



Microsoft 365
COMMUNITY CONFERENCE

Work IQ Fundamentals

Ben Summers

April 24th, 2026

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Uhova

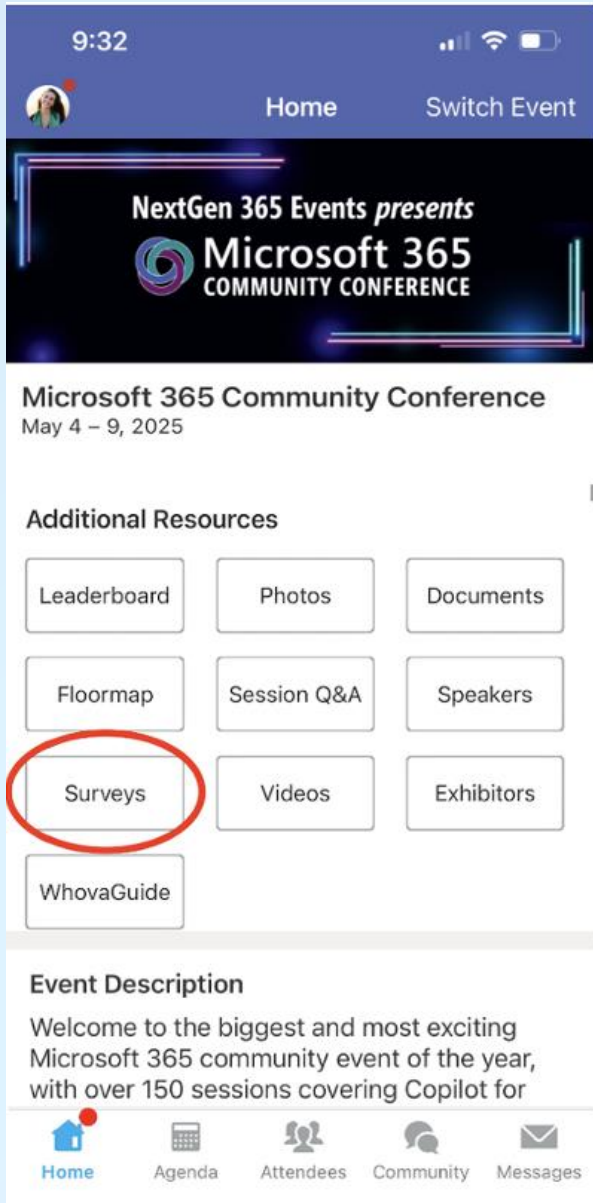
The official event app for the
Microsoft 365 Community Conference

Event invitation code: Orlando2026



Join the event app to access:

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Session feedback surveys

We want to hear from YOU!

Share your feedback to make next years conference even better!

Here's how –

- Simply go to the Whova App on your smartphone.
- Scroll down on the M365 Community Conference Homepage to 'Additional Resources' to click "Surveys".
- Click Session Feedback.
- Scroll down to find this session title.
- Complete the session feedback survey.
- Finally, click 'Submit'.

It's just that easy!



Ben Summers

Director – Copilot
Marketing

[/benjamin-summers](#)

Today's agenda

- **Open:** A few introductory words
- **Fundamental 1:** (M)architecture – what is Work IQ?
- **Fundamental 2:** Security
- **Fundamental 3:** Customization
- **Fundamental 4:** Extensibility
- **Close:** key takeaways

But first...

