

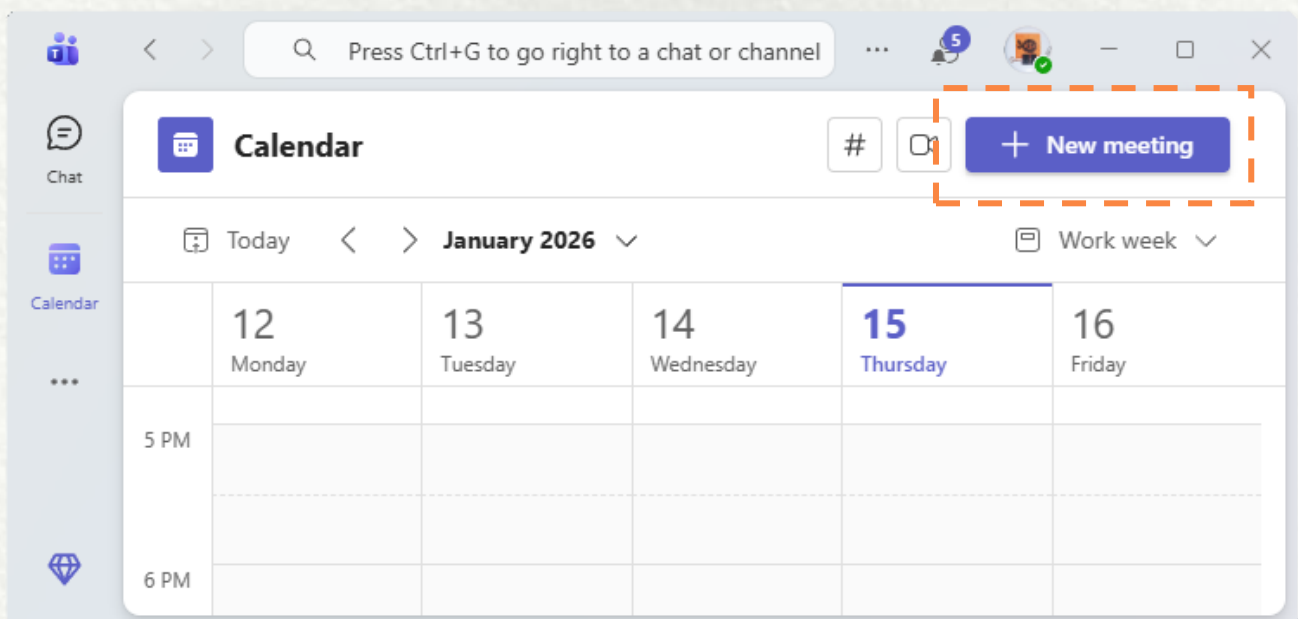
Mastering Microsoft Teams Meetings

→ Helping 'Teams' live up to its name



Microsoft Teams Meeting

1. Open your **Microsoft Teams app** (desktop or web).
2. Click on the **Calendar tab** on the left sidebar.
3. At the top right, click **New meeting**.
4. Fill in your meeting details (title, attendees, date, time, and description).
5. Once ready, click **Send**. Invites will be sent to all attendees.



Schedule a Meeting when

all participants are available

1. While creating your meeting, click the **Scheduling Assistant** tab.
2. **Review the availability** grid for all required attendees.
3. Drag your meeting time to a slot where **everyone is shown as available**.
4. Click **Send** to finalize the meeting at the chosen time.

Microsoft Teams

Event **Scheduling Assistant**

Options ▾

Send 1/19/2026 4:30 PM to 5:00 PM All day ☐

Monday, January 19, 2026

	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM
Required attendees									
Kline Potente Available									
Elena Kerrigan Available Monday 8:30 AM UTC+0					Pri	Grac	Lunc	MI	
Deane Marwa Available Monday 8:30 AM UTC+0					Di: Prep RV		Lunc		
J5 Jessica Scott Available Monday 8:30 AM UTC+0					Di: Work on ADHD eBook				
Francis Catalan Available									

Busy Tentative Out of office Unknown Working elsewhere Outside of working hours

Microsoft Loop Agenda:

How to Add and Amend

Before the meeting:

1. While setting up your meeting, go to the **'Add an Agenda'** box (located below the meeting details box). Fill in your agenda items, then send the invite.

