

Automate meeting setup with Copilot Cowork.

Build a Copilot Cowork workflow to retrieve emails, files, and previous meeting notes to create summary documents, draft agendas, and block preparation schedules.

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45 minutes for each important meeting.

You have a meeting with a client tomorrow. So you spend 15 minutes searching Outlook for the latest email thread. Another 10 minutes scouring Teams for the project progress conversation. Then another 10 minutes looking for the proposal document your colleague shared last week. Finally, 10 minutes compiling it all into a coherent summary. That's 45 minutes – and you haven't even started thinking about what you'll say in the meeting.

Cowork does this in just about 3 minutes.

By the end of this lesson, you will have a meeting preparation process that creates a summary document, drafts the meeting agenda, and blocks the preparation schedule from a single prompt.

Meeting preparation process

Here's the complete prompt to try in Copilot Chat. Choose an actual meeting from your calendar this week:

Tôi có m?t cu?c h?p v?i [tên ng??i/nhóm] vào [ngày] v? [ch? ??]. Hãy chu? n b? cho tôi b?ng cách th?c hi?n nh?ng ?i?u sau: 1. Tìm t?t c? các chu? i email gi?a tôi và [tên ng??i/nhóm] trong 2 tu?n qua liên quan ??n [ch? ??] 2. L?y b?t k? file ho?c tài li?u ???c chia s? nào liên quan ??n d? án này t? OneDrive và SharePoint 3. Tóm t?t các ?i?m th?o lu?n chính t? cu ?c h?p Teams g?n ?ây nh?t c?a chúng tôi 4. T?o m?t tài li?u tóm t?t bao g? m: - Tóm t?t b?i c?nh (2-3 ?o?n) - Các câu h?i chính c?n gi?i quy?t - B?t k ? cam k?t nào ???c ??a ra b?i c? hai bên - Các ?i?m d? li?u ho?c s? li? u liên quan 5. So?n th?o ch??ng trình cu?c h?p v?i phân b? th? i gian 6. Dành 15 phút trên l?ch tr??c cu?c h?p ?? chu?n b?

What happens next : Cowork will turn this into a multi-step process. You'll see it start gathering information from your emails, Teams history, and file storage. At checkpoints, it will show you what it has found and ask if you want to adjust the scope.

? **Quick check** : How many M365 data sources does this workflow use?

Answer : At least 4 – Outlook, Teams, OneDrive/SharePoint, and Calendar.

Adjust the prompt for better results.

The prompt works well, but you'll get more accurate results with a few adjustments. Here's what needs adjusting:

Add context for the reader:

B?n tóm tắt ch? dành cho tôi - s? d?ng g?ch ??u đồng, b? qua các th? t?c r ??m rà, t?p trung vào nh?ng gì tôi c?n bi?t và nh?ng gì tôi c?n quy?t ??nh.

With:

B?n tóm tắt s? ???c chia s? v?i nhóm ?i?u hành. S? d?ng gi?ng v?n chuyên nghi?p, bao g?m trích d?n ngu?n và c?u trúc nó v?i các tiêu ?? ph?n rõ ràng.

Cowork adjusts the output format based on the reader. Privately prepared documents are concise and informal. Briefs for stakeholders are more polished.

Add a time limit:

If your project has been running for months, an unlimited search will generate too much noise. Add this instead:

Ch? t?p trung vào các thông tin liên l?c và file t? 2 tu?n g?n ?ây. B? qua b?t c? th? gì tr??c ngày 1 tháng 3.

Specify what needs to be excluded:

B? qua b?t k? thông tin liên l?c n?i b? nào c?a b? ph?n Nhân s?. Ch? bao g?m các lu?ng thông tin liên quan ??n d? án.

This helps prevent sensitive or irrelevant content from appearing in your summary.

? **Quick Check** : List two improvements that would enhance the quality of meeting preparation.

Answer : Time constraints and the context of the attendees are the most influential factors.

Verify your workflow results.