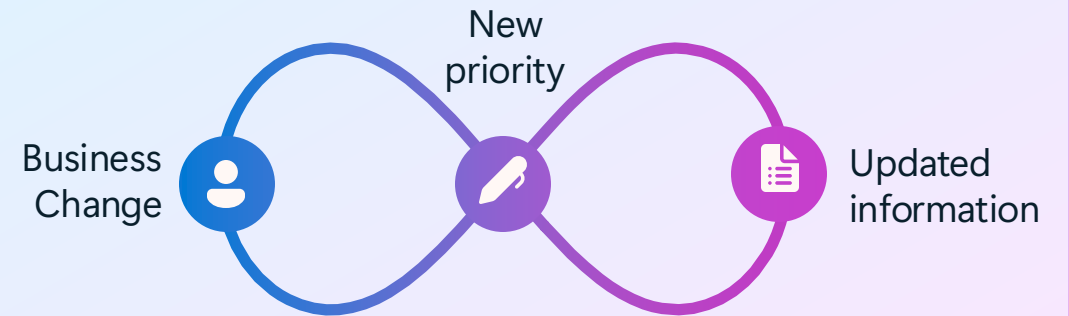
Work is always changing

AI today



Data is fragmented

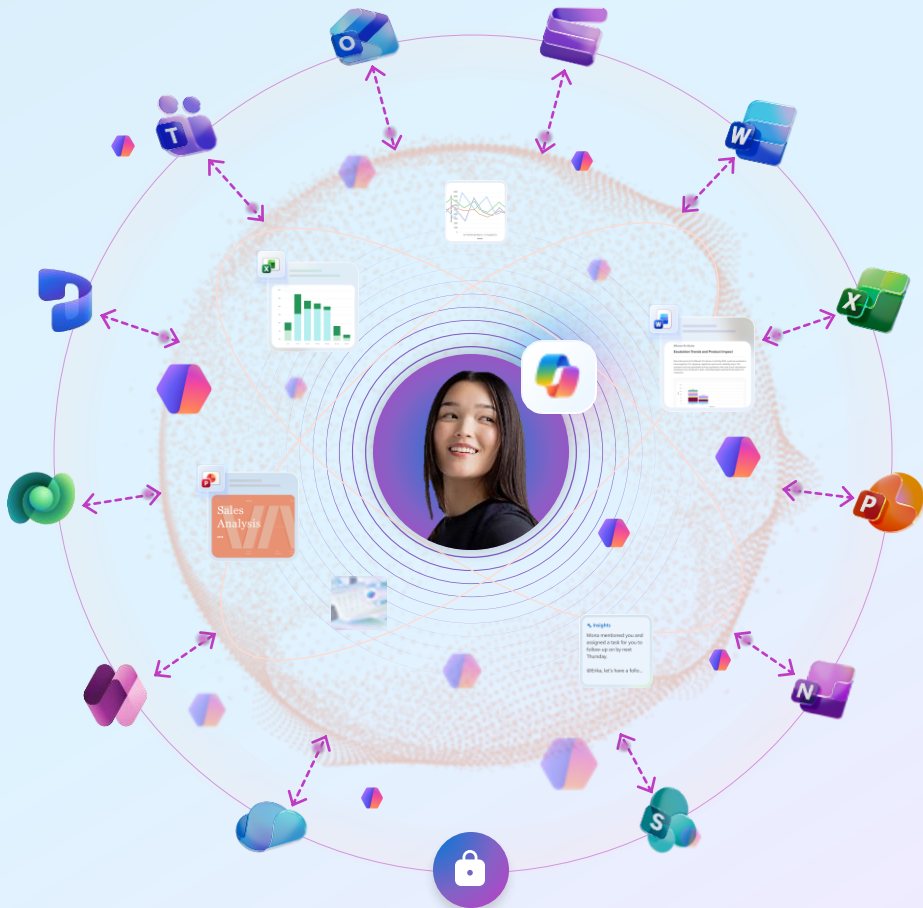
How work actually happens



Continuous, evolving, connected

Work IQ

The intelligence layer that personalizes Copilot to you and your organization



Skills & Tools

Provides specialized instructions to customize Copilot and agents to deliver tailored experiences optimized for specific tasks.

Context

Uses memory to learn from your unique style, preferences, habits, and workflows, understanding your patterns over time.

Data

Combines everyday work with external data, including M365 signals and LOB data to give Copilot real-time understanding.

Fundamental 1

(M)Architecture

What is Work IQ?

