



Whiteboard

Collaborate Creatively in Real-Time

August Spotlight Session

Agenda



1. Using templates for faster setup.
2. Adding sticky notes, text, images and drawing tools for sketching ideas.
3. Organising your whiteboards with folders and naming conventions.
4. Exporting and sharing finished whiteboards with your team

Microsoft's Whiteboard app will help turn your ideas into action.

It is a collaborative canvas perfect for brainstorming, planning, and problem-solving.

Whiteboard's biggest time-savers



Whiteboard

Ideate and collaborate on a freeform canvas designed for pen, touch and...

Using Templates for Faster Setup

Templates

✦ Recommended

📁 My templates

👤 Shared with me

💡 Brainstorming

⚙️ Problem solving

🔍 Design and research

📈 Strategy

📅 Project planning

☁️ Retrospective

🏆 Games

🔑 Workshops

🧑🏫 Learning

🔍 Search all templates



Recommended



Affinity diagram



Topic Brainstorm



Where in the world



Daily stand-up



Moodboard



Cause and effect diagram



Jobs to be done



Quick retrospective



Cost/benefit analysis

Meeting Types and Template Matching Guide

Meeting Type	Best Whiteboard Template	Why This Template Works
Team Brainstorming Sessions	Brainstorming templates	Pre-built idea capture areas, voting mechanisms, and action item sections
Project Kick-off Meetings	Project Planning templates	Kanban boards, timeline views, and task assignment areas
Sprint Planning/Stand-ups	Project Planning (Daily Stand-up)	Task tracking, progress indicators, and blocker identification
Problem-solving Sessions	Problem Solving templates	Root cause analysis, solution evaluation, and decision matrices
Strategic Planning	Strategy templates	SWOT analysis, goal setting frameworks, and roadmap planning
Customer Research/UX Sessions	Design and Research templates	User journey mapping, feedback collection, and persona development

IN PROGRESS

Register international shipments

Website edits

Meeting with new social media director

MONTHLY CLIENT CALLS DUE: 10/11

Miguel Silva

Kristin Patterson

COMPLETE

Hire x2 NEW associates

We need to get this checked by legal before we can proceed

Sales Analysis

Danielle Booker

02:34

+1 min

Charlotte de Crum

Miguel Silva

Danielle Booker

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IN PROGRESS

COMPLETE

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MONTHLY CLIENT CALLS

DUE: 10/11

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Miguel Silva

Kristin Patterson

Elvia Atkins

Elvia Atkins

Edited: December 19, 2021, 12:33 a.m.

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Charlotte de Crum

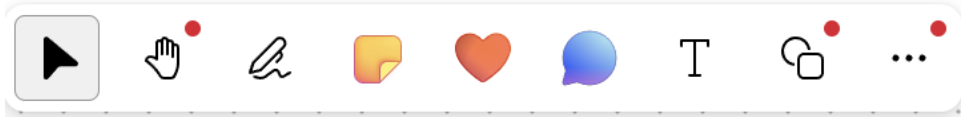
Miguel Silva

Danielle Booker

Bring your whiteboard to life with content

Adding Sticky Notes, Text, Images, and Using Drawing Tools

Tools for presenters



Templates



Images



Documents



Loop
components



Videos



Links

Sticky Notes

These are your bread and butter for capturing ideas.

Quick, colourful idea capture. Supports bullet points, easy to move and group. Great for brainstorming and voting.

Text Boxes

Perfect for headers, instructions, or longer explanations. Structured content with formatting options. Perfect for titles, instructions, or fixed notes.

Images

Visual elements make your whiteboard more engaging. Upload or search online. Resize, annotate, or use as backgrounds. Adds context and visual inspiration.

Drawing Tools

Sometimes a quick sketch says more than words. Freehand sketching with pens, highlighters, and shape recognition. Ideal for diagrams and creative flow.

Marketing Sync

Q4 Plan

Erica Adams

We need to do more research to find the target audiences in this marketing campaign

Reta Taylor

Colin Ballinger

Identify usability before and during the production cycle

Jessica Kline

Have a recent changes log and who made the changes

Financials

Key metrics

	Clients	Orders	Gross revenue	Net revenue
200K	10	1100	\$10,000	\$7,000
200K	20	200	\$20,000	\$16,000
200K	30	300	\$30,000	\$25,000
200K	40	400	\$40,000	\$30,000

Revenue by year

Customer Email

Aadi Kapoor

Q4 marketing campaigns

Confidential

Just now

Follow-up tasks

Item	Assigned to	Due date
☐ Follow up with Dave	@Ross Hall	Wed, Aug 21 (2d left)
☐ Check on incoming shipments	@Assignee	Select date
+ Add a task		

Sales Training

16%

20%

24%

40%

Conventions

Print Advertising

Use consistent naming to make boards searchable

Organise with Folders and Naming

Why being organised matters

Good names tell you what, when, and who. With good names, finding whiteboards becomes effortless.

Whiteboards are saved in OneDrive folders

Best Practices

- Include dates for time-sensitive content
- Use consistent terminology across your organisation
- Archive old whiteboards rather than deleting them
- Regular housekeeping prevents clutter
- Export boards for meeting minutes or visual summaries.
- Always check permissions before sharing externally.

Whiteboard truly shines - seamless collaboration

Exporting and Sharing

Emma Garcia

00:22:06

Stop sharing

Pop-out

People

Chat

Reactions

Notes

Rooms

Apps

More

Camera

Mic

Share

Leave

Sarah Davies

Marketing Sync

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✎

+

Clean mission plan posted on website

Do we have a set launch date yet?

Who, what, and where?

target young audiences

What is...

Weekly blog post articles and matching social posts!