Show as: Busy ▾ Category: None ▾ Time zone: (UTC +5:30) Indian Standard Time ▾ Response options ▾ Sensitivity: None

Marketing Sync

Attendees: Serena Davis (Free), Aadi Kapoor (Free), Babak Shammass (Free), Beth Davies (Free), Bruno Zhao (Free), Charlotte de Crum (Free). +Optional attendees

5/29/22 ▾ 10:00 AM ▾ → 5/29/22 ▾ 11:00 AM ▾ 30m ☐ All day

Does not repeat ▾

Add channel

Add location Online meeting ☒

B *I* U S B A Paragraph ▾ 99 ...

Add a description

Add an agenda everyone can edit

Make the most of your meeting

Anyone who's invited can edit the agenda, take notes, and capture tasks during the meeting.

[Learn more](#)

During the meeting:

1. access the Loop Agenda from the meeting **Chat or Notes** panel.
2. To amend, simply **click into the component and edit**. Changes are live for everyone.

Amending Teams Meetings Options:

Security

1. Find your scheduled meeting in the Teams calendar and click it.
2. Select **Meeting options** (there may be a link in the invite or toolbar).
3. **Adjust security settings** such as who can bypass the lobby & who can present.
4. Choose settings that best suit your needs (e.g., set the lobby so only invited users can bypass).
5. Click **Save** to apply your changes.

Meeting options

Meeting access

Roles

Production tools

Participation

Recording & transcription

Copilot and other AI

Meeting access

Who can bypass the lobby?
Even if Everyone is selected, your org policy may require certain participants wait in the lobby until a member of your org or a trusted org joins. This could include people joining without an account, people from untrusted orgs, and people dialing in.

People in my org and guests

People dialing in can bypass the lobby

Who can admit from the lobby

Organizers, co-organizers, and presenters

Show meeting info on join screen
Display details about the meeting like title and start time, number of others joined, and presence of the organizer.

Users allowed to by pass the lobby

Announce when people dialing in join or leave

Require unverified participants to verify their info before joining
When this is on, unverified participants will need to sign in or verify their emails with a code before joining the meeting. Your license and admin policy also determine how they'll join.

Amending Teams Meetings Options:

Audio & Video

1. Go to your meeting's **Meeting options**.
2. Locate options such as **Allow mic for attendees** or **Allow camera for attendees**.
3. **Use the toggles** to enable or disable microphones and cameras for participants.
4. **Save** your changes before the meeting starts.

Participation

☒ Recording & transcription

 Copilot and other AI

Participation

Allow mic for attendees

Turn this off to prevent attendees from unmuting. You can allow them to unmute individually as needed.



Allow camera for attendees

Turn this off to prevent attendees from sharing video. You can allow them to share video individually as needed.



Amending Teams Meetings Options:

Engagement

1. In Meeting options, scroll to **Participation** for engagement features like **Chat, Reactions, or Q&A**.
2. Switch these features **on or off** as needed for your meeting style.
3. Remember to **save your settings** so they apply when your meeting begins.

 **Participation**

☒ Recording & transcription

 Copilot and other AI

Meeting chat

On

▼

Q&A

Organizers can customize Q&A to allow anonymous posts, review questions before they are published, and more.