Work IQ

Experiences

M365 Copilot, M365 apps, D365 + LOB apps, & pre-built agents

Extensibility

Custom-built agents through Copilot Studio, Foundry, and GitHub

Skills and Tools

Skills

Tools

Context

Memory

Activity

Business understanding

Data

Microsoft 365

Dynamics 365 + Power Apps

Power BI

Other business data

Multi-Model

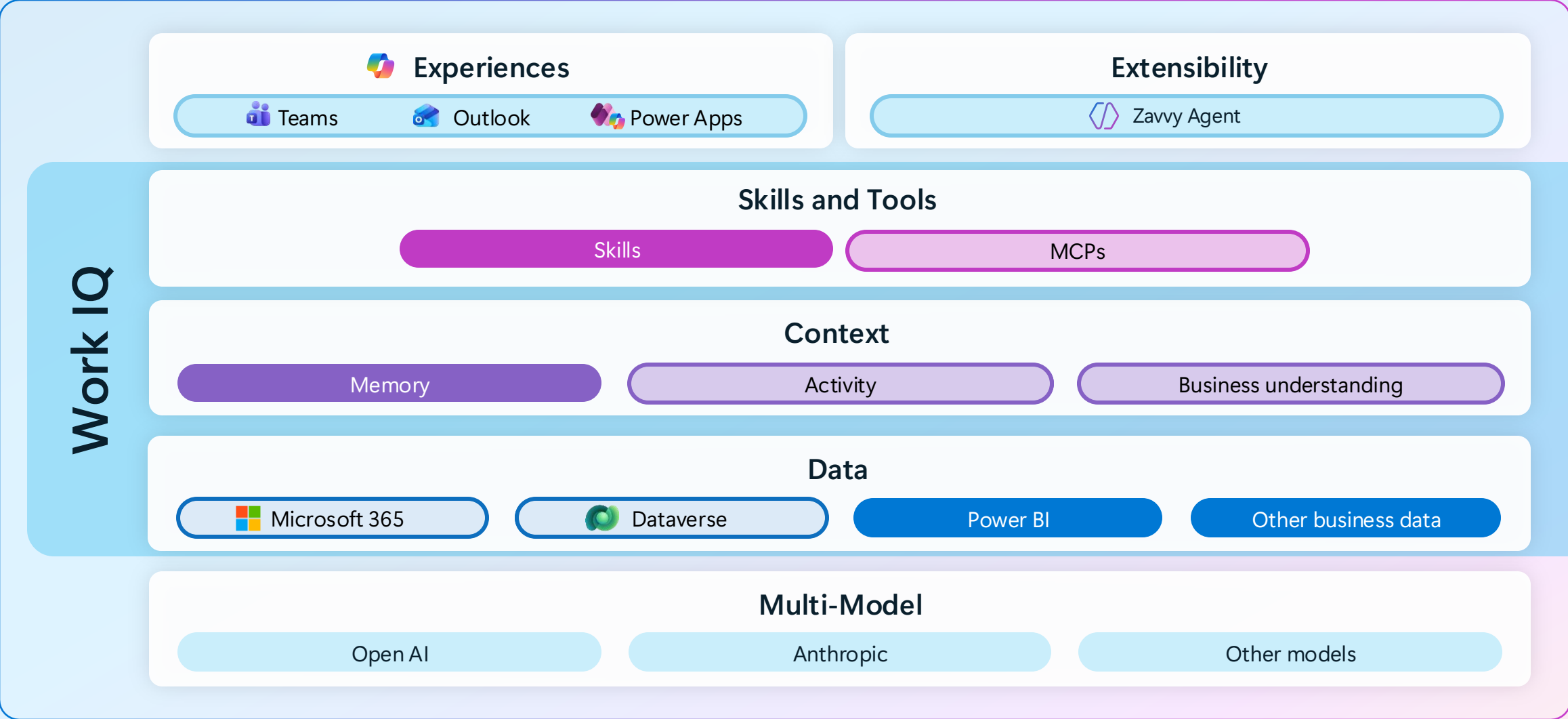
Open AI

Anthropic

Other models

Demo

How it works



Fundamental 2
Security

Secure by design, governed by default

Microsoft data, privacy & security commitments

🔒 Experiences

M365 Copilot, M365 apps, D365 + LOB apps, & pre-built agents

🔒 Extensibility

Custom-built agents through Copilot Studio, Foundry, and GitHub

Work IQ

🔒 Skills and Tools

Skills

Tools

🔒 Context

Memory

Activity

Business understanding

🔒 Data

Microsoft 365

Dynamics 365 + Power Apps

Power BI

Other business data

🔒 Multi-Model

Open AI

Anthropic

Other models

Demo

Microsoft 365 Admin Center

Fundamental 3

Customization

Customization

Microsoft data, privacy & security commitments

Experiences

M365 Copilot, M365 apps, D365 + LOB apps, & pre-built agents

Extensibility

Custom-built agents through Copilot Studio, Foundry, and GitHub

Work IQ

Skills and Tools

Skills

Tools

Context

Memory

Activity

Business understanding

Data

Microsoft 365

Dynamics 365 + Power Apps

Power BI

Other business data

Multi-Model

Open AI

Anthropic

Other models

Customization points

Skills

Tools

} **Build agents and skills** that compliment Work IQ and tailor Copilot to personal and organizational workflows.

Memory

Customize memory with **explicit instructions**

Activity

Stay tuned!

Business understanding

External data ingested through Microsoft 365 Copilot connectors and Power Platform connectors are semantically indexed.

Microsoft 365

Microsoft 365 Copilot connectors enable the import of external data sources into Microsoft Graph

Dynamics 365

Power Platform connectors enable the import of external data sources into Dataverse

Power BI

Stay tuned!

Other business data

Microsoft 365 Copilot federated connectors enrich Work IQ with external data sources

