AI AT WORK- Charter Group Annual Conference 2026

From chat to agents

Copilot, Cowork, Claude and ChatGPT | Current as of 20 October 2026

A practical guide for professional services firms

Daniel Teacher – CEO – T-Tech

What each platform is for, how the market has moved, and how to adopt it with control.

TODAY

One decision framework, start to finish

01	**AI in action**	Recent developments, live demonstrations and the Agent Store
02	**The AI landscape**	Copilot, Cowork, Claude and ChatGPT: from chat to agents
03	**Putting AI to work**	Platform choice and professional services use cases
04	**Cost and control**	Tokens, worked costs, governance and data readiness
05	**Foundations and action**	Line of Sight, adoption, measuring value, next steps and Q&A

The market moved from better models to operating systems for work

Microsoft Copilot

September: Cowork added new models, the Frontier App skill, mobile plugins and editing of existing Office files. August: local Edge browser use moved to general availability and event-driven tasks arrived.

Claude

Claude moved further towards longer, more independent work. Updated usage rules cover higher-risk use, deceptive activity and autonomous physical actions.

ChatGPT / OpenAI

September brought a new model family and enterprise privacy capabilities. October expanded access and added interactive answers.

Key releases from 22 August to 20 October 2026. Availability varies by plan, tenant and rollout channel.

DEMONSTRATION

AI in action

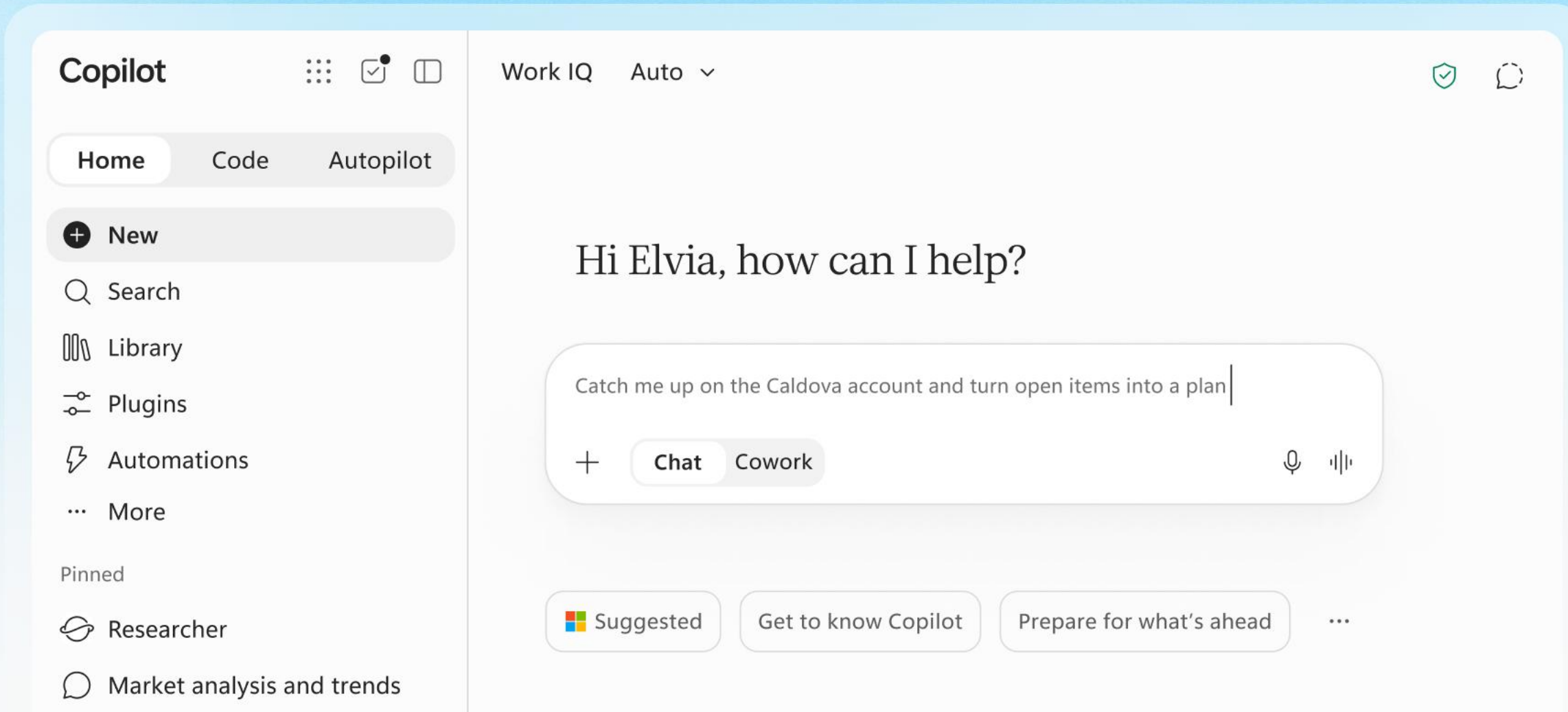
A closer look at the tools and Agent Store