☐

Allow reactions

☒

Allow attendance report

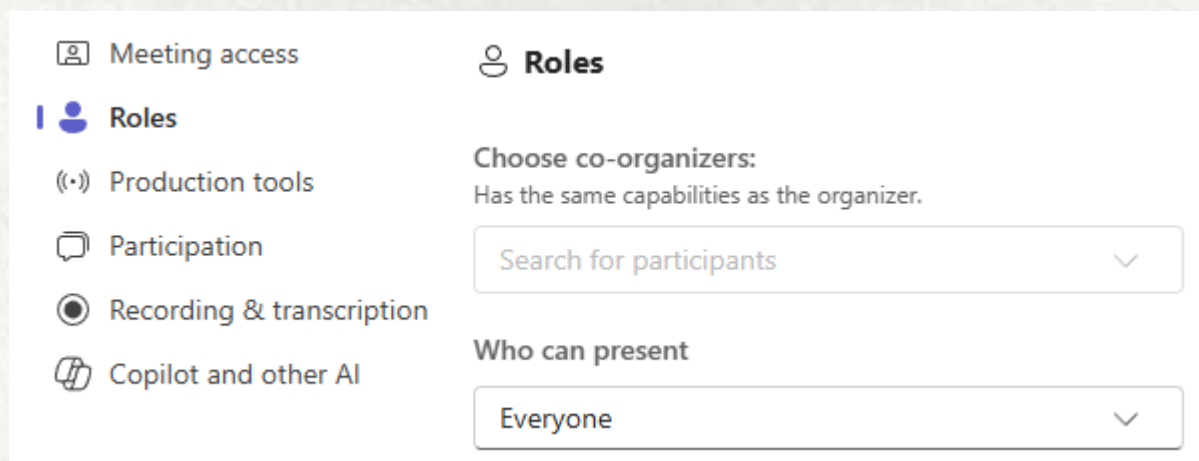
☒

Amending Teams Meetings Options:

Roles

Before the meeting:

1. Open your Teams calendar and **find your scheduled meeting**.
2. Click on the meeting, then select **Meeting options**.
3. Scroll down to **Roles** and use the dropdown to choose between **'Everyone', 'Specific people', or 'Only me'**.
4. Click **Save** to apply your changes.



The screenshot shows the 'Meeting options' window in Microsoft Teams. On the left, there is a sidebar with icons and labels: 'Meeting access', 'Roles' (selected with a blue bar), 'Production tools', 'Participation', 'Recording & transcription', and 'Copilot and other AI'. The main area is titled 'Roles' with a person icon. It contains the text 'Choose co-organizers: Has the same capabilities as the organizer.' followed by a search bar labeled 'Search for participants' with a dropdown arrow. Below this is the section 'Who can present' with a dropdown menu currently showing 'Everyone' and a dropdown arrow.

During the meeting:

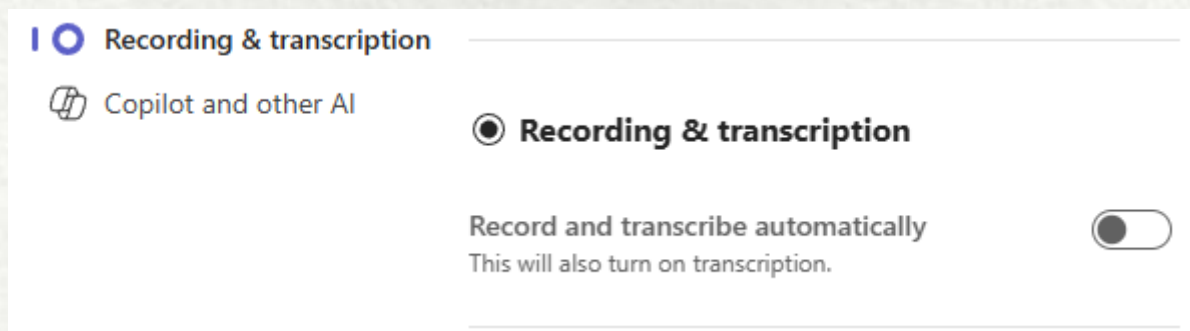
1. Click the **People icon** in the toolbar.
2. Hover over a **participant's name**.
3. Click the **three dots (More options)**, then select Make a presenter or Make an attendee.
4. This lets you give or remove sharing and management privileges instantly.

Amending Teams Meetings Options:

Recording & Transcript

Before the meeting:

1. Go to your **meeting invite** in the Teams calendar.
2. Click **Meeting options**.
3. Scroll down to **Recording and Transcription**: toggle them on if available.



