

WEBINAR BRIEFING | 20 NOVEMBER 2026

What's new with your M365 Copilot licence

This briefing covers the key points from our recent webinar, with practical tips and examples to try. It covers features included with M365 Copilot Premium (add-on licence), not tools with extra usage-based charges such as Cowork.

Key points

01 Presentations using your template

PowerPoint has improved a great deal. The key is setup: your slide master, examples of what good looks like, and a brand kit.

02 Meeting notes in your format

You can now customise how Copilot creates meeting notes. Set up different templates for internal, client and board meetings.

03 Skills in Excel

Skills are repeatable instructions. Set them up once, then reuse them. Try Microsoft's built-in Skills or record your own.

04 Three features you might have missed

Personalisation, Microsoft's specialist agents and scheduled prompts can all improve performance and speed up tasks.

TIP: Invest in Copilot champions who own different elements of setup.

Three things to try today

1

Set up one custom summary

Create a summary template for the meeting you have most often. See page 3.

2

Try the dashboard Skill

Run @interactive-canvas on one of your own Excel data sets. See page 4.

3

Personalise Copilot

Add custom instructions, such as UK English and short answers. See page 5.

Dandelion
Applied AI



Caroline Broadway, Director, Dandelion Applied AI | dandelionai.co.uk

01 Presentations using your template

PowerPoint was traditionally a weakness for Copilot, producing quite generic slides. It can now produce first drafts using your template. But Copilot is a much better assistant than it is a designer, so the key is setup.

The key is setup

Three ways to get started:

1. **Slide master.** Check your colours are a custom palette and your fonts are custom fonts. Then charts and diagrams match your template.
2. **Example slides.** Give Copilot examples of what good, or ideally best, looks like. Separate masters for proposals, reports and events help.
3. **Brand kit.** Upload it in Create in the Copilot app. Brand managers can share it with everyone.

TIP: No time to set up? Brief Copilot with examples of what good looks like.

How it works



From the demo: one of my standard case study slides, built from my brand kit. Copilot found the example for that slide type and followed the instructions for each area.

How to use it

1. Open the presentation in PowerPoint.
2. In the prompt box, click the add (+) menu and select your brand kit.
3. Give Copilot a brief for the layout, and use / to add the content.

Try it out

TRY THIS PROMPT:

Create a [5] slide presentation on [increasing fellow attendance] based on the attached document.

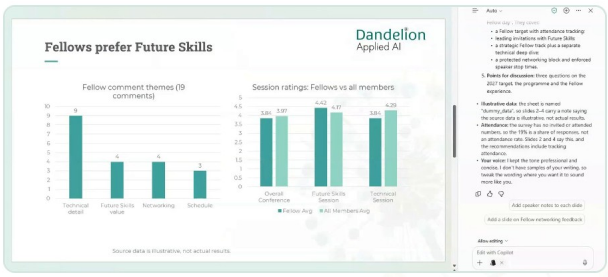
The objective of the presentation is [to share key learnings from the last conference].

The audience is [members of the leadership team].

Key points to include are [summary of key learnings and recommendations, illustrated with data].

Tone is [professional and concise, make it sound like me].

The presentation should [be engaging and use our layouts. The last slide should be suggested points for discussion].



From the demo: survey analysis in Excel turned into a first draft deck, with charts in my format and colours, and discussion points as the last slide.

02 Meeting notes in your format

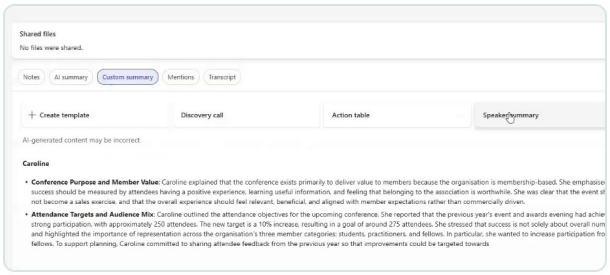
Meeting notes remain one of the most popular uses of Copilot. A really significant shift was the ability to customise how Copilot creates them for you.

Three meeting note options

1. **Meeting recap.** Transcribe the meeting, then get a recap afterwards in Teams chat. Use Microsoft's version or create your own. There's also an audio recap, covering up to 8 meetings.
2. **Facilitator agent.** Joins the meeting live, takes notes, keeps track of actions and tracks against your agenda. You can ask it questions as you go.
3. **Teams mobile app.** For in-person meetings. Speaker recognition labels Speaker 1 and Speaker 2, and you tell it who they were. Works well for small meetings.

TIP: Type / and the meeting name to use your notes in a report or proposal.

How it works



From the demo: the same meeting with my custom summaries, including a discovery call, an action table and Microsoft's speaker summary.

How to set up a custom summary

To generate the AI summary or custom summary you need to transcribe the meeting.

1. Afterwards, open View recap in the Teams chat.
2. Copilot automatically provides an AI summary.
3. For your own format, click Custom summary, then Create template.
4. Add the sample notes or a prompt, check the preview and once you're happy with it, save.

Set up different templates for internal meetings, client meetings and boards or trustees.

Try it out

TRY THIS PROMPT:

Create a summary of the project meeting in a table.

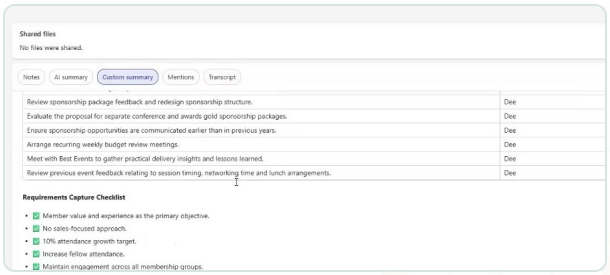
It should list out actions, owners, deadlines and notes.

