
What's new in Microsoft 365 Copilot

August 2026 edition



AUGUST 2026

Agenda

One-sentence summary

01 What's new this month

02 What the changes mean for partners and their customers

03 A closer look at Copilot Cowork — now generally available

04 Customer conversations

05 Q&A

This month at a glance

01

Copilot Cowork — now GA

Delegate multi-step work end to end. Full deep dive later this session.

02

Deeper citations

Answers linked to the exact part of the source — plus Power BI and Dataverse.

03

Vision in Copilot

Show Copilot your screen or phone camera and ask about it in voice.

04

Customisation in Excel

Reusable skills, personal preferences, and workbook rules that stay with the file.

05

Customisation in PowerPoint

Brand kits, reusable presentation skills, and reference-deck restyling.

06

Word workflows

Edits with Track Changes on, comment handling, and drafting workflows.

07

Planner Agent & Researcher

Plain-language plans, and research depth you choose per task.

08

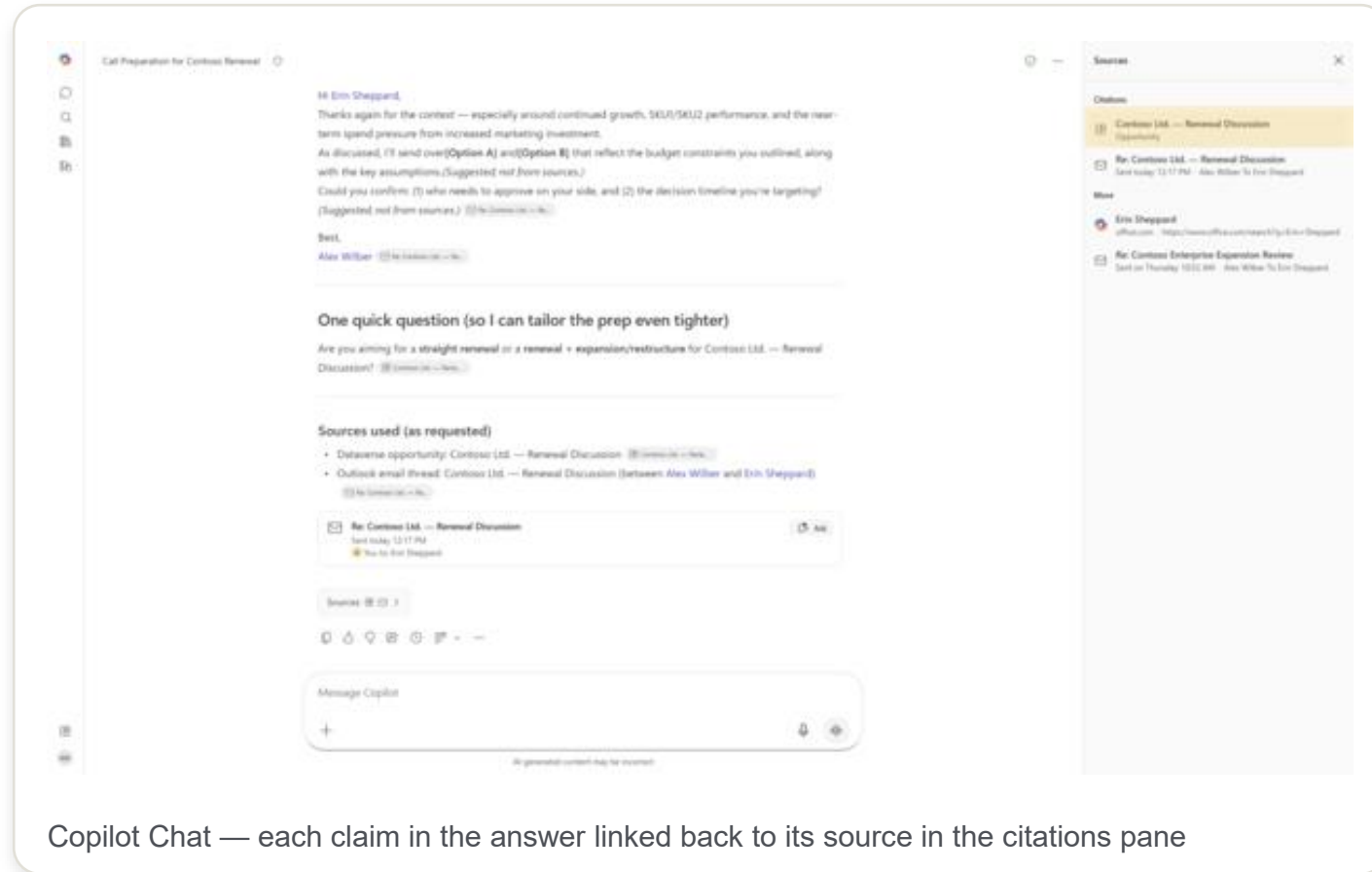
New models — and more

GPT-5.6, Claude Sonnet 5 and Opus 5, plus the month's smaller improvements.

WHAT'S NEW THIS MONTH

Deeper citations and grounded answers

Copilot now shows exactly where its answers come from - and can draw them from more of your data.



Copilot Chat — each claim in the answer linked back to its source in the citations pane

- **Citations point to the exact part of the source**

Not just which file — where in the file. Live now for Word and PowerPoint references; meetings, web pages and PDFs are next.

- **Power BI and Dataverse join the sources**

Ask in natural language and get grounded answers from Power BI reports and semantic models — and from Dataverse business records (GA in September).

- **Regenerate, in place**

Not the answer you needed? Try again or switch model directly in the response — no starting the conversation over.

WHAT'S NEW THIS MONTH

Vision in Microsoft 365 Copilot

Show Copilot what you're looking at - your screen or your phone camera — and talk it through.

