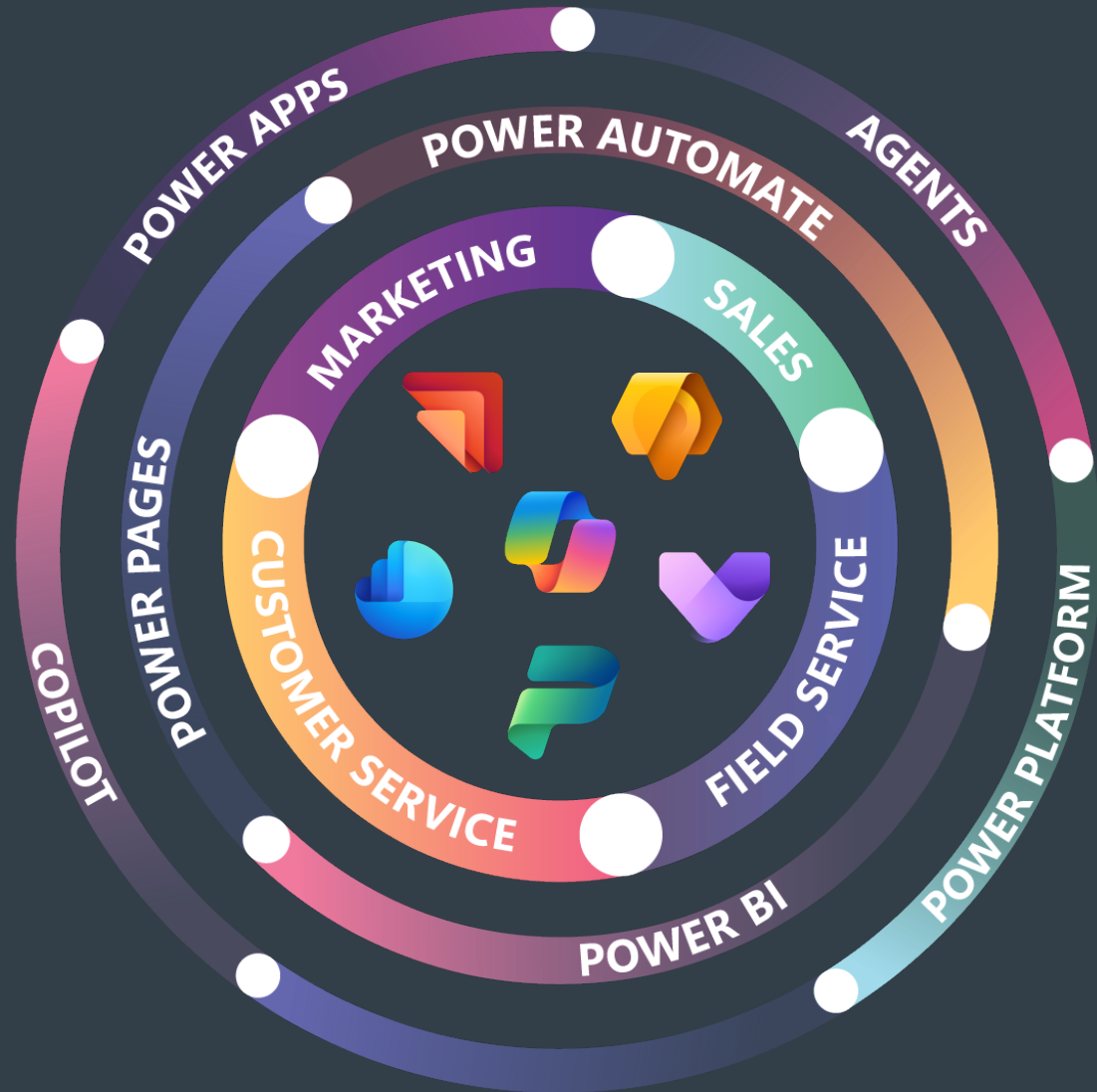


# CRM connect

Copilot Cowork



# What is Copilot Cowork?

## Your AI teammate. Not just a chatbot.

Copilot Cowork is a multi-tool, multi-step assistant that connects directly to your Microsoft 365 world — email, Teams, calendar, SharePoint, OneDrive, and beyond.

It doesn't just answer — it plans, takes action across apps, builds files, and follows tasks through to completion while you get on with the rest of your day.