During the meeting:

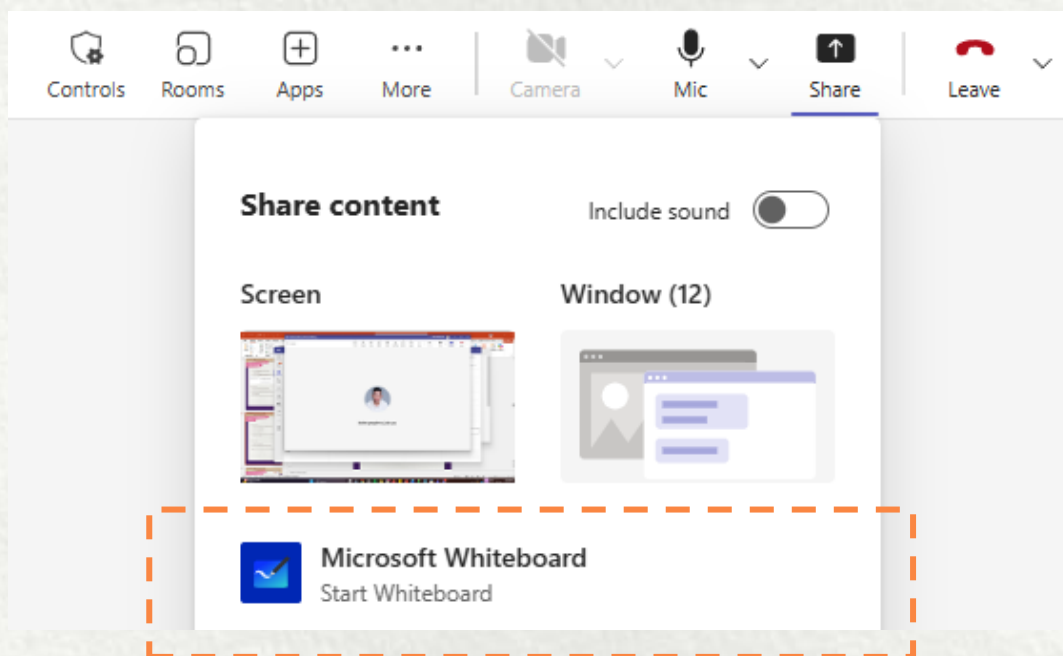
1. Click the three dots (More) in the meeting toolbar.
2. Select Start recording to begin capturing audio and video.
3. To enable transcript, select Start transcription (this option may appear once recording starts).
4. Stop recording or transcription at any time via the same menu.

Amending Teams Meetings Options:

Whiteboard

Before the meeting:

1. Add Microsoft Whiteboard to your meeting via the invite:
2. Open the Teams app and calendar.
3. Select your meeting, then Edit.
4. In the body of your invite, mention that you'll use Whiteboard, so participants come prepared.



During the meeting:

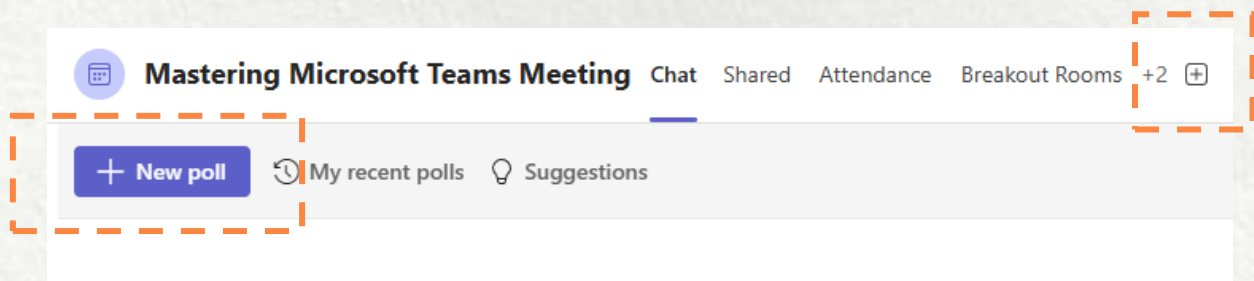
1. Click **Share** in the top toolbar.
2. **Select Microsoft Whiteboard** from the sharing options.
3. Once opened, everyone can draw, type, or add notes together in real-time.