- **Show, don't describe**

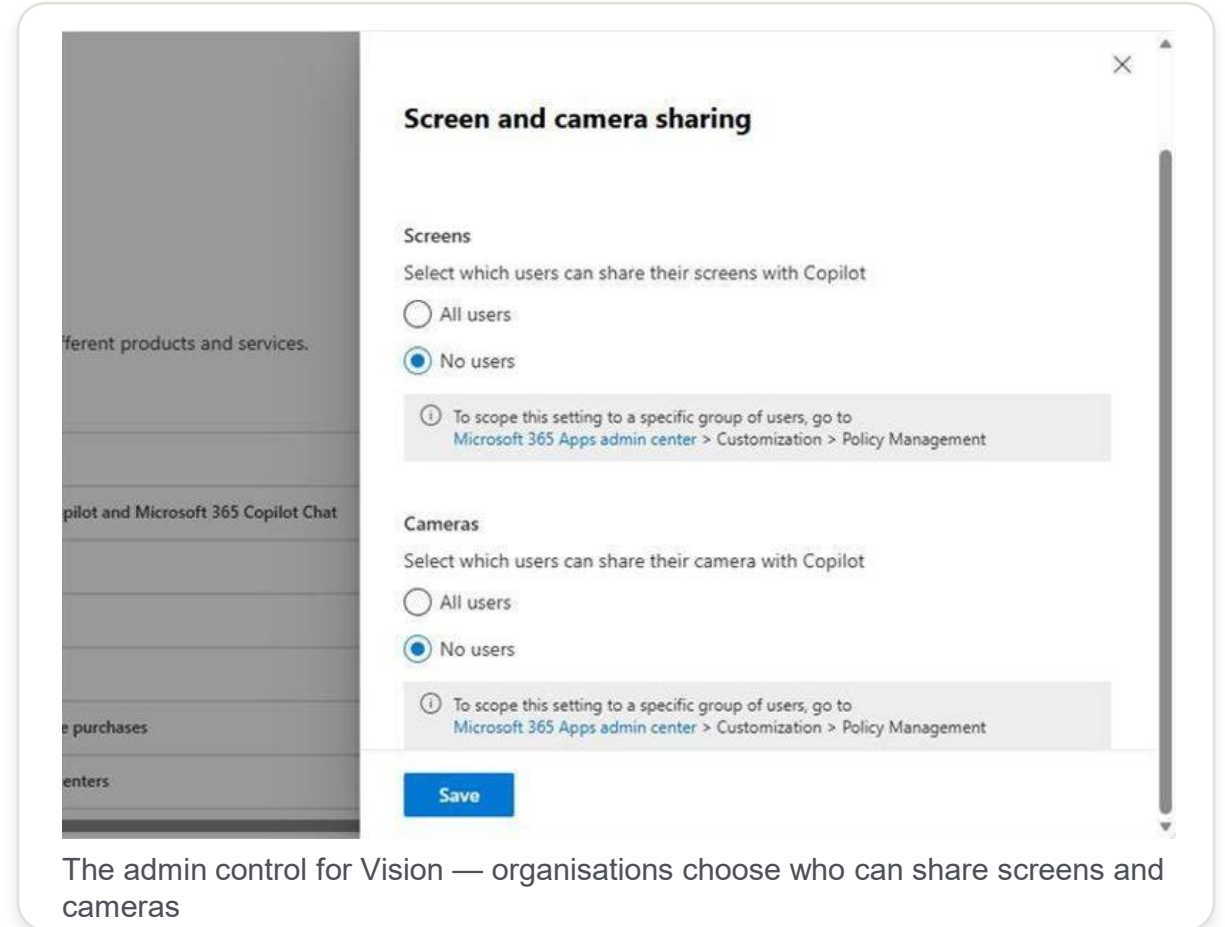
In a voice conversation, share your screen or point your phone camera at the problem — a dashboard, a document, an error message, a real-world object.

- **Answers with context**

Copilot combines what it sees with your work and web context to explain what's in front of you, surface insights, and guide next steps.

- **Admins decide where it runs**

A dedicated control shipped in June governs when and where screen and camera sharing can be used as model input.



Customisation in Excel

Skills, personal preferences, and rules that live with the workbook - so the standards apply to everyone who opens it.

	A	B	C	D	E	F	G	H
1	Customize Copilot for this workbook							
2	Replace these examples with your own preferences							
3								
4	e.g. Format currency as \$#,##0.00							
5	e.g. Use bold headers and alternating row colors for new tables							
6	e.g. Prefer XLOOKUP over VLOOKUP							
7	e.g. Our fiscal year starts in July							
8	e.g. Name new sheets with the format "Report - YYYY-MM"							
9								
10								
11								
12								
13								
14								
15								

◀ ▶

.Rules

Fiscal Report

+

A .Rules sheet — conventions Copilot follows for anyone editing this workbook

- Workbook rules**
A .Rules sheet captures structure, formatting, naming and formula conventions — with examples and references — and stays with the file.
- Personalization and skills**
Set standing preferences once (formats, naming, PivotTables, report styles) and package repeatable workflows as reusable skills.
- Coming in August**
A theme-design skill, Copilot grounded in Power BI data (row-level security respected), and support for AutoSave-off workbooks.

WHAT'S NEW THIS MONTH

Customisation in PowerPoint

On-brand by default - brand kits, reusable presentation skills, and decks that follow your own reference designs.

