

Back to Basics: Best Microsoft 365 Tools for Effective meetings



UseIT at **SFS**

Agenda

1

Prepare your meeting

- Meeting options
- Collaborative notes

2

Engage participants

- Breakout rooms
- Polls
- Whiteboard

3

Technical setup in Teams (Live demo)

4

Best practices for effective meetings



Meeting option categories

Security

- Bypassing the lobby

Roles

- Co-organizers
- Presenting
- Interpretation

Participation

- Allow mic / camera
- Meeting chat
- Q&A
- Reactions
- Attendance report

Recording & transcription

Meeting options

Meeting access

Roles

Production tools

Participation

Recording & transcription

Copilot

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, trusted orgs, and guests

People dialing in can bypass the lobby

Who can admit from the lobby

Organizers, co-organizers, and presenters

Announce when people dialing in join or leave

Roles

Save

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Collaborative meeting notes



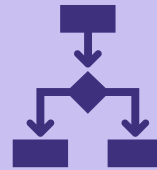
Ways to utilize Polls

✗ You cannot use meeting polls in channel meetings.

Collect feedback



Drive decisions



Gather information



Brainstorming



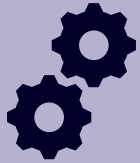
Break the ice



Test knowledge



Breakout rooms



Management

- Create **in advance or during** the meeting
- Appoint **Breakout Room Managers (if needed)**
- Possible to set **time-limit**



Participants

- Up to **300 participants and 50 rooms**
- Assign **automatically, manually or let them choose.**
- **Attendance reporting**



Interaction

- **Announcement** to all rooms
- **Separate chat** for each room.
- Separate **presenter rights**

Collect ideas quickly with Whiteboard



- Create new or **use existing whiteboards & templates**
- **Guide** collaboration experience
- **Comment and vote** ideas
- Insert and format text in **text boxes, notes, and shapes**
- **Add images, videos, and links** with rich preview
- Add and edit **Loop components**

Best practices for effective meetings

1

Set **clear objectives** and **prepare an agenda**

2

Have clear and predefined **roles** for co-organizers and participants.

3

Know and test your tools in advance and set up “Housekeeping rules”

4

Encourage **participation** e.g. hand-raising, chat, reactions & polls.

5

Utilize **co-authoring tools** such as Whiteboards & Excel Live.

6

Take **collective notes** even when recording and make use of Copilot

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