

CREATE **Intermediate** 30 MIN · UPDATED 2026-09-30

Build an executive briefing.

Create a weekly digest from multiple data sources.

MICROSOFT 365

Word

SharePoint

WORKS WITH

Claude

Copilot

Business Outcome

A polished briefing document.

Workflow Steps

Step 1: Draft the briefing

SharePoint

Write down the exact reporting period (e.g., "week ending Oct 3") first, then gather only the already-approved sources for that window — the weekly metrics report, project status pages, and any decision log — from their SharePoint libraries.

Pulling in a source that covers a different or overlapping period is the most common way a briefing ends up with a number that doesn't match what leadership saw last week.

Step 2: Extract the signal

Copilot

Claude

If the source documents live in SharePoint or OneDrive, reference them directly from Copilot so it reads the actual files; if you're using Claude instead, paste in the approved material directly rather than summarizing it yourself first — let the AI work from the primary sources, not your own paraphrase of them, so nothing gets lost or distorted a second time before the real draft happens.

****Prompt:****

> Create a concise executive briefing for the reporting period provided. Separate confirmed results, risks, decisions needed, and next steps. Keep all figures and dates exactly as stated in the sources, and flag any gaps instead of filling them in.

Step 3: Verify each claim

Word

Go line by line through the draft and trace every metric, date, owner name, and decision back to the specific source document it came from.

Not a general sense that "this sounds right." Delete anything you can't trace, and clearly mark any figure that's an estimate rather than a confirmed number ("approx." or a footnote), since an executive reader will treat every number in the briefing as fact unless told otherwise.

Step 4: Format and publish

Word and SharePoint

Use Word's built-in Heading styles for the summary, key metrics, risks, and requested-decisions sections — not manual bold-and-larger-font — so the document has a working navigation pane and stays easy to scan if it grows.

Save it to the team's standard SharePoint briefing location (not a personal OneDrive folder) and link back to each source document, so a reader who wants to dig into a number can go straight to it.

 ✓ Check the work

- Confirm the briefing uses the agreed reporting period.
- Reconcile each number with its source.
- Verify owners and dates for all listed next steps.
- Check SharePoint access before sharing the document.

Expected Outcome

A Word document stored on SharePoint.

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