- **Brand kits, centrally managed**

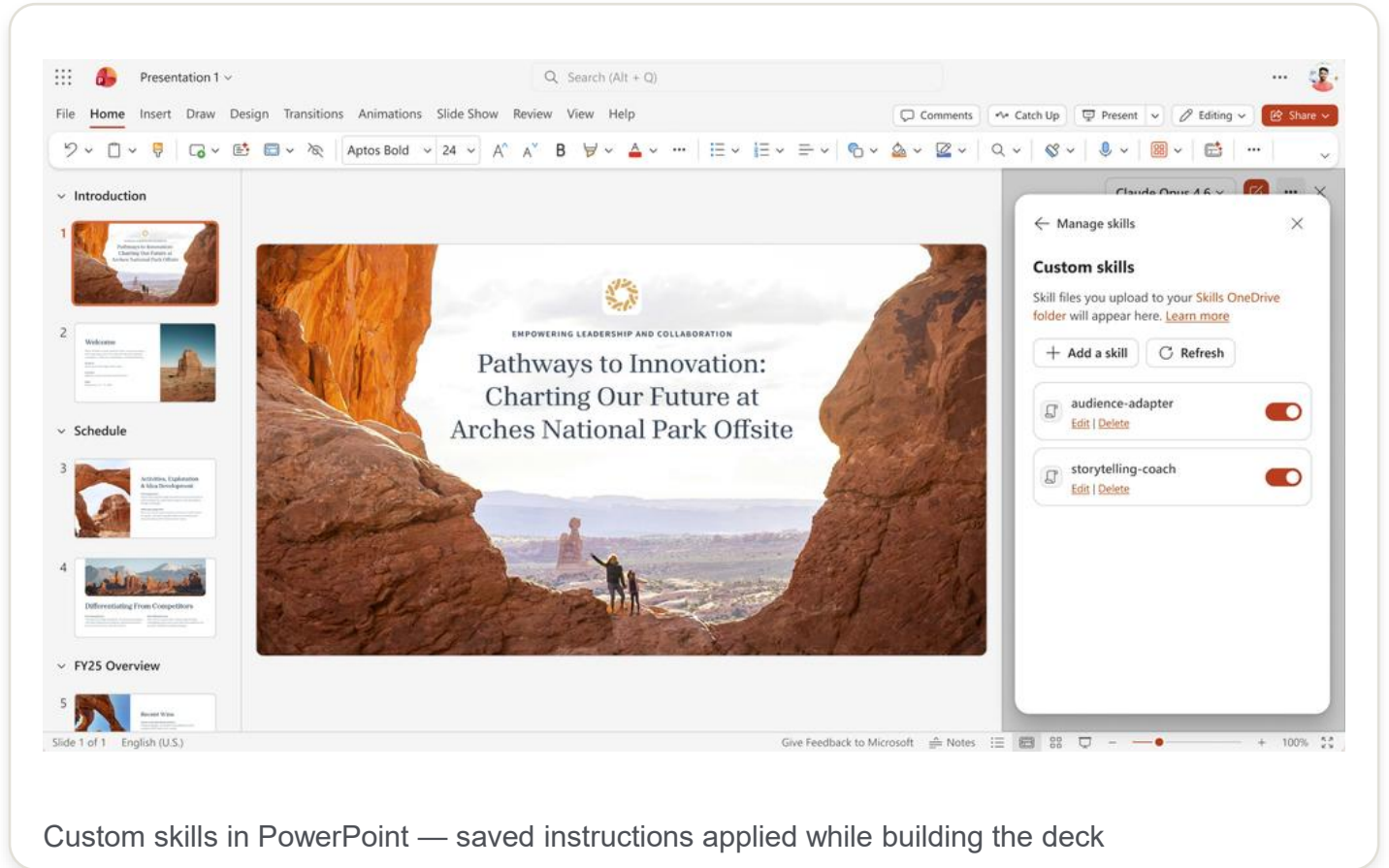
Build decks from admin-approved brand kits; from July, company assets — logos, icons, themes, fonts — come straight from the Microsoft 365 Brand kit.

- **Reusable presentation skills**

Save repeated instructions as skills Copilot applies in the flow of presentation work — custom user skills arrive via OneDrive in August.

- **Ground it, restyle it, review it**

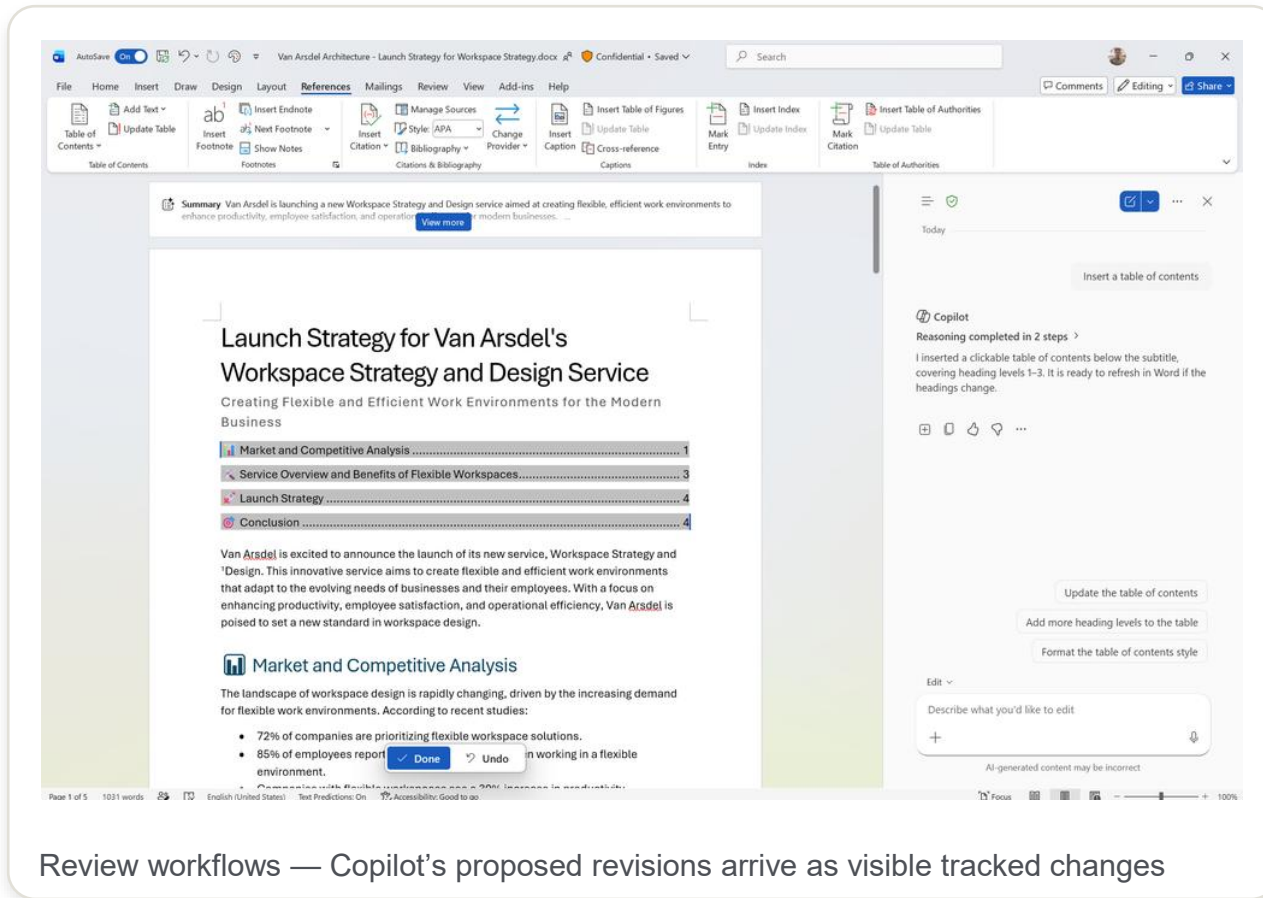
Reference SharePoint libraries and OneDrive folders, restyle a deck using another presentation's design, and let Copilot write, answer and resolve comments.



