

AI tools guide for customers

Use the right AI assistant for the job



Start with the simplest tool that safely meets the need.
Choose a specialist tool only when the task, data or workflow calls for it.

Microsoft 365 Copilot

For licensed Microsoft 365 users in Word, Excel, PowerPoint, Teams, Outlook and more.

Best fit:
Everyday productivity in your Microsoft 365 apps.

Your everyday AI assistant in the flow of work

- Ask questions and get help**
Grounded in the Microsoft 365 content and context you already have permission to access.
- Create and edit content**
Draft emails, documents, spreadsheets, presentations, meeting notes and summaries.
- Find insights quickly**
Turn meetings, chats, files and inbox noise into useful next steps and ideas.
- Run meetings, chats, files and inbox**
Turn meetings, chats, files and inbox noise into useful next steps and ideas.

When to use Microsoft 365 Copilot

- You need answers from your Microsoft 365 data
- You are writing, editing or summarising work content
- You can achieve the outcome in a short, interactive session

Use when:

- Need work-context answers
- Creating or editing content
- Summaries and follow-ups
- One-session tasks

Copilot Cowork

For organisations using Microsoft AI agent capabilities.

Best fit:
Long-running task hand-off and repeatable agent-style work.

For complex, multi-step work

- Longer-running tasks**
Useful when a task needs several steps, files, tools or checks before the output is ready.
- Repeatable workflows**
Good for regular reports, structured research, process support or multi-output work.
- Business data and connectors**
Use approved connectors, actions and data sources so outputs reflect your business context. Connectors for Dataverse (DevOps in coming months).

When to use agents for Cowork

- The task is too long or layered for a normal chat
- You need multiple outputs or a repeatable process
- The work needs connected systems, actions or governance

Use when:

- Long-running task
- Multiple steps or outputs
- Repeatable workflow
- Connected business systems

GitHub Copilot

For developers, consultants and technical teams working with code, APIs, integrations, DevOps pipelines or solution extensions.

Best fit:
Development, integration and technical problem solving.

Your AI pair programmer and automation enabler

- Development and proof of concepts**
Write, understand, refactor, test and improve code faster.
- Workflows and automation**
Help build integrations, scripts, extensions and repeatable technical tasks.
- Connect to developer tools**
Work across IDEs, GitHub, command line workflows, repositories and MCP-enabled tools.

When to use GitHub Copilot

- You are building or extending software
- You need code suggestions, explanations or refactoring
- You are working with APIs, MCP servers, repositories or DevOps

Use when:

- Coding work
- Technical POCs
- APIs and integrations
- DevOps workflows

ChatGPT

For broad, flexible AI assistance.
Use an approved business or enterprise workspace for company, customer or sensitive data.

Best fit:
General purpose thinking, drafting, research and analysis.

A flexible assistant for open-ended work

- Brainstorm and shape ideas**
Explore options, campaign angles, customer messaging, explanations, outlines and first drafts.
- Analyse and structure information**
Summarise documents, compare approaches, build tables, interrogate datasets and turn messy input into clearer output.
- Use broader model capabilities**
Useful when you want a second perspective, multimodal support or a tool outside Microsoft 365.

When to use ChatGPT

- You do not need Microsoft 365 work-context grounding
- You want broad exploration, reasoning or drafting support
- Your organisation has approved how the data can be used

Use when:

- Brainstorming and drafts
- Research and analysis
- Second perspective
- Use approved data only

Claude

For specialist writing synthesis or agentic document work where your organisation has approved access and data handling.

Best fit:
Specialist reasoning and large-document work.

Use for specialist tasks that need another model style

- Long-form reasoning and synthesis**
Help with long documents, careful summarisation, structured comparisons and complex written outputs.
- Specialised tools and skills**
Use when a Claude-specific skill, connector or workflow is the best fit.
- Approval required**
Only use with company or customer data where your organisation has approved the workspace, connector and data handling.

When to consider Claude

- You need specialist writing, synthesis or long-context review
- A Claude-specific feature or connector is required
- Other approved tools cannot achieve the outcome as well

Use when:

- Large-document review
- Specialist connectors
- Long-form synthesis
- Approval needed

Which tool should I use?

Protect data
Never share customer, personal or confidential information outside the tool and workspace approved.

Check accuracy
AI outputs can be wrong. Verify facts, calculations and legal or technical claims.

Follow policy
Always follow your organisation's AI, seonignitors, APIs, security and technical POCs.

Keep a human in the loop
You are accountable for reviewing and approving any output you use.

Give feedback
Share useful use cases, risks and improvements with your AI or governance lead.