Fundamental 4

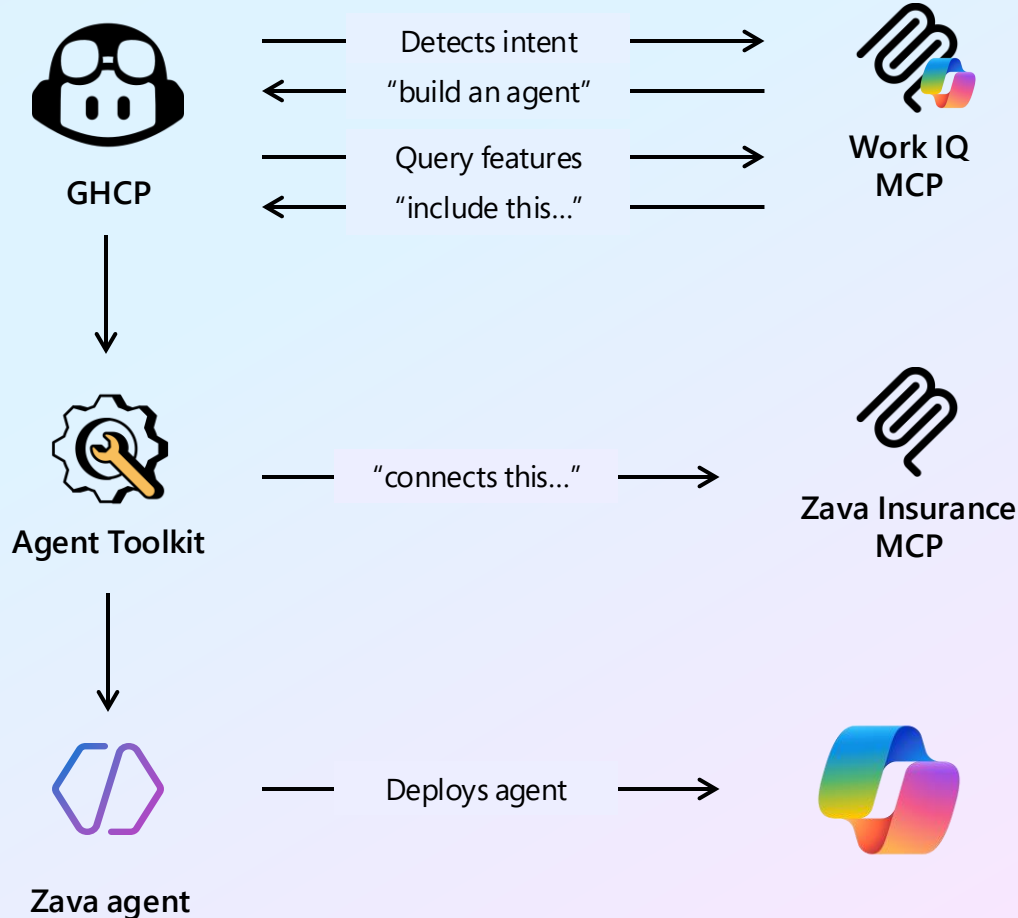
Extensibility

Demo

Work IQ CLI

How it works

> I had a chat in Teams with Ben and Darrel with were discussed the availability of the MCP server from the claims team. Based on the content of the thread and all feature requests we iterated on to make it more relevant for them, build a declarative agent that will deliver the expected scenarios.









And finally...

Closing thoughts

Wrap-up: Work IQ value

- **Decisions** powered by a real-time view of your entire business
- More **action** from a single surface; less **context** switching
- A **platform** that can leverage your existing data estate for agentic AI
- The **governance** and **trust** you expect from Microsoft

Try out these prompts!

Where you use Copilot	Scenario	Prompt	How Work IQ powers this
 Copilot Chat	Recall what was discussed in a meeting	Over the past [timeframe] with I had a meeting with [person's first name], I asked about [specific topic or project]. Can you look for the information [person's first name] shared around this in that meeting?	Skills and Tools Microsoft 365 data
 Copilot Chat	Consolidate assigned tasks	Identify tasks or action items assigned to me from my manager in this week's emails, Teams chats, and meeting notes, and compile them into a checklist	Activity Microsoft 365 data
 Copilot in Word	Summarize project context	Draft an executive summary of [project] that highlights the purpose, progress, and implications	Activity Microsoft 365 data
 Copilot in Outlook	Manage calendar conflicts	Recommend how to resolve conflicts on my calendar for tomorrow	Activity Microsoft 365 data
 Researcher	Prep for a compete conversation	What can you tell me about [Competitor name]? How do the offerings in [Competitor name] compare with [Company name] offerings? If you were in a compete situation against [Competitor name], what would you leverage as [Company name] response to our tooling and how a customer can accomplish the same thing? Pull in context from emails and Teams chats shared by the [Customer name] account team.	Microsoft 365 data Skills and Tools