What are our international shipping capabilities?

Shoes need to be durable

Prepare a FAQ before launch date

BRAINSTORMING

Share content

Include computer sound

Presenter mode

Screen

Window (12)

Microsoft Whiteboard

Collaborate on a whiteboard

PowerPoint Live

Marketing Monthly report - May

Marketing Monthly report - April

Marketing Research plan

Team review

Collaborate Live

Share a file that everyone can work on together.

Share Safely and Smartly

Double check email addresses

Before inviting external collaborators, confirm their email addresses to avoid accidental access or sharing with the wrong person.

Avoid “Anyone with the link”

Use this option only when absolutely necessary. It can expose your board to unintended viewers, especially if the link is forwarded.

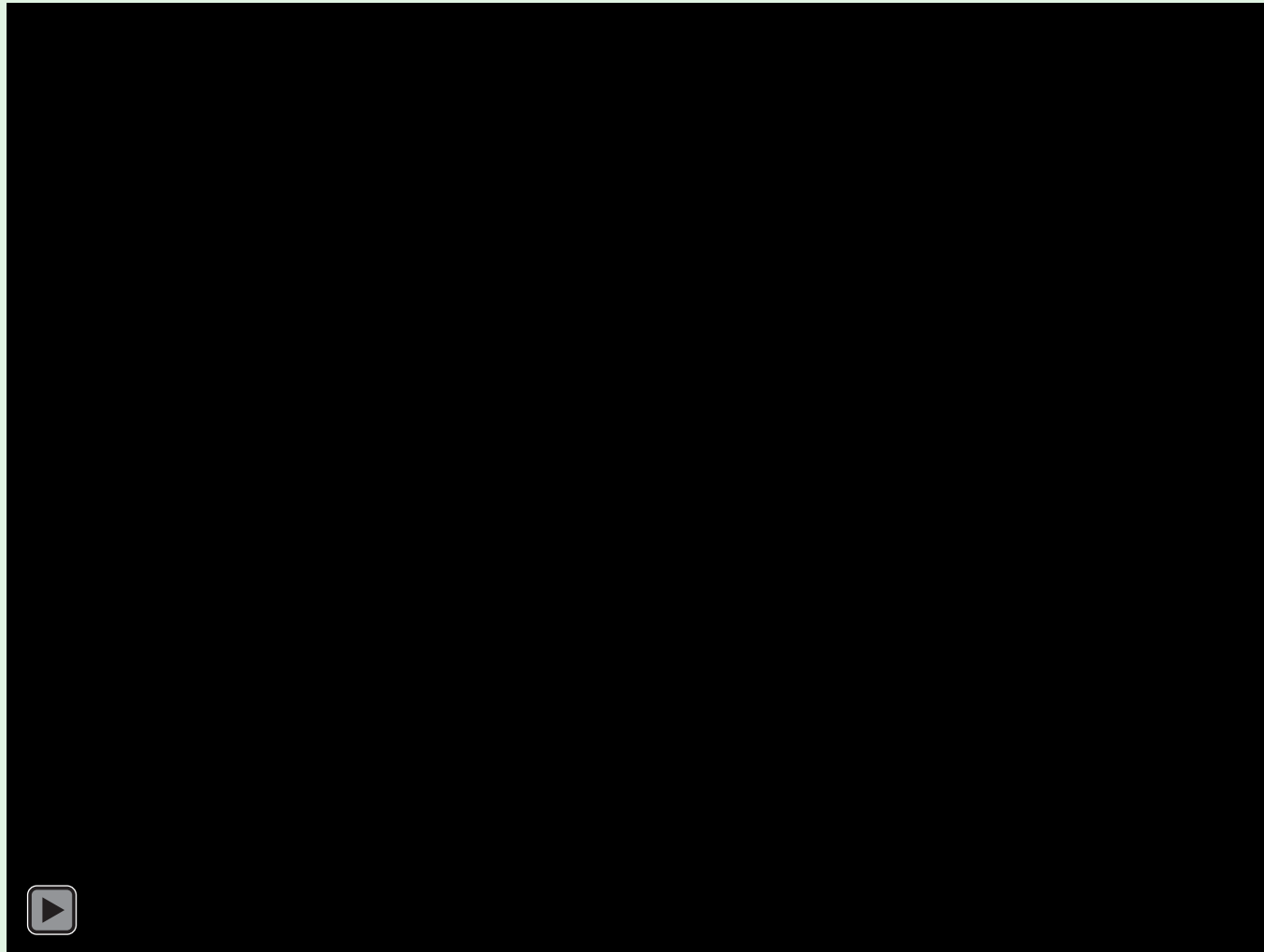
Use view-only links for final versions

When sharing completed boards or exported images, set permissions to view-only to prevent unwanted edits or changes.

Test the link before sending

Open the shared link in a private browser window to verify access settings and ensure the board behaves as expected for recipients.

Real-time collaboration



Resources

[Getting Started with Microsoft Whiteboard](#)

A comprehensive walkthrough of Whiteboard's features, including how to create boards, use templates, collaborate in Teams, and export content.

[Guides to Microsoft Whiteboard](#)

Role-based and scenario-specific guides to help you use Whiteboard effectively in different environments.

[Whiteboard Help & Learning Hub](#)

Centralised access to tutorials, FAQs, and troubleshooting.

[Summarise Ideas with Copilot in Whiteboard](#)

Learn how to use AI-powered Copilot to summarise brainstorming sessions

[Smarter Note-Taking with Microsoft 365](#)

Covers Whiteboard alongside OneNote and other tools, with practical demos by Microsoft MVP Heather Severino



Thank you

Next session is about Microsoft ClipChamp

September Spotlight Session