Your new OS for *work*

Microsoft Copilot


Fable 5.1

Home


Copilot
Work IQ
Auto
Home
Code
Autopilot
New
Search
Library
Plugins
Automations
More
Pinned
Researcher
Market analysis and trends
Hi Elvia, how can I help?
Catch me up on the Caldova account and turn open items into a plan
Chat
Cowork
Suggested
Get to know Copilot
Prepare for what's ahead

DEMO

Agent Store demonstr



THE LANDSCAPE

The AI landscape

Four platforms and the shift from chat to agents

Four platforms, four operating models

Microsoft Copilot

Work-grounded AI across Microsoft 365. Chat and Search for immediate work; Cowork for delegated outcomes.

Copilot Cowork

Executes long-running, multi-step work across files, messages, browser tasks, plugins and automations.

Claude

Separate enterprise platform for deep analysis, long-horizon knowledge work and coding.

ChatGPT

Broader workspace spanning chat, connected apps, agents, coding and collaborative content creation.

Choose by where the work lives, what action is needed and how it will be governed.

THE STRATEGIC SHIFT

AI has moved beyond prompting

1



CHAT

Ask, draft, summarise and search.

2



DELEGATE

Hand over a defined outcome.

3



AUTOMATE

Run on a schedule or when an event occurs.

4



OPERATE

Monitor agents, spend, identity and policy.

The new question is not “which chatbot is smartest?” It is “which system can complete this work safely?”

SECTION 01

The Microsoft work system

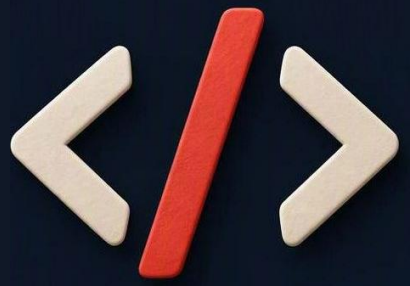
From immediate answers to delegated work, automation and persistent agents.



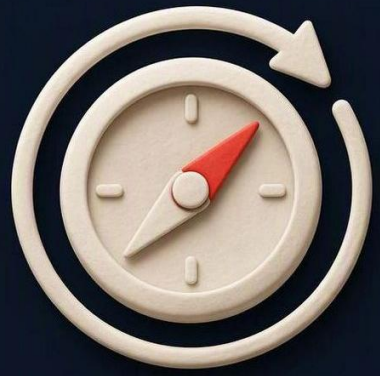
CHAT



COWORK



CODE



AUTOPILOT

What you can hand over now



Existing Office files

Edit Word, Excel and PowerPoint files while preserving the shared file and its version history.



Browser work

Complete web tasks in local Microsoft Edge using existing sign-ins and organisational policies.



Automations

Run scheduled prompts or event-driven tasks triggered by matching emails or Teams messages.



Apps

Create lightweight interactive apps from a description using the Frontier App skill.