WHAT'S NEW THIS MONTH

Word workflows

Copilot edits like a colleague — revisions tracked, comments handled, documents kept in shape as they grow.



Review workflows — Copilot's proposed revisions arrive as visible tracked changes

● Edits arrive as tracked changes

With review workflows, every proposed revision is visible and approvable — and Copilot can add, read, reply to and manage comments.

● Drafting workflows

Copilot inserts and updates tables of contents, and manages headers, footers, page numbers, dates and footnotes as documents evolve.

● Continuity built in

Catchup recaps what changed since you last opened a document; chat history carries from Copilot Chat into Word; agentic editing reaches iOS.

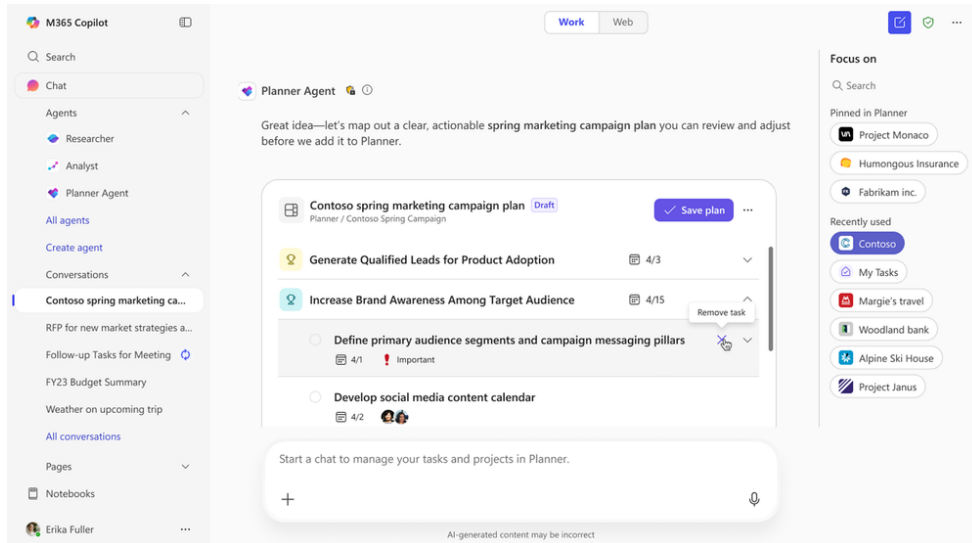
WHAT'S NEW THIS MONTH

Planner Agent and Researcher options

Delegate the planning, and decide how deep the research goes.

Planner Agent

Describe the work in plain language - the agent returns interactive task cards, prioritises across your Planner plans, and builds structured plans with goals and buckets.



A plain-language ask turned into a structured campaign plan

Researcher - models and modes

When Researcher joins a chat, choose the model and mode for each task — putting the depth and the approach of the research in the user's hands.

- **Quick look or deep dive**

Match the effort to the question instead of one fixed research pattern.

- **Per-task, in the conversation**

Switch model and mode as the work changes - no separate configuration.

- **Why it matters**

Depth drives time and quality; users now make that trade-off deliberately.

This is a simulated experience. User experience may vary.



Planner Agent

Created by Microsoft

Focus on All Planner content

Create a Microsoft Planner plan for launching a new Copilot adoption program for a 500-person customer organization. The launch date is 1 October. Build the entire plan with goals, buckets, milestones, dependencies implied through sequencing, and detailed tasks from planning through launch and success measurement.



Send

Explore

History



Prioritise work

Help me plan my tasks for this week.



Create new tasks

Draft new tasks from my meetings, emails, and chats.



Update existing tasks

I'm on leave today so move all my tasks to tomorrow.



Plan a project

Help me create a 12-week website redesign plan.



Quick plan insights

What's at risk in this plan?



Turn content to tasks

Create tasks from a file or meeting.

WHAT'S NEW THIS MONTH

Also this month

New models & other improvements

- **OpenAI GPT-5.6 — the preferred model (9 July)**

Optimised with OpenAI for knowledge work; stronger reasoning for multi-step tasks across Word, Excel, PowerPoint, Chat and Cowork.