Amending Teams Meetings Options:

Polls

Before the meeting:

1. Open your Teams meeting in the calendar.
2. Click the Polls tab (or find Forms in the meeting details). If the Polls tab isn't visible, **click the + (Add a tab)** icon at the top of the meeting, **search for "Polls,"** and add it to enable polling features.
3. Create your poll questions in advance, save them, and they'll be ready for launch in your meeting.



During the meeting:

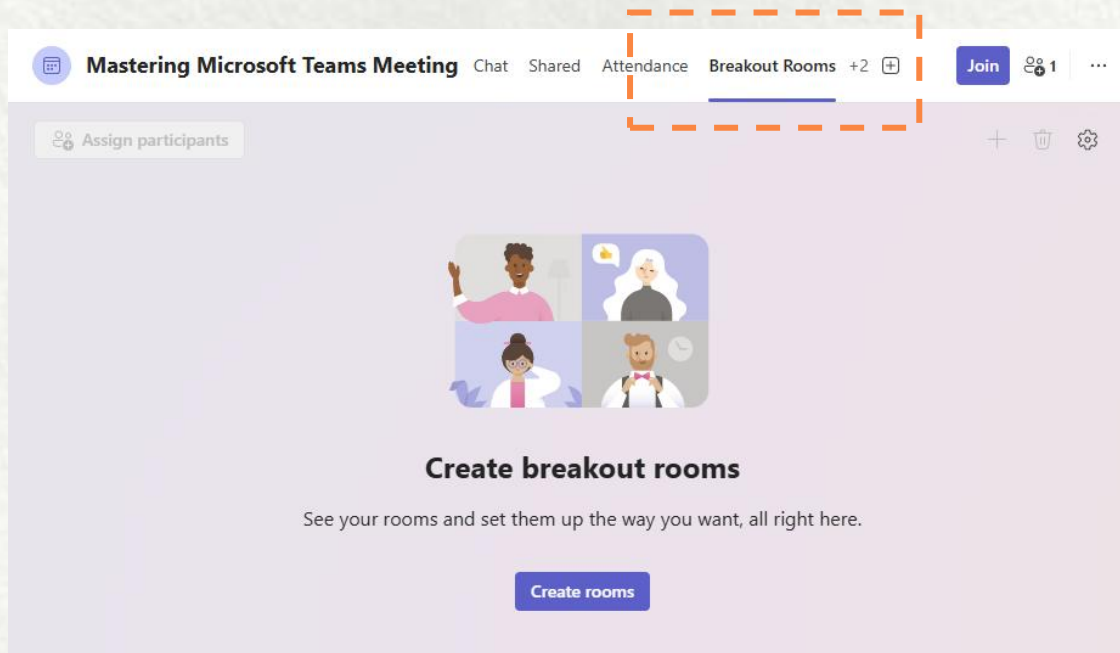
1. Click the **three dots (More)** in the meeting controls.
2. **Select Polls** from the menu.
3. **Create and launch a poll** instantly.
4. **View the results** in real time as participants respond.

Amending Teams Meetings Options:

Break-out Rooms

Before the meeting:

1. Schedule your meeting and **open its invite in the Teams calendar**.
2. **Click Breakout rooms** (may appear in the toolbar or as an option).
3. Create rooms, name them, and (if possible) pre-assign participants.