Plugins and skills

Use partner plugins, custom skills and workspace files as inputs to tools.



Mobile

Access Cowork and configure plugins through supported mobile experiences.

T-TECH

Same brief, four different jobs

“Get me ready for Monday’s client review.”

Copilot Chat

Finds and summarises relevant meetings, messages and files.

Cowork

Builds or updates the brief and deck, schedules preparation and drafts communications.

Claude

Performs deep document analysis and redrafting in a separately governed workspace.

ChatGPT

Works across connected apps and collaborative content tools.

Efficient work

Everyday drafting, extraction and routine execution. Default here unless the task needs more depth.

Complex work

Use stronger reasoning for difficult professional work, deeper analysis and multi-step decisions.

Frontier work

Use the strongest models for more ambitious or difficult work.

SECTION 02

Where separate AI platforms fit

The choice is about work pattern, data location and control.

COPILOT • CLAUDE • CHATGPT

DECISION TABLE

Choose by work pattern, not by hype

Need	Copilot Chat	Cowork	Claude	ChatGPT
Quick work-grounded answer	**Best fit**	Possible	Possible	Possible
Execute a Microsoft 365 workflow	Limited	**Best fit**	Connector-led	Connector-led
Deep specialist analysis	Good	Strong	**Best fit**	Strong
Build or edit collaborative slides	PowerPoint / Office	PowerPoint files	Document-led	Slides workspace
Govern agents at enterprise scale	Microsoft controls	Microsoft controls	Separate controls	Separate controls

IN PRACTICE

Putting AI to work

Platform choice and professional services use cases

Where agents can earn their keep



Client onboarding

Create or update packs, folders, actions and meeting preparation from one controlled brief.



Partner briefings

Combine diary, inbox, meeting and file context into a structured daily or weekly briefing.



Reporting cycle

Update existing workbooks, narrative reports and presentation packs without creating stray copies.



WIP and debtors

Identify exceptions, draft communications and prepare follow-up activity for approval.



Proposal assembly

Bring credentials, prior work and approved pricing into a reviewable first draft.



Regulatory watch

Monitor defined sources and create structured summaries for human review.

SECTION 03

Control is part of the product

Models, agents, permissions, spend and data readiness must be managed together.



COST • SECURITY • DATA • ADOPTION

AI IN PLAIN ENGLISH

Tokens: the little pieces AI reads and writes



Think of text in pieces

A token can be a whole word, part of a word or punctuation.

100 tokens ≈ 75 English words

A rough guide. It varies by model and language.

WORKED EXAMPLE: CREATE A 20-SLIDE PRESENTATION

Slide copy + notes: 10,000 tokens ÷ 1m × $8 = $0.08

Ai Transcription of a meeting approx. $1

AI Providers are making huge losses, these prices will not hold!

Illustrative token volumes, one draft. GPT-4.1 API, USD. Excludes images, layout tools, revisions and tax.

Better agents amplify both good and bad information architecture



GOVERNANCE

- Approved AI policy and tool list
- Named business owners for each workflow
- Human approval points for sensitive actions
- Data retention and model rules
- Incident and exception process



DATA FOUNDATION

- SharePoint and OneDrive as working systems
- Permission and oversharing remediation
- Clear ownership and lifecycle rules
- Searchable, structured knowledge
- Secure Score and Purview controls