Cowork will generate your documentation package, but you need to verify it before using it. Here is your checklist:

Check	Things to note
Accuracy	Are the names, dates, and commitments accurate? Please compare this information with any specific statements.
Complete	Could it be missing any important conversations? If an important conversation takes place in a Teams channel that Cowork isn't searching for, it won't show up.

Check	Things to note
Relevance	Is everything in the summary actually relevant to this meeting? Sometimes outdated or irrelevant information can still slip through.
Sensitivity	Does the summary contain any content that shouldn't be shared? Cowork respects your M365 access rights, but please double-check if you intend to forward it.

Common problem : Cowork sometimes assigns the wrong recipient to comments in a long email thread. Always verify specific quotes and commitments directly before the meeting.

Try it yourself!

Select the most important meeting this week and run the entire meeting preparation process. Here's a simplified version:

Chu?n b? cho t?i cu?c h?p [ng?y] v?i [t?n/nh?m] v? [ch? ??]. L? y c?c email li?n quan t? 2 tu?n g?n ??y, t?m t?t c?c cu?c tr? chuy?n g?n ? ?y c?a ch?ng ta tr?n Teams v? ch? ?? ? ?y, t?m c?c file li?n quan trong OneDrive, v? t?o m?t t?i li?u t?m t?t v? i nh?ng ?i?m ch?nh, c?u h?i m? v? m?t ch??ng tr?nh ngh? s? d? th? o. D?nh 15 ph?t tr??c cu?c h?p ?? chu?n b?.

After Cobone is completed:

1. Test the accuracy of the summary against your memory of recent conversations.
2. Verify that the agenda includes the correct topics.
3. Confirm that the calendar block has been created.
4. If anything goes wrong, let Cowork know what needs fixing – it will adjust itself.

Compare the times:

1. Manual meeting preparation time: 30-45 minutes.
2. Cowork: 3 minutes to create + 5 minutes for your review = approximately 8 minutes total.

Key points to remember

1. Prepare for team meetings by integrating information from Outlook, Teams, OneDrive/SharePoint, and Calendar into a single workflow.
2. Time constraints and participant context are two of the most impactful factors in refining the prompt.
3. Always verify names, commitments, and credited statements before sharing.
4. Blocking the preparation schedule ensures you actually read the summary before entering the room.
5. Manual work: 30-45 minutes. Cowork: Approximately 8 minutes, including review.

1. Question 1:

After Cowork creates the meeting preparation package, what is the most important step before sending it to attendees?

1. A. Rerun the workflow for thorough testing - a common misunderstanding that leads to suboptimal results.
2. B. Review the output to ensure accuracy, especially any statistics, names, or commitments assigned to specific individuals.
3. C. Share immediately to save time.

EXPLAIN:

AI can confidently and subtly spread misinformation – a misassigned comment, a date taken from the wrong stream. Always review your output before sharing, especially anything involving people's names and commitments.

2. Question 2:

You're running a meeting preparation process and the summary document includes outdated information from a project that finished last month. What should you do?

1. A. Delete the workflow and start again.
2. B. Report the bug to Microsoft
3. C. Add a time filter to your prompt, for example, 'include only emails and files from the last 2 weeks'.
4. D. Accepting and manually editing documents - a frequent misunderstanding leading to suboptimal results.

EXPLAIN:

Time filters help Cowork focus on relevant data. Adding constraints like 'the last 2 weeks' or 'since March 1st' will narrow the scope of context and prevent outdated information from cluttering your summary.

3. Question 3:

Why does Cowork help prepare for meetings better than a simple prompt like "summarize my email"?

1. A. It uses a faster internet connection.
2. B. It searches for background information across the entire web – in very specific conditions, this might be applicable, but as a general guideline, it's not effective.
3. C. It only works with meeting invitations, nothing else.
4. D. It integrates Outlook, Teams, OneDrive, and Calendar into a single package, connecting context that prompts from individual applications miss.

EXPLAIN:

Prompts from individual applications miss connections. Cowork pulls email threads, Teams messages, shared files, and history into a single workflow, giving you context that no other application can provide.

Submit your work

Training results

You have completed **0** questions.

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Review the lesson

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