- **Claude Sonnet 5 (2 July)**

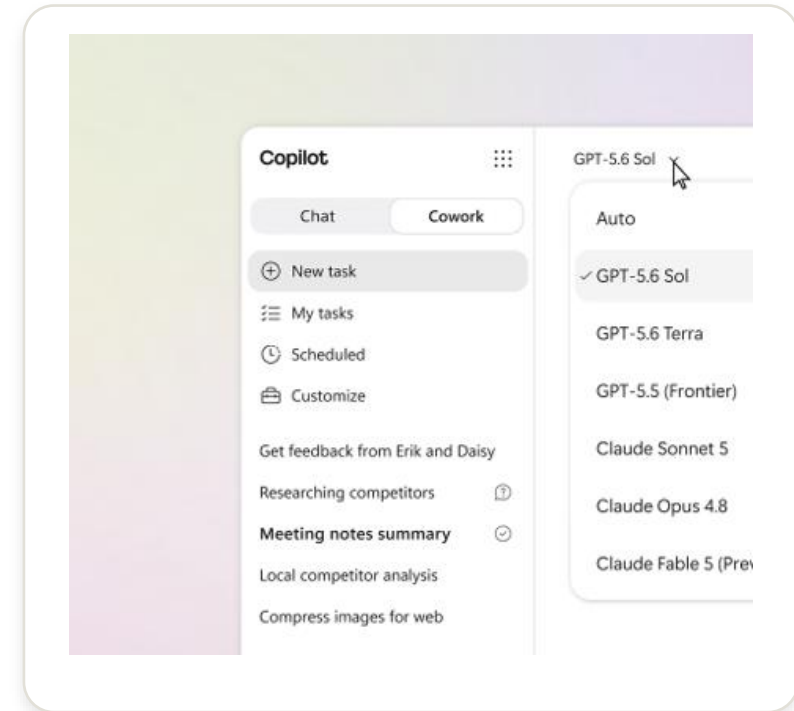
Built for agentic, multi-step work — performance close to Opus 4.8 at lower cost. In PowerPoint, Word and Cowork.

- **Claude Opus 5 (24 July)**

Anthropic's newest Opus, for everyday complex work — rolling out to the model selector in Word, Excel, PowerPoint, Chat, Cowork and Copilot Studio.

ALSO THIS MONTH

@mention Word, Excel and PowerPoint agents in Chat · Sales Agent GA · Teams Meeting recaps app · Notebooks for Copilot Chat users · mobile push notifications · new industry connectors



The model selector — choose per task, or let Auto decide

AUGUST 2026

What this month means

Three threads run through the June and July releases.

01 Verification is now built into the output.

Deep citations link an answer to the specific part of the source file, not just the file. Word edits from Copilot arrive as tracked changes that can be inspected and accepted like any colleague's. Generated files inherit sensitivity labels from their sources, and admins can now exclude external email and specific web domains from grounding.

What it means

The standard evaluation objections - can we trust it, can we audit it, can we control what it draws on - now have concrete product answers. The adoption conversation shifts from reassuring customers to showing them, and readiness work (permissions, labelling, DLP) becomes the obvious preparation step partners can deliver.

02 Customisation now exists at the organisation, user, and file level.

June and July added several mechanisms that store instructions outside the prompt: brand kits (organisation-level design assets, applied in PowerPoint and Excel), workbook rules (a .Rules sheet holding the conventions for a specific file), personalization in Excel (a user's standing preferences), and reusable skills (saved instructions for recurring tasks in Excel, PowerPoint, and Cowork). Previously, these instructions had to be included in each prompt; now they are stored at the level where they apply and used automatically.

For partners

Setting these up - building the brand kit, writing the rules sheets, authoring the skill library - is definable services work, and it is what determines how consistent a customer's Copilot output is across users.

03 From assistance to delegation.

The June and July releases cover the separate functions that delegating work involves. Planner Agent converts a plain-language request into a structured plan. Researcher's model and mode selection sets how much depth the agent applies. Scheduled prompts and Cowork's event-triggered tasks let work start on a schedule or in response to an email, @mention, keyword, or calendar event. Cowork, now generally available, executes multi-step tasks end to end and returns a completed deliverable, pausing at checkpoints for approval; its usage is billed through Copilot Credits under admin spending policies.

For partners

The corresponding services work is identifying which tasks are worth delegating, building the skills and triggers behind them, and configuring the cost controls and governance.