NEXT STEPS

What happens next

Monday's actions and the foundations for adoption

LINE OF SIGHT

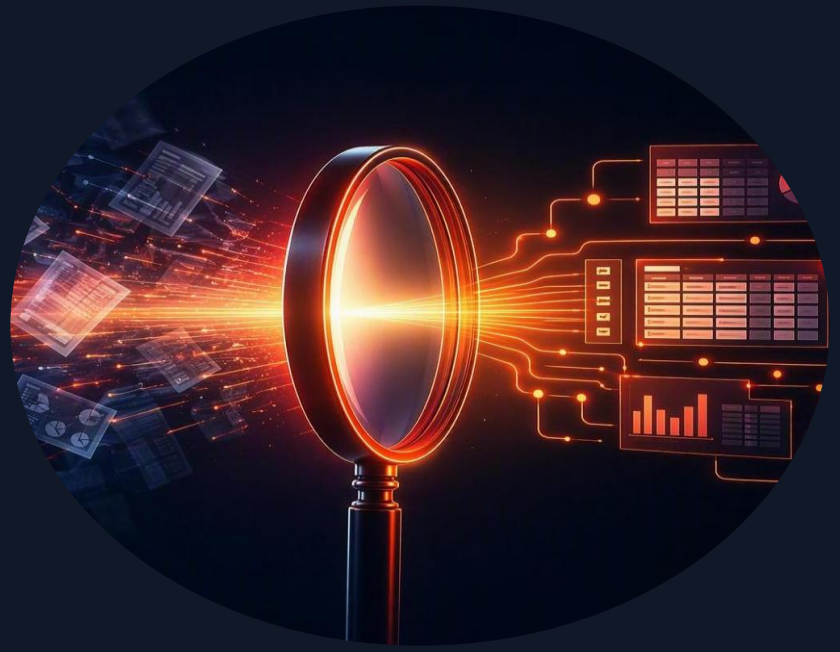
When AI Can See Your Data, Everything Changes.

When your documents live in SharePoint, Copilot can read, search, and reason across all of them. That's **line of sight** — and it turns AI from a general tool into your firm's superpower.

YOUR DATA TODAY

Trial balances
VAT returns
Engagement letters
Audit working papers
Client emails
Tax computations
Payroll records

COPILOT GETS LINE OF SIGHT



THE SUPERPOWER

Instant answers
Pattern recognition
Proactive insights
Automated drafts
Risk detection
Client-ready reports

Structure your data in SharePoint → Copilot gains line of sight → Your firm unlocks the superpower

Four foundations turn AI ambition into sustainable value

Guardrails and behaviours create usable knowledge; usable knowledge enables outcomes.



4 VALUE

Usage • time saved • quality • outcomes • success stories

3 LINE OF SIGHT

Captured knowledge • SharePoint • Teams channels • organised data

2 ADOPTION

Copilot for everyday work • champions • shared best practice

1 GOVERNANCE

Training • approved tools • policy • human judgement

Microsoft 365 - The T-Tech Spine

T-TECH

24/7 MANAGED SECURITY SERVICE

Document Management & Workflow

DOCUMENT MANAGEMENT SYSTEM

To Do

Planner

Power BI
Dashboards & Reporting

PRACTICE GATEWAY

KYC | AML | LoE

Companies House | HMRC | Download on the App Store | Google play

Tax Automation

SATR | CT | US Tax | Filing | Doc. Reading

PRACTICE GATEWAY | blueJ

Microsoft

Practice Management

OneDrive

Power Apps | Loop | Fabric | Viva | Copilots

Intranet

Training Stream

IRIS

All infrastructure moves to Microsoft Azure

Relevant apps connected to M365 spine

silverfin | inflo | caseware | GOCARDLESS | ignition | Syft | myworkpapers | Tax Systems | join | float | Workflow MAX | brightpay | spotlight reporting | xero | qb | Dext | sage | fyi | KARBON | HubSpot

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Overview

IT Support for Accountants

Business Consultancy

Technical Consultancy

AI & Automation

Practice Gateway

Modern Workplace

Security

Established
2010
100 employees

Member of Tech Board

MSP INNOVATION AWARDS 2019, 2020 & 2023 WINNER

Industry Specialist for Accountancy

computing Best Automation Project

NTA National Technology Awards 2020 WINNER

IT COMPANIES 50 BEST MANAGED

Channel Futures. European Partners 51 WINNER

IT EUROPA Innovating Managed Service Solution of the Year 2021

2019, 2020, & 2021 Winners

MSP 501 Channel Futures.

NEXT STEPS

Questions

Simply scan the QR code and fill in the form and one of our experts will be in touch to discuss your requirements in more detail.



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