

MEET **Advanced** 60 MIN · UPDATED 2026-09-30

Compile a board meeting briefing from scattered documents.

Delegate the assembly of a full board briefing packet – documents, action items and financial summaries – to Copilot Cowork.

MICROSOFT 365

Word

PowerPoint

WORKS WITH

Copilot Cowork

Business Outcome

Board prep drops from a multi-day cross-team scramble to a single reviewed packet, freeing the exec team to focus on the narrative instead of assembly.

Workflow Steps

Step 1: Brief Copilot Cowork on the packet you need

Copilot Cowork

Give Cowork the full brief: which documents to pull from, the standard board packet structure your company uses, and the meeting date it needs to be ready for.

PROMPT

Assemble this quarter's board briefing packet. Pull the latest financial summary, outstanding action items from the last board meeting, and updates from each department's status doc. Structure it as a narrative Word document with a supporting slide summary, following our standard board packet format.

Step 2: Let Cowork run unattended

Copilot Cowork

Cowork works through the source documents end-to-end and produces a complete draft rather than a partial outline – check back once it reports the packet is ready.

Step 3: Have the finance and legal owners fact-check their sections

Word and PowerPoint

Route the financial summary and any legal or compliance language to the people who own those numbers for direct verification – don't let a single reviewer sign off on the whole packet alone.

Step 4: Reconcile the action item log against the last board meeting's minutes

Word

Open the prior meeting's actual minutes side by side with the drafted action item log and check each item individually – owner still correct, status still accurate.

Rather than trusting that Cowork carried every item forward properly; an item quietly closed since the last meeting showing as still-open is the kind of small error a board will notice immediately.

Step 5: Finalize and distribute

Word and PowerPoint

Once every section is verified, convert to the board's standard distribution format and send it out on the usual pre-board timeline.

✓ Check the work

- Verify every financial figure against its source system, not just against the prior packet.
- Confirm action item status was checked with the actual owner, not inferred from the source doc's age.
- Check that nothing in the packet references a document version that's since been superseded.



Expected Outcome

A complete board briefing packet – narrative document plus supporting deck – ready for executive review before the board sees it.

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