

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

Run a structured business review meeting.

Organize the agenda, supporting materials and follow-through for a recurring business review with Copilot's help.

MICROSOFT 365

Teams

PowerPoint

WORKS WITH

Copilot

Business Outcome

Recurring business reviews run on a consistent structure, so attendees compare progress period over period instead of reacting to a new format each time.

Workflow Steps

Step 1: Pull last cycle's review materials

PowerPoint

Open the prior business review's deck, the action-item tracker, and this cycle's updated metrics export side by side — building from the same section order and slide structure every cycle is what lets attendees compare progress period over period instead of relearning a new format each time.

Step 2: Ask Copilot to draft this cycle's agenda and carry-forward items

Copilot

PROMPT

Using last cycle's business review deck and this cycle's updated metrics, draft the agenda for this review. Carry forward any open action items from last time that are still unresolved, and flag metrics that moved more than 10% since the last review.

Step 3: Verify the flagged metric moves

PowerPoint

Check any metric the AI flagged as a significant move against the underlying data source — a 10% swing might be a real trend or a data refresh artifact.

Step 4: Confirm carried-forward items are still actually open

Teams

Cross-check each carried-forward action item with its owner before including it — some may have already closed since the last review.

Step 5: Finalize the deck and share ahead of the meeting

PowerPoint and Teams

Build the confirmed agenda and metrics into the review deck, then share it in the Teams channel with enough lead time for attendees to review beforehand.

✓ Check the work

- Verify every flagged metric move against the source system, not just the prior deck.
- Confirm carried-forward action items with their actual owners before restating them as still open.
- Check the agenda structure matches what attendees expect from a recurring review, not a one-off format.

Expected Outcome

A ready-to-run business review agenda and deck built on last cycle's structure, with follow-through items carried forward.

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