

CREATE **Beginner** 10 MIN · UPDATED 2026-10-01

Apply your brand kit to a workbook automatically.

Let Copilot's brand kit skill format a workbook to your organization's branding in one pass instead of manually matching colors and fonts.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

On-brand workbooks and dashboards without a manual formatting pass every time.

Workflow Steps

Step 1: Confirm the brand kit is set up for your organization

Excel

Ask your Microsoft 365 admin (or check Copilot's brand kit settings yourself, if you have access) whether the organization's colors, fonts, and logo are actually configured.

The skill applies whatever's registered there and nothing more, so an empty or partial kit produces a half-formatted workbook that looks like a bug rather than a missing setup step.

Step 2: Ask Copilot to apply the brand kit

Copilot in Excel

Open the workbook, select the sheet or range you want formatted, and ask Copilot in the task pane to apply the organization's brand kit — be clear about scope ("this dashboard tab" vs. "the whole workbook") since it will otherwise reformat every sheet it can see, including ones you didn't mean to touch.

Step 3: Review the result against your brand guidelines

Excel

Open your actual brand guidelines document side by side and check headers, chart colors, and logo placement against it specifically – don't just eyeball whether it "looks branded."

The kit covers the colors and fonts it knows about, but a specific layout rule (logo must sit top-left, a minimum chart title size) can still slip through.

Step 4: Save it as a starting template for similar workbooks

Excel

Once the format is right, go to File > Save as Template (.xltx) rather than just saving the workbook itself – the next person building something similar starts from an already-branded file instead of re-running the brand kit skill from scratch every time.

✓ Check the work

- Colors, fonts, and logo placement match the organization's actual brand guidelines.
- Chart elements (gridlines, data labels) remain readable after the brand formatting is applied.
- The formatted workbook is saved as a reusable template, not a one-off.

Expected Outcome

A workbook reformatted to match the organization's brand colors, fonts, and logo placement automatically.

Want help rolling this out across your team? **Go to Liminals.Tech** ■