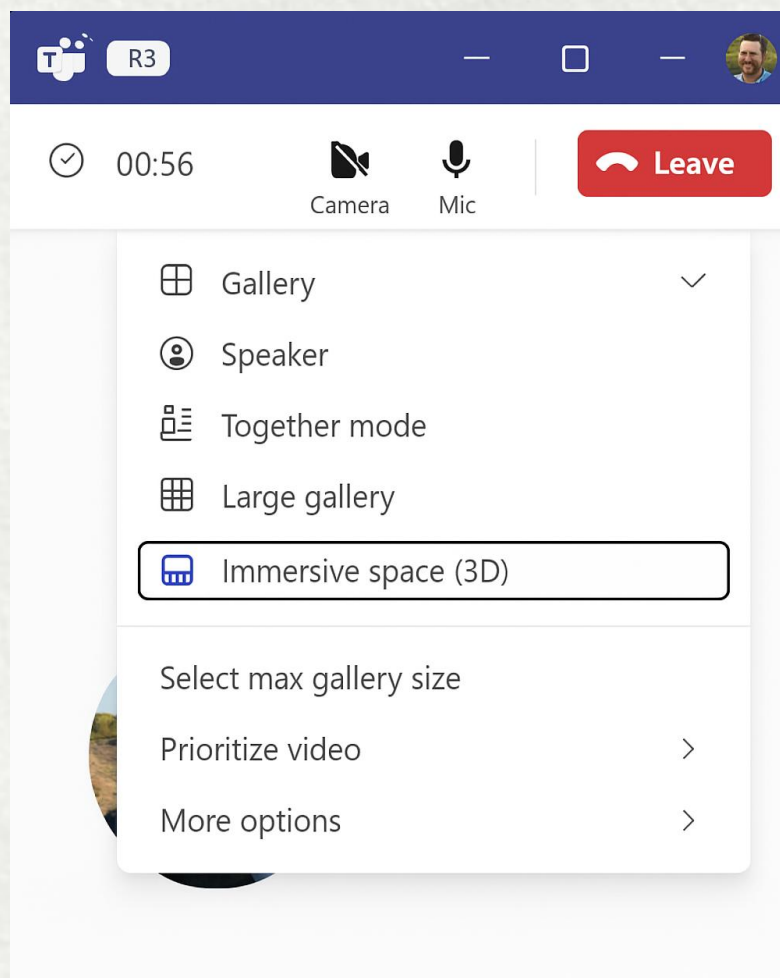
During the meeting:

1. Click the Breakout rooms icon in the meeting toolbar.
2. Create rooms as needed and assign participants manually or automatically.
3. Move people between

How participants can access the Immersive Space in a Microsoft Teams Meeting

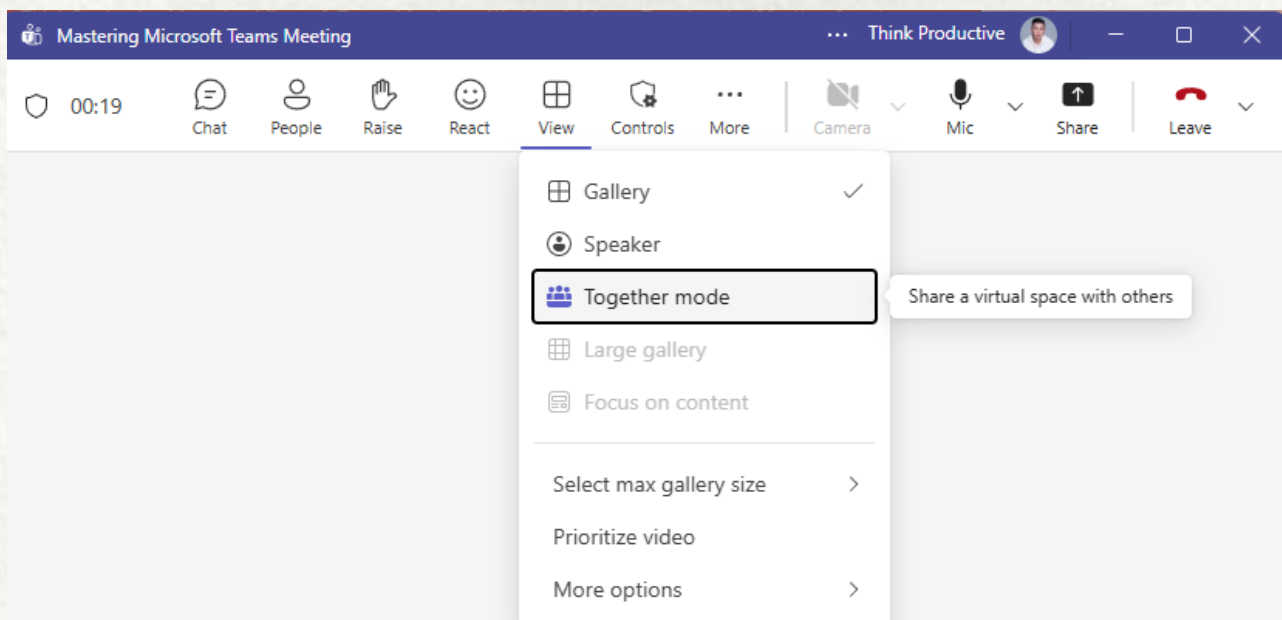
Look for the View menu in your meeting's top toolbar.