Consolidate actions and put detail in notes.

For example: Sam to follow up with a training agenda.

Not: Sam to design training, Sam to contact client about training agenda.

If unclear on an action owner or point, highlight that section in bold and mark as needs review.



From the demo: a custom summary with consolidated actions in a table, followed by a requirements checklist.

03 Skills in Excel

Copilot in Excel has long been a major selling point. Rather than remembering how XLOOKUP or pivot tables work, you can ask in plain language. And because it builds formulas, its work is much easier to check.

Skills

Skills are repeatable instructions, which save time working with Copilot. You can use:

1. **Built-in Skills:** Microsoft has pre-built Skills you can use. Only use Skills from trusted sources, like Microsoft or a colleague.
2. **Build your own:** Record a Skill for a task you do regularly, so Copilot does it your way each time. See below.

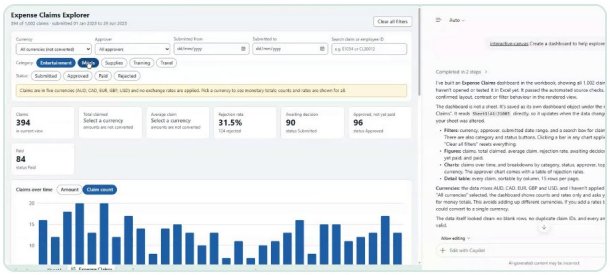
Always check the output, as Copilot can make mistakes.

Built-in Skills to try

@clean-data	Fixes inconsistent naming, formatting and duplicates
@theme-design	Styles your workbook using Excel design best practice
@interactive-canvas	Creates interactive dashboards and reports
@check-model	One of more than 10 finance Skills

TIP: Type @skill-name to use that Skill.

Using a pre-built Skill



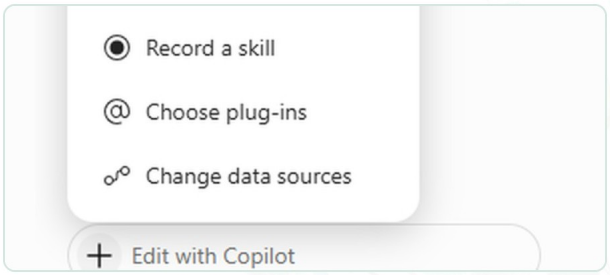
From the demo: 1,000 lines of dummy expenses data turned into an interactive dashboard. Click a category and the charts change.

How to use it

1. Open your workbook in Excel.
2. In the Copilot prompt box, click + then Plugins and skills.
3. Select interactive canvas and ask it to build a dashboard from your data.

Record your own Skill

1. In the Copilot prompt box, click + then Record a Skill.
2. Go through the task, using prompts you've already tried a few times.
3. At the end, tell it what changes each time, what to check and what can go wrong, then ask it to create the Skill.
4. Test it on different data sets to make sure it gives consistent results.



Click + in the Copilot prompt box in Excel to find Record a skill.

Ideas to try: analysing survey data to evaluate a programme, budget management and forecasting, or pulling out KPIs.

04 Three features you might have missed

These come up regularly in the organisations I work with. A few minutes spent on them can make quite a big difference to how Copilot performs.

Personalisation

The one thing you don't want is generic, average AI content. In the Copilot app, go to the three dots, then Settings, then Personalisation, and add custom instructions. This lets you tell Copilot how to act and your preferences.

You can also personalise:

- **Outlook:** ask Copilot to analyse your email writing style, then paste it into the settings.
- **Excel:** ask it to use the simplest formula possible, so it's easier to check.
- **Notebooks and projects:** give each its own instructions, for example to be really challenging on strategy work.

TIP: Use custom instructions to tell Copilot to use UK English and avoid em dashes.

Agents

Microsoft has prebuilt agents, or you can build your own. Find them in Agents, then More, and pin the ones you use. Microsoft's two specialist agents to try are:

1. **Researcher:** does complex, multi-step research across your files and online, then gives you a report.
2. **Analyst:** pulls out trends and insights across several files.

TRY THIS PROMPT WITH RESEARCHER:

Prepare me for my meeting with [customer name] on [date].

Use my emails, meetings, chats and files from the last three months, plus search online using their website and industry news.

Give me a one-page brief with: what they care about right now, open issues and commitments, recent company or industry news, and three questions I should ask. Provide your sources.

Scheduled prompts

Copilot can run a task for you automatically, by scheduling your prompt. In the Copilot app, either go to Tasks or hover over a prompt and click on the clock. You could:

- Get a brief every Friday on next week's meetings
- Flag meetings with no agenda or prep needed
- Summarise important unread emails each day
- Pull out your three highlights from the week



From the demo: scheduling a prompt to repeat every day.

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About Dandelion Applied AI

Since starting in 2024, we've trained hundreds of people. We most commonly train on Microsoft 365 Copilot. We also offer sessions on ChatGPT and Claude. Businesses often want to understand the strengths of each.

Our approach is:

- AI as a tool - an assistant, not a replacement for people
- Ethical and responsible use at the core of every session
- Training that is practical, interactive and engaging

"Dandelion Applied AI understood where our business was at and showed AI's potential in the team's work environment."

Darren Langdon, Managing Director, Mirius



Caroline Broadway, Director
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Interested in a session like this for your team? Get in touch.

This webinar briefing was produced by Claude using the webinar transcript and slide deck. It has been reviewed and checked by Caroline Broadway.

Correct as of November 2026. Copilot features and menus change regularly.