations, analyze Excel data, and export complete PowerPoint slides.
5. Track projects across Teams, Planner, and SharePoint in a coordinated workflow.
6. Connect to and troubleshoot workflows that handle real-world exceptions.

What you will learn

1. Explain how Copilot Cowork implements multi-step workflows across Microsoft 365 applications .
2. Develop automated meeting preparation processes that retrieve data from emails, files, and calendars.
3. Generate recurring status reports that aggregate data from Teams, email, and Planner.
4. Design processes for categorizing, prioritizing, and drafting responses to emails.

5. Implement data analysis processes to transfer insights from Excel to PowerPoint presentations.
6. Evaluate the workflow output at checkpoints and refine the prompts for better results.

After completing this course, you will be able to:

1. Build an automated meeting preparation process, collecting old emails, files, and notes into a summary document, draft meeting agenda, and block calendar entries.
2. Generate recurring status reports that aggregate data from Teams channels, email threads, and Planner tables without manual compilation.
3. Designing email categorization, prioritization, and response drafting processes – handling over 200 emails per day without becoming overwhelmed.
4. Position yourself as a workflow automation expert on your resume, a highly sought-after skill as businesses adopt AI agents .
5. Transform data pipelines into presentations, converting Excel analytics directly into presentation-ready PowerPoint slides in minutes.

What you will build

Multi-application project tracking tool

The Copilot Cowork workflow monitors key milestones across Teams, Planner, and SharePoint, automatically flags risks, and creates a consolidated weekly tracking tool for stakeholders.

Automated summary generator for leaders

The multi-step workflow design gathers updates from email, Teams, and calendars, compiles key decisions and obstacles, and provides a complete summary to leadership every Monday morning.

Capabilities for building workflows with Copilot Cowork

Demonstrate that you can design, test, and deploy multi-step AI workflows on Microsoft 365 using Copilot Cowork.

Prerequisites

1. The Microsoft 365 Copilot license is working with Frontier access.
2. Familiar with Outlook, Teams, Excel, and PowerPoint

Suitable candidates

1. Employees are overwhelmed with meetings, emails, and status updates.
2. Project managers track work across multiple Microsoft 365 tools.
3. The team leader spends hours compiling reports from various sources.

4. Operations professionals want to automate repetitive workflows between applications.
5. Anyone with a Microsoft 365 Copilot license who wants Copilot to do real work, not just answer questions.

Welcome to Copilot Copilot

Learn what Copilot Copilot is, how it differs from regular Copilot Chat, and build your first multi-step workflow in under 5 minutes.

What would happen if your computer did tedious tasks while you were doing your actual work?

Currently, getting help from AI at work looks like this: Open Copilot, type a prompt, get a response, copy it somewhere, then type another prompt for the next step. It's certainly helpful, but you're still in control of the actions.

Copilot Copilot completely reverses that model. Launched in March 2026 as part of Microsoft 365 Copilot Wave 3, Copilot lets you describe an outcome—not a single task, but an outcome—and then it builds a plan, executes the steps across M365 applications, and communicates with you at critical times.

By the end of this lesson, you will understand how Copilot works and have your first real workflow running.

Things you will learn

In this course, you will build 6 complete automated workflows:

1. Prepare for the meeting by gathering documents, emails, and notes into a summary package.
2. The weekly status report is automatically compiled from Teams, email, and Planner.
3. Categorize emails, prioritize them, and draft responses.
4. The process of converting data into a PowerPoint presentation, transforming Excel analysis into a PowerPoint presentation.
5. Track the project across Teams, Planner, and SharePoint.
6. Custom workflows designed by you for your specific tasks.

Each lesson is hands-on. You'll build the workflow alongside the lesson, so you'll have a real, working product.

How Copilot Actually Works (60-Second Version)

Imagine a typical Copilot as an intelligent assistant that only answers one question at a time. Imagine Copilot as a colleague to whom you can delegate projects.

Here's the procedure:

1. You describe the desired outcome as: "Prepare for my client meeting with Acme Corp tomorrow."
2. Copilot builds the plan: It identifies what needs to be done - retrieves recent emails from Acme, finds the latest proposal draft, summarizes the most recent Teams call, creates a summary document.
3. It executes in the background: Powered by Work IQ (Microsoft's intelligence layer that reads signals across your M365 applications), Copilot begins fetching data and generating results.

4. Checkpoints give you control: At critical steps, Cowork will show what it has done and request approval before applying changes. You can adjust, redirect, or pause at any time.
5. You get the complete result: A summary document in Word, a preparation block on your calendar, a presentation if you need one - ready to review.

The entire process operates within your existing Microsoft 365 security and governance framework. Same identity, same authority, same compliance policies. Your IT team can audit every action.

? **Quick Check** : What are the 5 steps in the Cowork workflow?

Suggestions : Description, planning, execution, checkpoint, handover.

Your first workflow: Resolving calendar conflicts

Let's put this into practice. Open Copilot Chat in Microsoft 365 (via microsoft365.com or the sidebar of any M365 app) and try this prompt:

Xem l?i l?ch c?a t?i cho tu?n t?i. X?c ??nh b?t k? xung ??t l? ch tr?nh n?o h?c c?c cu?c h?p li?n ti?p kh?ng c? th?i gian ngh?. ??nh d? u b?t k? cu?c h?p n?o c? v? ?u ti?n th?p d?a tr?n ch? ?? v? danh s?ch ng?? i tham d?. ?? xu?t m?t l?ch tr?nh s?a ??i b?o v? ?t nh?t hai kh?i t? p trung 30 ph?t m?i ng?y.