 Copilot in Dynamics 365 Sales	Deal risk assessment	Find the email with the latest price changes, analyze impact to my opportunities, and recommend next steps for me to communicate the changes	Dynamics 365 data Business understanding

Be sure to check out...

Developers

MS92

Understanding Work IQ API

Admins & end-users

MS13

Planner, Copilot and agents: AI assisted projects with Work IQ

MS82

Unlock the full power of Microsoft 365 Copilot and agents with Work IQ

Also recommended

MS55

Agent 365: Secure, govern, and scale agent management

MS88

Secure and Govern Microsoft 365 Copilot - What Every IT Pro Needs to Know

LT04

Securing AI with Microsoft Purview: From Visibility to Action

LT12

How Microsoft Does IT: Microsoft 365 Governance in the age of Copilot & agents

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Home / Microsoft 365 Copilot

Microsoft 365 Copilot

Deliver value and employee satisfaction with our tools for Microsoft 365 Copilot deployment and adoption. This powerful technology combines the power of large language models (LLMs) with your organization's data – all in the flow of work – to turn your words into one of the most powerful productivity tools on the planet.

Microsoft 365 Copilot Chat and in-app experiences provide real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

[Looking for Copilot resources for Small and Medium Businesses? >](#)

<h3>Copilot Success Kit</h3> <p>Our Success Kit empowers you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools.</p> <p>Download here ></p>	<h3>Copilot Chat and agent starter kit</h3> <p>This new kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.</p> <p>Explore the kit ></p>	<h3>Join the Copilot community</h3> <p>The Microsoft 365 Copilot community is your hub for the official blog, latest news, and discussions.</p> <p>Join now ></p>
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Microsoft 365 Copilot

Welcome to the Microsoft 365 Copilot community. Your hub for the latest news, live events, and discussions on Microsoft 365 Copilot. For help & learning (how-to articles and training resources), please visit [Microsoft 365 Copilot Adoption hub](#).

