

MEET **Beginner** 15 MIN · UPDATED 2026-09-30

Prepare for an executive meeting.

Synthesize long reports and email threads into a concise 1-pager.

MICROSOFT 365

Word

Outlook

WORKS WITH

Copilot

Claude

Business Outcome

A clear executive summary covering past decisions, current roadblocks, and required approvals.

Workflow Steps

Step 1: Gather context

Outlook

Open the relevant thread in Outlook and either export it as a PDF (File > Save As > PDF, from the print view) or select and copy the full text, including earlier replies further down the thread – not just the most recent message, which usually only has part of the full back-and-forth.

Step 2: Synthesize

Copilot

Claude

If Microsoft 365 Copilot is licensed, paste the thread directly into Copilot Chat so it has the full context in one pass; otherwise paste the same text into Claude. Either way, give it the complete thread rather than your own summary of it – a secondhand paraphrase is exactly where a decision or an approval request can quietly drop out.

****Prompt:****

> Summarize this email thread for an executive meeting. What are the 3 main decisions already made? What are the 2 pending approvals needed?

Step 3: Draft the one-page brief

Word

In Word, organize the output into decisions already made, current roadblocks, approvals needed, and the owner of each follow-up. Keep the brief to one page.

Step 4: Check against the sources

Word

Put the original thread and the draft brief side by side and go through every bullet – names, dates, who committed to what, and the stated approval status – correcting anything that drifted and deleting any claim the source doesn't actually back up.

This is the step that turns a plausible-sounding summary into one you can defend in the room.

Step 5: Share the meeting brief

Word and Outlook

Save the final document in the agreed location and send the link to attendees before the meeting.



✔ Check the work

- Confirm each decision and approval request is traceable to the source.
- Make unresolved or conflicting information explicit.
- Verify the brief fits on one page and is shared with the right attendees.

Expected Outcome

A 1-page Word document with bulleted key points.

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