1. Select Immersive Space if available.
2. Follow the prompts to enter a more engaging, 3D-like environment with your colleagues.
3. If you don't see the option, check with your meeting organizer or IT admin for availability.



How participants can access Together Mode in a Microsoft Teams Meeting

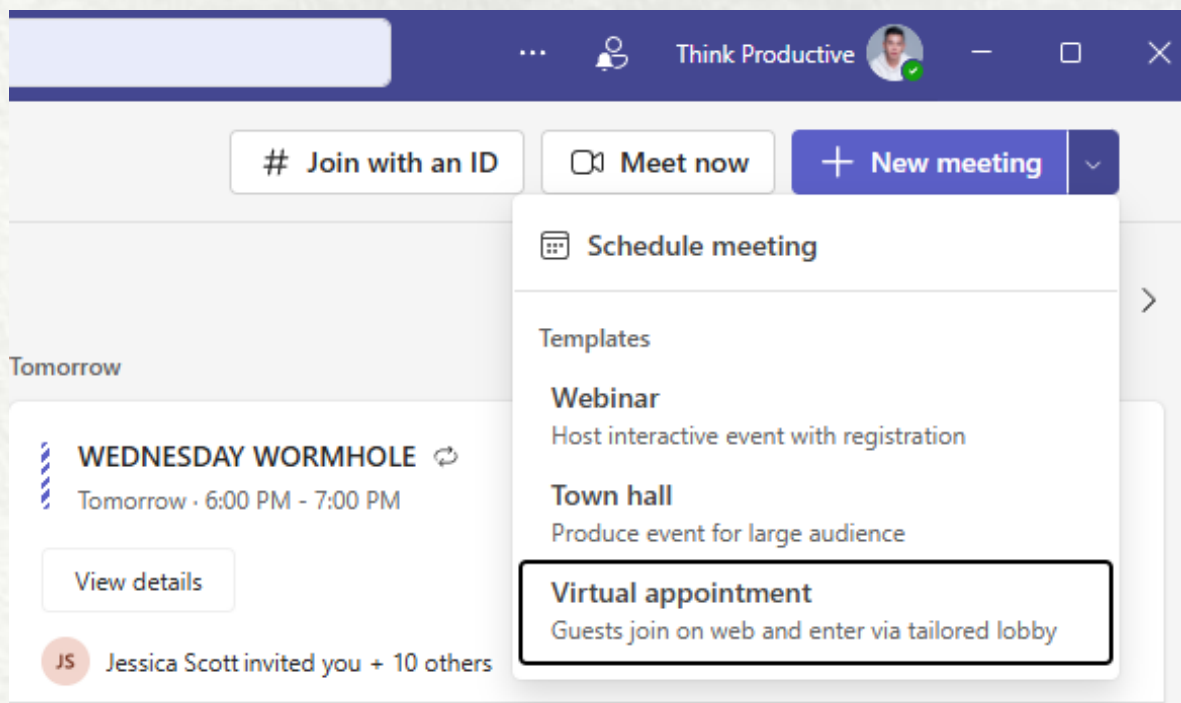
1. Click **View** in the meeting control bar.
2. Select **Together Mode** from the dropdown.
3. Pick your preferred scene (like 'auditorium' or 'café') and click Apply.
4. Everyone in the meeting will now appear together in the chosen background.



