

## YOUR ACTION PLAN

# Make Your Meeting Hand Off Work

Turn one meeting into a checked action record with one handoff confirmed or clearly blocked.

You don't need better meeting notes sitting unread in a better folder. You need to know what happens next—and whether the next person will get what they need. We'll turn one meeting into an action record, then check a handoff from the receiver's side.

## WHAT YOU'LL NEED

- ☐ An AI assistant your organization permits for this material, with appropriate data-handling settings
- ☐ One approved, low-stakes meeting transcript or detailed notes
- ☐ An attendee to review the record, plus access to the people involved in one handoff
- ☐ Your team's existing work tracker

## STEP 1

## 1 Prepare a safe working copy

Choose a routine planning meeting, not hiring, legal advice, or sensitive personnel matters.

1. Before creating or processing a transcript, confirm that the required recording/transcription consent was obtained and that its use complies with applicable organizational rules and local law. If you can't confirm this, use another explicitly approved source.
2. Confirm that your organization allows this material in the chosen assistant. Check its official privacy documentation against your organization's requirements. ChatGPT's Data Controls FAQ below is a starting point, not permission.
3. Remove sensitive details the task doesn't need. Keep speaker labels, commitments, conditions, and timing intact so you can check the record.
4. If upload permission is unclear, obtain approval or choose explicitly cleared material before uploading. You should now have an approved working copy.

Heads up: Removing names doesn't necessarily remove confidential information or authorize sharing.

## STEP 2

**2 Build the draft record**

1. Paste the prompt below into your approved assistant, replacing the placeholder with your working copy.
2. Look for evidence, missing information, and a handoff check—not just a summary. Save it as “DRAFT — not yet confirmed.”

## COPY THIS PROMPT

Turn the meeting text below into a draft execution record using only explicitly stated information.

Return these sections:

1. Confirmed decisions: decision and brief exact supporting quote.
2. Assigned actions: owner, specific next step, deadline, dependency or condition, and brief exact supporting quote.
3. Open questions: question, owner if assigned, and what must be resolved.
4. Discussed but not approved: idea, status (proposed, deferred, or rejected), and supporting quote.
5. Risks and missing information: gap, why it matters, and responsible person if stated.

Do not infer agreement from silence. Do not invent owners, dates, authority, or dependencies. Keep conditional commitments conditional. Write NOT STATED for missing details. Flag unclear speakers, conflicting statements, and competing dates without choosing a winner. Flag relative dates or missing years for human clarification.

Then check explicitly stated handoffs. Show what the sender promised and what the receiver needs, with exact quotes. Flag mismatches in readiness, timing, approval, or delivery. Choose one handoff another stated action depends on and give one question that would close its gap. Do not connect unrelated tasks. If no handoff is established, say so and suggest one question for an attendee.

Meeting text:

[PASTE PERMITTED TRANSCRIPT OR NOTES HERE]

## STEP 3

**3 Check what “ready” means**

A draft and approved copy are different deliveries, even when both arrive Tuesday.

1. Compare each decision and action with its original passage. Correct mismatched quotes, invented owners, and overstated promises. “I’ll ask Legal Monday” doesn’t mean Legal will approve Monday.
2. Compare the selected sender’s promised output with the receiver’s required input. Leave missing approvals, delivery details, conditions, or dates visibly missing.

3. Write one gap question: “Who will get Tuesday’s draft approved before the builder starts?” If no handoff was stated, ask an attendee which action depends on someone else’s output.

Heads up: AI checking its own answer isn’t independent confirmation. The source and the people involved supply that check.

#### STEP 4

### 4 Get the missing agreement

1. Review the draft decisions, actions, and evidence with one attendee. Flag disputed wording or unclear speakers rather than guessing.
2. Send the handoff’s quotes and gap question to the people involved. Ask the sender to confirm the deliverable, calendar date, and conditions; ask the receiver whether that lets them start. If approval is needed, establish who accepts that responsibility and by when.
3. Record replies with names and confirmation dates, separate from meeting evidence. Keep unanswered commitments unconfirmed; an attendee can’t accept someone else’s new task for them.

#### STEP 5

### 5 Publish the usable version

1. Add confirmed follow-up agreements without presenting them as original meeting decisions.
2. Mark unanswered items UNCONFIRMED and dependent work BLOCKED where appropriate. Separate unresolved questions from accepted actions.
3. Put the checked record in your existing work tracker, with evidence accessible only to appropriate people.

#### YOU’RE DONE WHEN...

Can the receiver see exactly what they’ll get and when, or why they’re blocked? If blocked, the next move is getting the unanswered agreement—not starting work on an assumed promise.

#### OFFICIAL SETUP & HELP

[OpenAI Help: Data Controls FAQ, if using ChatGPT](#)