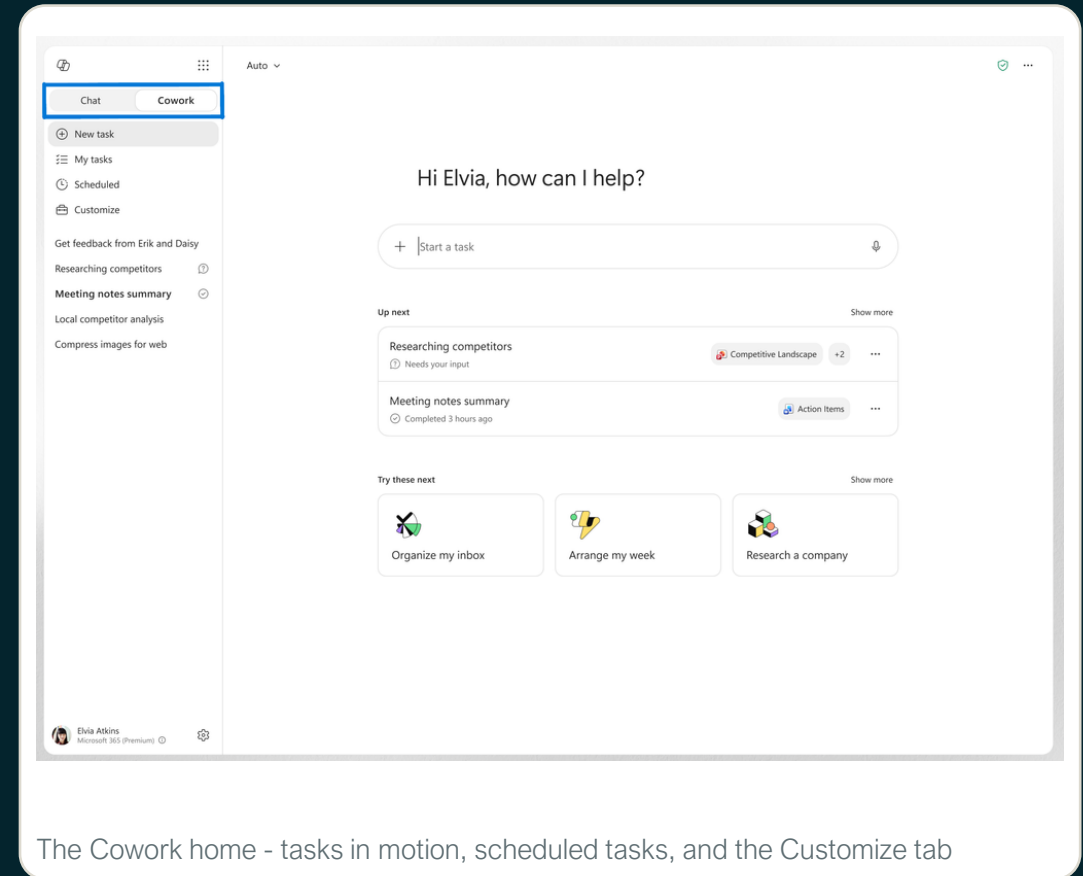
A CLOSER LOOK AT COPILOT COWORK

What is Copilot Cowork?

Generally available worldwide since June 2026.

“An agentic system that plans, executes, and delivers real work... returning a completed deliverable rather than a draft or recommendation.”

- 1 · Intent Describe the outcome you need.
- 2 · Plan Cowork builds a multi-step plan across your data and apps.
- 3 · Execute Runs minutes to hours in the cloud — even with the laptop closed.
- 4 · Checkpoint Pauses for your approval on emails, meetings, and file edits.



The Cowork home - tasks in motion, scheduled tasks, and the Customize tab

New chat

Search

Library

Create

Agents

Researcher

Analyst

Sales

Cowork [Share icon] [More icon]

PowerPoint

Word

New agent

All agents

Notebooks

Hire to retire

Ignite 2025

All notebooks

Chats [Search icon]

Adding Value Proposition and Pri...

Filling Value Proposition and Prici...

I'm working on a demo story abo...

Template for Zava Executive Briefi...

Files related to Project Next Zava...

Project Next Zava Executive Briefing

Apps

CF Cecil Folk [More icon]

Hi, try asking me to recap a meeting

Message Copilot

+ [Tools icon] Tools



Learn

Find

Summarize

Suggest

[More icon]

A CLOSER LOOK AT COPILOT COWORK

Where Cowork fits

The same task often works in more than one tool — pick the narrowest tool that delivers the outcome.

Ask

Copilot Chat

Answer, summarise, brainstorm.

Create

Copilot in the app

Build or change one artifact.

Specialize

Researcher · Analyst

Deep research, analysis, a repeatable role.

Delegate

Copilot Cowork

Coordinate a multi-step outcome across work.

Three tests before choosing Cowork

1 Is the work genuinely multi-step?

It needs planning and coordination, not just a good answer.

2 Does it span context or apps?

The relevant work is spread across email, meetings, files, or systems.

3 Is a finished outcome worth the consumption?

Saved effort, speed or quality clearly exceeds the cost of the task.

Rule of thumb: one app for one file · Cowork for an entire process.

Not an ideal fit: quick questions, one-off rewrites, single-file edits, research-only tasks.

Where Cowork creates value

Delegation gets practical — triggers, browser work, and skills your team can share.