Search this community

[Unfollow](#)

#M365Con

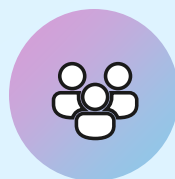
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Stay Connected!

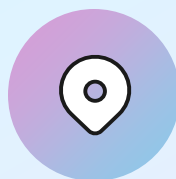
Engage with the best
community in tech...
There's something for
everyone!



Microsoft Tech Community

The community platform for Microsoft 365 –
forums, blogs, and events

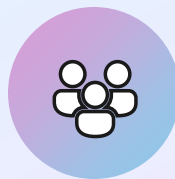
<https://aka.ms/joinMTC>



CommunityDays.org

Find or host a local event in your area
or to match your interests

www.communitydays.org



Microsoft Community on LinkedIn

News, announcements and training delivered to
your news feed

<https://aka.ms/microsoftcommunitylinkedin>



The one stop shop for Microsoft ecosystem community events

The screenshot displays the Microsoft Community Days website interface. At the top left is the logo "Community Days Supporting the Microsoft Community". The main header features the text "Discover Community Events happening across the world." Below this is a search bar and navigation options for "WHEN" (Upcoming Events) and "VIEW AS" (Titles). A filter section includes "WHERE" (Global, Country, Region, Sub Region) and "FILTERS" (Registration Open, Call for Speakers, Call for Sponsors, Hide Paid, Hide Others). The main content area is a grid of event cards, each with a unique background image and event details:

- FABRIC DATA DAYS**: Nov 4 - Dec 11, 2025. Location: Your city, Your country, United States. Format: Hybrid. Cost: Free.
- SMARTCLOUD 365 - 2025**: November 25, 2025. Location: Germany. Format: Virtual. Cost: Free.
- DYNUG AUTUMN CONFERENCE 2025**: November 25 - 26, 2025. Location: Oslo, Gardermoen, Norway. Format: Paid. Cost: 1,311.88.
- SHIFT ENTER SUMMIT 2025**: November 26, 2025. Location: Budapest, Hungary. Format: Paid.
- AI COMMUNITY CONFERENCE - TORONTO 2025**: November 28, 2025. Location: Toronto, Ontario, Canada. Format: Free.
- SEASON OF AI - MCP**: November 28, 2025. Location: Gurgaon, Haryana, India. Format: Hybrid. Cost: Free.
- ESPC25**: December 1 - 4, 2025. Location: Dublin, Dublin 1, Ireland. Format: Paid.
- MSREBUILD 2025**: December 2, 2025. Location: Nantes, Pays de la Loire, France. Format: Free.
- TECHBAYANIHAN 2025**: December 3 - 4, 2025. Location: Manila City, National Capital Region, Philippines. Format: Free.

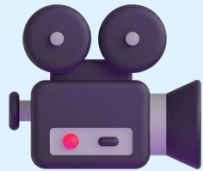
www.communitydays.org



SharePoint at 25 short film: *More than Code*

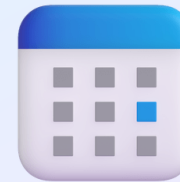
In honor of SharePoint's 25th birthday, *More Than Code* is a short film that explores the people, passion, and innovation behind one of the most transformative platforms in modern work. This film captures the stories of builders, leaders, and community champions who helped shape SharePoint into the knowledge backbone for collaboration, Copilot, and the next generation of agents.

SharePoint is more than code—it's 25 years of connection, innovation and impact.



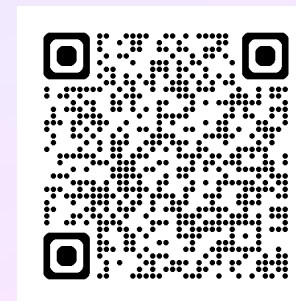
Watch the digital premiere

Stream the documentary online globally in late April and celebrate SharePoint's 25-year journey from anywhere.