What happened:

Cowork reviews your Outlook calendar, identifies conflicts, and provides a suggested revised schedule. It won't implement changes without your approval—it only displays the suggested schedule and awaits your consent.

Compare the time before/after:

1. Manual method: 20-30 minutes to review the schedule, check priorities, and email everyone to reschedule.
2. Cowork: It takes about 2 minutes to create the plan, followed by your approval.

Things to check:

1. Has it correctly identified the conflicts?
2. Are "low priority" flags reasonable?
3. Does the revised itinerary actually include time slots dedicated to the places you need to visit?

If something goes wrong, let Cowork know. Say something like, "The 3 PM meeting is actually a high priority – keep it as is. But move the team briefing meeting to the morning." They'll adjust the schedule and ask again.

Key points to note

1. Copilot Cowork implements multi-step plans across M365 applications, rather than responding to a single step.
2. Work IQ provides context for Cowork from your email, meetings, files, and collaboration models.
3. Each workflow has checkpoints for you to review and approve before implementing any changes.

4. You describe the results using natural language – no programming, no configuration menus.
5. It works within your existing M365 security and compliance framework.

Try it now: Your first collaborative workflow

Open Microsoft Copilot Cowork (in M365) or regular Copilot :

óng vai trò là Copilot Cowork agent c?a tôi. Thi?t k? m?t workflow nhi?u b??c trên các ?ng d?ng M365 cho m?t tác v? tôi th?c hi?n l?p ?i l?p l?i. V? nhi?m v?: - Nhi?m v? l?p ?i l?p l?i tôi mu?n t? ??ng hóa (mô t? toàn b? quy trình): [] - Các ?ng d?ng liên quan (Outlook / Teams / Word / Excel / SharePoint / OneDrive): [] - Các ?n d? li?u b?n c?n ??c: [] - K?t qu? mong mu?n (email nháp / tài li?u / ch?n l?ch / tóm t?t): [] - T?n su?t (m?t l?n / hàng ngày / hàng tu?n): [] - Các bên liên quan s? xem k?t qu?: [] C?n chu?n b? TR??C KHI th?c hi?n b?t k? ?i?u gì: 1. K? HO?CH QUY TRÌNH CÔNG VI?C v?i các b??c ???c ? ánh s? + ?ng d?ng M365 nào th?c hi?n t?ng b??c 2. D? LI?U C?N ?? C (email / file / cu?c h?p / SharePoint) 3. D? LI?U C?N GHI / T? O (email / file / l?ch) 4. CÁC CHECKPOINT ?? tôi xem xét (phê duy?t tr??c khi g?i / phê duy?t tr??c khi l?u) 5. 3 CH? ?? L?I + k? ho?ch kh?c ph?c cho m?i ch? ?? 6. KI?M TRA TUÂN TH? / B?O M?T – vi?c này có tôn tr?ng ranh gi?i d? li?u c?a t? ch?c tôi không? 7. Ch? s? KPI ?? theo dõi xem vi?c t? ??ng hóa này có ?áng ?? duy trì hay không QUY T?C B? T BU?C: - D?NG l?i tr??c khi g?i b?t k? thông tin nào ra bên ngoài (email/tin nh?n Teams cho ng??i ngoài t? ch?c c?a tôi) - yêu c?u phê duy?t. - Tôn tr?ng nhân b?o m?t - không bao gi? h? c? p m?c ?? b?o m?t. - Gi? t?t c? các hành ??ng trong tài kho?n M365 c?a tôi - không bao gi? ??y d? li?u sang các công c? bên ngoài. - N?u d? li?u Work IQ ?ã l?i th?i, hãy cho tôi bi?t ngu?n nào c?n c?p nh?t. - Ch? t?o b?n nháp cho n?i dung dành cho khách hàng - tôi s? xem l?i n?i dung tr??c khi g?i.

What you will see : A Cowork workflow with review checkpoints before making any changes to M365.

1. Question 1:

At what points in the workflow does Copilot Cowork require your intervention?

1. A. Only at the very last stage when everything is finished - this is a common belief but not sound when considered more closely.
2. B. At clearly marked checkpoints, where it shows progress, flag issues and require prior approval before implementing changes.
3. C. It never requires intervention - everything is completely automatic.

EXPLAIN:

Cowork runs in the background but displays checkpoints where you can review progress, provide clarification, approve or reject proposed actions, and adjust the plan. You're always in control.

2. Question 2:

What is Work IQ in the context of Copilot Cowork?

1. A. Microsoft's intelligence layer collects signals from M365 applications to provide Cowork with context about your work.
2. B. A score that measures your productivity level - a common misconception that overlooks how it actually works.
3. C. A premium add-on that incurs an additional fee.

EXPLAIN:

Work IQ is Microsoft's intelligence layer that gathers signals from Outlook, Teams, Excel, and other M365 applications. It provides Cowork with the same contextual understanding that you bring to your work—your meetings, emails, files, and collaboration patterns.

3. Question 3:

What makes Copilot Cowork fundamentally different from regular Microsoft 365 Copilot Chat?

1. A. It uses a different AI model.
2. B. It executes multi-step plans across multiple applications in the background, rather than just responding once.
3. C. It only works in Excel and PowerPoint - this would be great if it were true, but the evidence suggests a more complicated story.
4. D. It requires programming skills to operate.

EXPLAIN:

The standard Copilot Chat feature processes one request at a time. Cowork transforms your request into a multi-step plan that runs in Outlook, Teams, Excel, and other M365 applications in the background, checking at critical points for your approval.

Submit your work

Training results

You have completed **0** questions.

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