● Event-triggered tasks

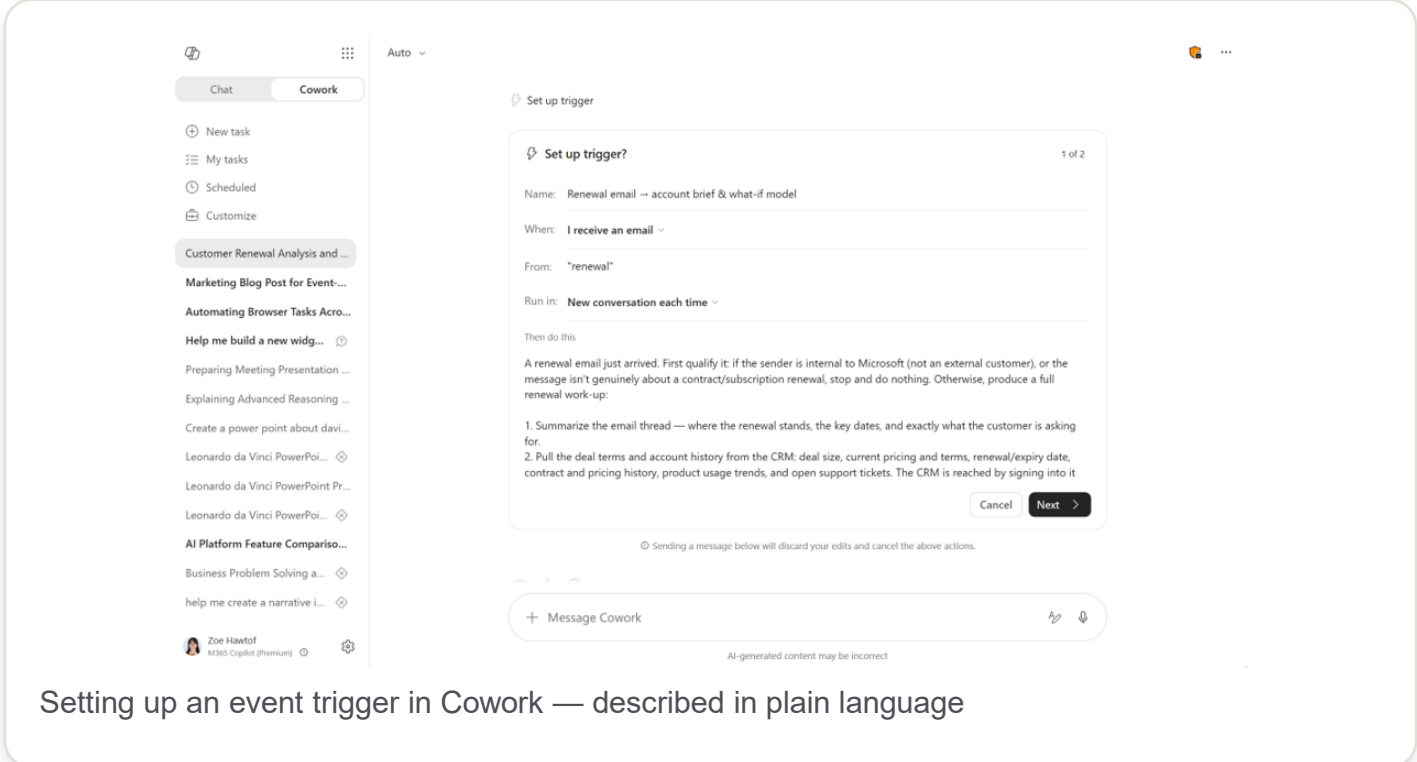
“Whenever my customer emails about the renewal...” — Cowork watches mail and Teams for a sender, @mention, keyword or event, and has a drafted response ready for approval. (Frontier)

● Browser automation in Edge

Cowork works across the web systems you sign into — service desks, billing portals, project trackers — right in your Edge browser.

● Skills you can build and share

Create a skill in a guided flow or drop in a .md, .zip or .skill file; share it across the org while staying the owner, so edits flow out automatically.

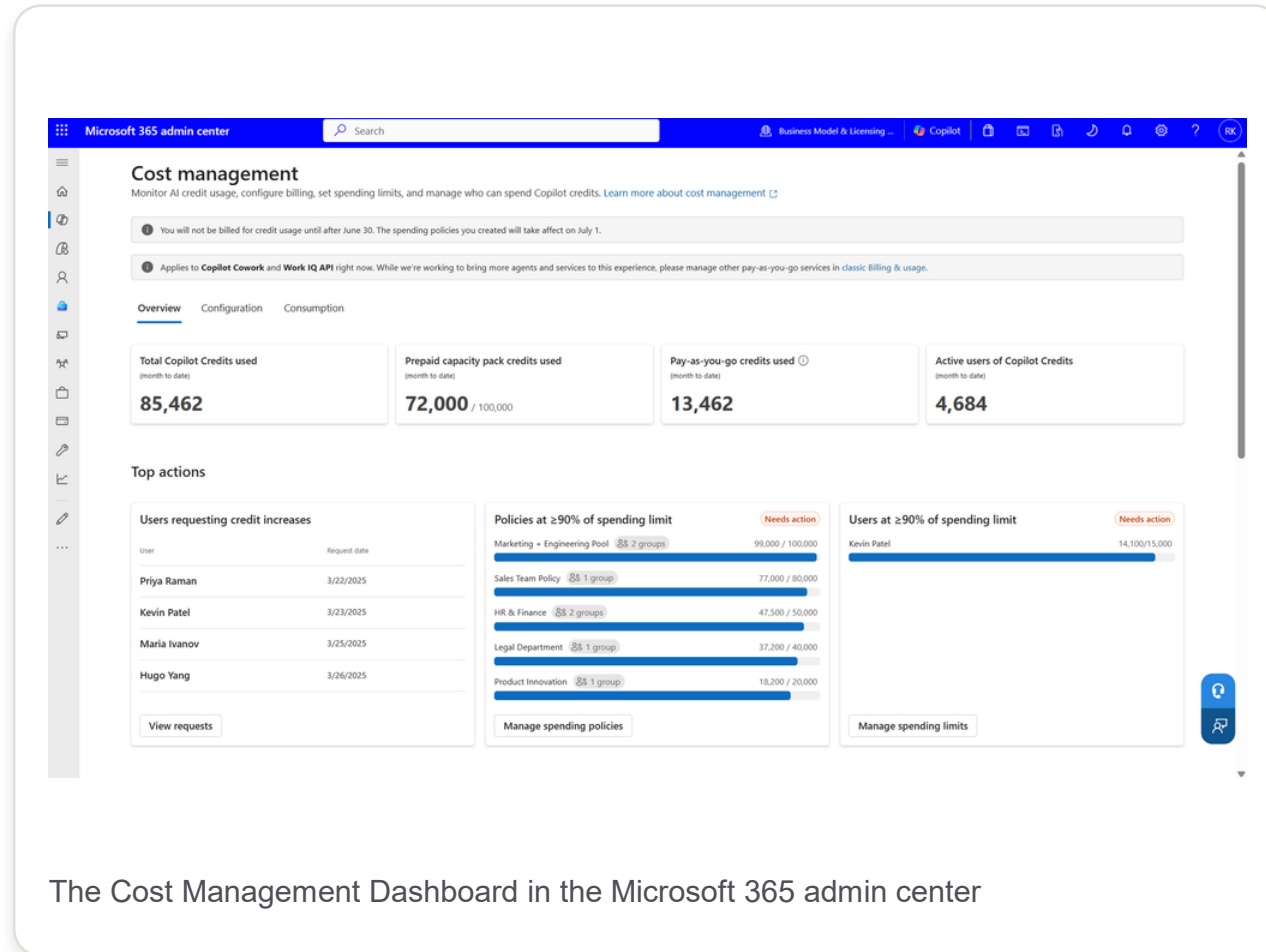


Setting up an event trigger in Cowork — described in plain language

Plugins bring your systems in — live: Harvey, LSEG, Moody's, Morningstar, S&P Global Energy, Miro, monday.com, Box, TeamsMaestro, enosix, Microsoft Fabric, Dynamics 365 — with Adobe, Atlassian, Canva, CB Insights, Statista, Templafy and Money Forward on the way.

