

Manage Meetings and Collaboration

Run a project check-in from invite to shared knowledge hub.

~30 MIN · Outlook · Teams · Copilot Chat · Pages · Notebooks

Scenario. You lead **Project Lighthouse**, the launch of a customer portal at **Palm Bay Logistics**. Design is complete, but the privacy-terms legal review is blocking go-live. You will run a 15-minute check-in and turn it into follow-ups and a shared hub.

OBJECTIVES

By the end of this workshop you will be able to:

- Draft and schedule a meeting invite with **Copilot in Outlook**.
- Capture a live meeting and recap it with **Copilot in Teams**.
- Write a follow-up grounded in the meeting using **Copilot Chat**.
- Centralize decisions with **Copilot Pages** and **Notebooks**.

BEFORE YOU START

- Microsoft 365 account with a Copilot license; access to Outlook, Teams and the Microsoft Copilot app.
- Work alone (you are the only attendee) or with a classmate.

Important: Copilot in Teams needs **recording or transcription** to be on. Without it, Copilot can only use meeting chat. After the meeting, the recap can take a few minutes to appear.

YOUR TASKS

1 Prepare the meeting

Where: Outlook > **Copilot** icon (opens the Copilot pane).

1. Switch the mode to **Allow actions** so Copilot can create the event.
2. Send Prompt A (use a time one hour from now). Approve the event Copilot proposes.
3. Open your calendar and confirm the invite exists with the agenda.

PROMPT A

Draft a Teams meeting invite for a 15-minute Project Lighthouse check-in today at [time]. Agenda: progress updates, blockers and next steps.

Checkpoint: The event is on your calendar with a Teams link and three agenda items.

2 Capture the live meeting

Where: Teams > meeting window > **Copilot** icon in the toolbar.

1. Join the meeting. Open **More** and start **Recording** or **Transcription**.
2. Say the sample update below out loud (about 30 seconds).
3. Click **Copilot** and ask Prompt B, then Prompt C. End the meeting.

SAMPLE UPDATE TO SAY ALOUD

The customer portal design is finished. We are blocked on the legal review of the privacy terms. Omar will follow up with the legal team on Thursday.

PROMPT B

What are the key takeaways so far?

PROMPT C

Which blockers were mentioned, and who owns them?

Checkpoint: Copilot mentions the legal-review blocker and Omar.

3 Review the AI recap

Where: Teams > Calendar > open the finished meeting > **Recap** tab.

1. Open the **Recap** tab and select **AI summary**.
2. Read the notes and the suggested follow-up tasks.

Checkpoint: The AI summary lists the blocker and at least one follow-up task.

4 Draft the follow-up email

Where: Microsoft Copilot app > **Chat**.

1. Open Copilot Chat. Type **/** and select your Project Lighthouse check-in meeting.
2. Send Prompt D, then convert the tasks into a table with Prompt E.

PROMPT D

Draft a follow-up email for the Project Lighthouse team summarizing /Project Lighthouse Check-In. Include the blocker and list follow-up tasks with owners and due dates.

PROMPT E

Turn the follow-up tasks into a table with the columns Task, Owner and Due date.

Checkpoint: You have an email draft with a task table.

5 Build a shared project hub

Where: Copilot Chat > ... menu under a response > **Edit in Pages**.

1. Select **Edit in Pages** under Copilot's latest response.
2. Send Prompt F in the Pages editor.
3. Check that the legal-review blocker appears in the risks section. Find your page under **Library > Pages**.

PROMPT F

Turn this into a collaborative Project Lighthouse hub with sections for objectives, key milestones, team roles and risks.

Checkpoint: Your page has all four sections and lists the blocker as a risk.

6 Centralize knowledge

Where: Microsoft Copilot app > **Notebooks** > create a new notebook.

1. Name it **Project Lighthouse Notebook**.
2. Add references: the meeting, your page and any file from an earlier workshop (up to 100 allowed).
3. Send Prompt G. Optional: generate an **audio overview** or **Share** the notebook with a classmate.

PROMPT G

Summarize the current blockers and next steps for Project Lighthouse based on these references.

Checkpoint: The answer cites your references and matches your meeting.

FINAL CHECKLIST

- You can explain when to use **Chat** (ideas), **Pages** (shared hub) and **Notebooks** (all project knowledge).
- Recording or transcription was on during the meeting.
- You reviewed every Copilot-generated summary against what was actually said.

REFLECT

What did the AI recap miss or get wrong? Which output would you not send without editing?