*Think of Copilot Chat as the conversation. Cowork is the colleague who actually does the work.*



# Copilot Chat vs Copilot Cowork

## Copilot Chat

- Answers questions and drafts content one prompt at a time
- Lives in the chat window — you copy and paste into apps yourself
- Doesn't take actions in Outlook, Teams or your files on its own
- One conversation at a time — no scheduled or background work
- Best for quick questions, summaries and short drafts

## Copilot Cowork

- Plans and executes multi-step work across email, Teams, calendar, SharePoint and OneDrive
- Actually does the work — sends emails, books meetings, creates files
- Builds Word docs, Excel models, PowerPoints and PDFs as finished deliverables
- Runs in the background and can be scheduled to repeat daily or weekly
- Best for tasks that span apps, take real effort or need a finished output

# Where SMEs Win with Cowork

## Sales & Marketing

- Daily pipeline briefing from Outlook, Teams and your CRM
- Draft tailored prospect emails and follow-ups from notes
- Turn meeting transcripts into recap emails and action lists
- Build pitch decks and one-pagers from your own content

## Operations & Finance

- Weekly status reports pulled from email, Teams and SharePoint
- Chase overdue invoices and log responses against accounts
- Consolidate spreadsheets and build month-end summary packs
- Schedule and prep recurring leadership reviews

## Customer Service

- Triage the shared inbox and draft on-brand replies
- Summarise long ticket threads before escalation calls
- Spot trends across recent cases and flag at-risk accounts
- Produce QBR decks with case stats baked in

# Writing Great Prompts

## Be specific

State the outcome, the audience and the format you want.

*Instead of:*

*"Email the team"*

*Try:*

*"Send the sales team a short email summarising this week's top three CRM wins."*

## Give context

Point Cowork at the source — the email, the file, the meeting, the SharePoint folder.

*Instead of:*

*"Summarise the meeting"*

*Try:*

*"Summarise yesterday's CRM Connect kick-off and list the actions assigned to the sales team."*

## Iterate & refine

Treat it like a colleague — review, redirect, refine. The second go is almost always sharper.

*Then say:*

*"Make it shorter and more direct."*

*"Now draft a follow-up email to the customer."*

*"Schedule this to run every Monday at 8am."*

# Getting the Most from Cowork

## Do

- Start with the outcome — what good looks like, who it's for, how long it should be
- Point it at the source — an email, a meeting, a SharePoint folder, your CRM
- Iterate — ask for a shorter version, a different tone, a follow-up draft
- Schedule the repeat jobs — Monday pipeline brief, Friday status pack, month-end pack
- Always review before it sends — you're still the one signing it

## Avoid

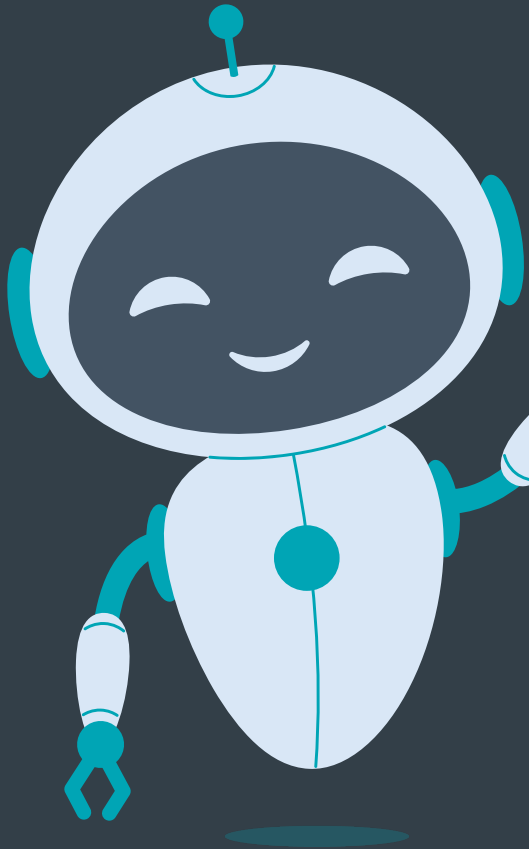
- Vague one-liners like "sort my inbox" or "write something for the team"
- Assuming it knows context you haven't shared — tell it who, what and why
- Sending its first draft straight to a customer without a quick read-through
- Treating it as a search engine — it's a doer, not a Google replacement
- Sharing client-confidential detail in places your data policy hasn't approved

# Examples

- Lets Jump into Copilot/CoWork
- Skills – Excel
- Review Inbox and draft replies
- Working with Company Templates
- Create a Training Course
- Test myself with a voice chat
- What can we learn from our agents HR Hub Resposnes
- Clean up my OneDrive

- With CRM
- Prepare for a Customer Meeting
- How's the event going?
- Sales reports through CoPilot

*Thank you!*



CRM

**connect**

FOR ALL THINGS DYNAMICS 365 CRM & POWER PLATFORM