Alternative Meeting Types in Teams

How to set up alternative Microsoft Teams Meeting types (Webinars, Town Hall, Virtual Appointment)

1. In the Teams calendar:
2. Click the drop-down arrow next to New meeting at the top.
3. Choose Webinar, Town Hall, or Virtual Appointment.
4. Fill in event details, add required presenters or guests, set permissions, and add custom registration forms if needed (especially for webinars).
5. Send the invite as normal; attendees will receive the correct format and instructions.



What can standard Co-Pilot users do pre, during and post Microsoft Teams Meetings to help their productivity?

Before the meeting:

- ▶ Use Co-Pilot to draft the meeting agenda and prepare key questions or talking points.
- ▶ Summarize emails or documents related to the meeting for easy reference.

During the meeting:

- ▶ Activate Co-Pilot to take live notes and highlight important discussion points.
- ▶ Ask Co-Pilot for instant summaries or clarification on complex topics.

After the meeting:

- ▶ Let Co-Pilot generate a summary, list action items, & draft follow-up emails.
- ▶ Review Co-Pilot's notes to make sure you didn't miss anything important.

What can premium Co-Pilot users do pre, during and post Microsoft Teams Meetings to help their productivity?

Before the meeting:

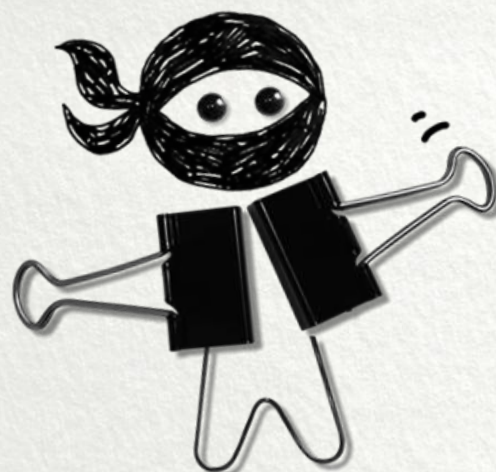
- ▶ Access AI-powered scheduling to find the best time for all participants.
- ▶ Generate rich agendas with suggested topics and relevant files.
- ▶ Use premium content insights to prepare data-driven questions.

During the meeting:

- ▶ Enable real-time transcripts for instant reference.
- ▶ Receive smart insights, suggested follow-up questions, and automatic action item tracking.

After the meeting:

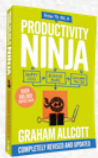
- ▶ Get comprehensive summaries, follow-up recommendations, and ready-to-send response drafts.
- ▶ Collaborate with Co-Pilot to prepare presentations or reports based on the meeting's outcome.



WHAT'S NEXT?



Head over to the Productivity Ninja Academy from today, where you'll find your slide deck and this workbook to help achieve your personal action plans. (You'll gain access as soon as you complete your Survey at the end of this Workshop).



Deep dive into Graham's "How to be a Productivity Ninja" book (your eCopy is waiting for you in the Academy).



Make time to to reflect on the workshop you attended. **Think about the key takeaways, insights, and ideas** that stood out to you.



Feel free to share and practice your fresh perspectives on balancing wellbeing with meaningful productivity in your daily work.



Last but not least, Remember to **track your progress and celebrate your successes** along the way. Don't be afraid to ask for help or support if you need it.



Find us on Social. We'll help keep you on the straight and narrow!

YOU'VE Got THIS!

THE THINK PRODUCTIVE TEAM!



**think
productive**
REIMAGINING WORK



Find Out More

**We can help your entire organization
transform work for the better.**

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