Watch the SharePoint at 25 digital event

Prepare for the film with a special digital event featuring insights, stories, and what's next for SharePoint in the era of AI.



Join MGCI – Learn, Share, Grow.

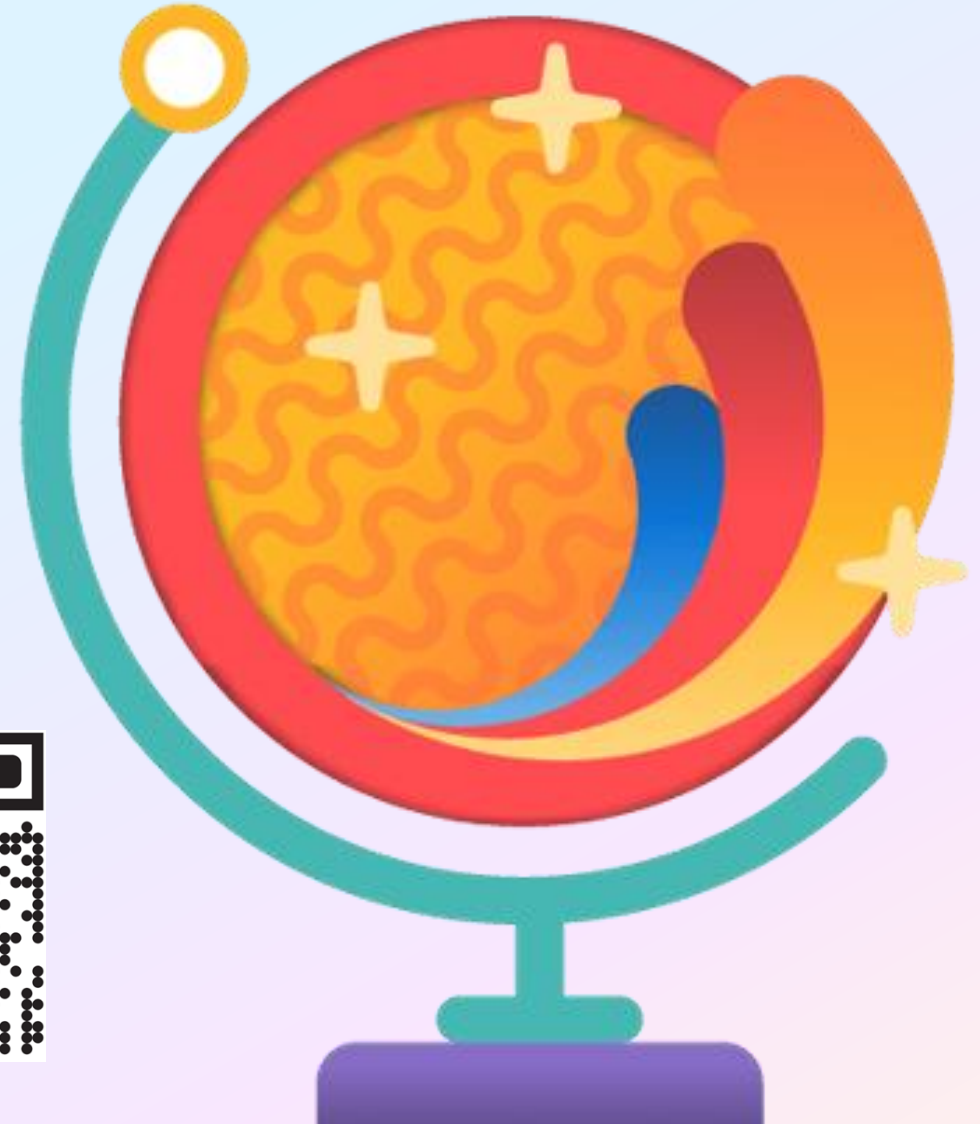
The Microsoft Global Community Initiative (MGCI) - Empowering global Microsoft communities with the tools, training, and resources to create impactful events and amplify diverse voices.

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Event producers unite!

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