Working with confidence

Governed like the rest of Microsoft 365 — and metered, with controls, when it runs.



The Cost Management Dashboard in the Microsoft 365 admin center

- **Purview extends to Cowork**

Sensitivity-label inheritance and display, audit logging, DSPM, Insider Risk, eDiscovery, Data Lifecycle and Communication Compliance — admins govern Cowork the way they govern Copilot today.

- **Usage-based, with controls**

The M365 Copilot license plus Copilot Credits per task. The Cost Management Dashboard sets budgets, spending policies and alerts; users can check /cost inside a task.

- **July refinements**

Improved alerts, clearer policy logic, and overage handling — a task that hits its limit finishes without billable overage.

Full billing mechanics: see the on-demand billing session.

A CLOSER LOOK AT COPILOT COWORK

The partner opportunity

Three ways to earn — and usage-based revenue is the new one.

License revenue

RECURRING PER-SEAT BASE

M365 Copilot seats, CSP margin and incentives — expands as users grow.

Services revenue

ENHANCED

AI strategy and business value, security and compliance controls, data readiness — plus governing and managing Copilot Credit spend (FinOps).

Usage-based revenue

NEW

Scales with the work AI performs: Cowork tasks and Work IQ API agents, billed through Copilot Credits — expands as usage deepens.

“Revenue grows as customers move from using AI as an assistant to executing long-running work.”

Four moves for FY27

- 1 Educate customers on usage-based billing — seats to outcomes
- 2 Transition Frontier customers to usage-based billing
- 3 Configure billing and cost controls from day one
- 4 Build the AI practice — adoption, agents, ROI as a service

New ASPX signals: Frontier-enabled tenants and free-to-paid upsell live now · Cowork usage/MAU and admin-settings signals arrive in Q1 FY27.

Copilot in 30

A new CSP-led motion to land first-time Copilot customers — live from August 1.

25-user, 30-day Microsoft 365 Copilot Business trial through CSP · new-to-Copilot accounts on Business plans, 50–300 seats · limited time

Land

Target the right customers

Build the list from the ASPX targeting criteria, run the ready-made campaign, and provision trials in Partner Center.

Prove value in 30 days

A guided weekly journey

Week 1 Outlook · Week 2 Teams meetings · Week 3 Word, PowerPoint and Excel · Week 4 agents — starter prompts and a turnkey customer kit included.

Convert with intent

Close before the trial ends

ROI readout plus a time-bound offer. Anchor a 50-seat conversion to unlock \$2.5K deployment funding; at minimum convert the 25 trial seats — trials auto-convert unless cancelled.

Everything is in the kit — targeting guidance, campaign emails, evaluation planner, admin setup guide, weekly email series, ROI readout template, sample conversion offer: aka.ms/Copilotin30Kit

Customer conversations

Citations & grounding

“Every answer is now verifiable at the source - and your Power BI data is part of it. Worth revisiting your Copilot governance posture?”

Vision

“Your field teams can show Copilot the problem instead of typing it.”

Planner & Researcher

“Delegate with control: structured plans from plain language, research depth you choose.”

Copilot Cowork

“Define the task; get back a completed deliverable, not a draft — grounded in your business, governed like the rest of Microsoft 365, pay for what you use.”

Excel

“Codify your spreadsheet standards once - they travel with the workbook.”

PowerPoint

“On-brand by default - brand kits make governance a feature, not a review step.”

Word

“AI edits with redlines - document trust for legal and professional teams.”

If they ask...

- “How do we keep costs under control?”

Usage-based AI is off by default. Admins set budgets, caps and alerts in the Cost Management Dashboard; pay-as-you-go is \$0.01 per Copilot Credit, with prepaid options at lower rates. A task that hits its limit finishes without billable overage — and users can check /cost at any time.

- “What happens to our data?”

It stays in your tenant. Prompts, responses and outputs are not used to train foundation models. Copilot only surfaces content the user is already permitted to access; sensitivity labels are inherited, and audit, eDiscovery and DSPM all apply - to Cowork as well as Copilot

- “How is this different from the AI tools we already have?”

It works where the work already is: grounded in your emails, meetings, files and business systems through Work IQ, acting inside Microsoft 365 governance, with outputs saved as governed, shareable files — and with Cowork, it completes multi-step work rather than assisting one step.

BEFORE YOU GO

Invite your customers. We'll run the session.

Our monthly Get to Know Microsoft 365 Copilot webinar — Crayon's Microsoft specialists deliver the session, while you stay the trusted advisor and owner of the customer relationship.

Why invite them

A low-pressure way to reconnect, progress opportunities, or introduce Copilot — ideal for Copilot-curious customers.

Customers see live demos, learn the difference between Copilot Chat, Microsoft 365 Copilot and agents, and walk away knowing where Copilot adds value — and the confidence to take next steps.

You get an attendance report after each session, so follow-up is easy — your customers remain yours.

Everything you need to promote it

We've removed the heavy lifting — the Campaign-in-a-Box gives you a complete set of ready-made marketing assets:

- Customer invitation emails
- Social media posts
- Ready-to-use promotional messaging

Personalise with your branding, invite your customers, and we'll take care of delivering an engaging webinar experience.

[Click Here](#) for upcoming dates, registration and the Campaign-in-a-Box download.