

Meeting to Action AI Assist Pattern

Use the method

Convert meeting notes into a draft decision and action record that people confirm. Use this when minutes are long but commitments are hard to find. The output separates decisions, proposed actions, unresolved questions, and evidence. AI assists extraction; people confirm what was actually agreed.

- 1. Prepare approved notes.** Use a permitted record of the meeting and identify the date, participants, and source. Correct obvious transcription errors before relying on them.
- 2. Ask for separate records.** Request decisions, actions, and unresolved questions in separate groups. Require a source excerpt or note reference for each item.
- 3. Prevent invented commitments.** Instruct the AI to mark missing owners and dates explicitly. A suggestion discussed in a meeting is not automatically an agreed action.
- 4. Compare to the source.** Check each item against the notes. Preserve dissent, conditions, and dependencies. Remove duplicate actions without changing their meaning.
- 5. Confirm with accountable people.** Use your normal confirmation process to verify owner, due date, and decision authority. Mark each item proposed, confirmed, or rejected.
- 6. Publish the approved record.** Place only confirmed commitments into the action tracker. Keep unresolved items visible and retain the approved notes and correction history.

Worked example

Illustrative note: "Alex will check the supplier date by Thursday. We discussed moving installation to next week, but no decision was made. Customer notice will depend on the supplier update."

Draft action: Alex checks supplier date; due Thursday, with the actual calendar date confirmed from the meeting context. Draft question: should installation move? Draft dependency: customer notice depends on the supplier update.

A failing extraction claims installation has been rescheduled or assigns the customer notice to an unnamed participant. The reviewer rejects those additions.

After confirmation, the action tracker records Alex's commitment and its evidence. The scheduling question remains open until an authorized person decides it.

Before you put it to work

- ☐ Every extracted item has support in the source record.
- ☐ Discussion is distinguished from agreement.
- ☐ Owners and dates are confirmed rather than guessed.
- ☐ Only approved items are entered as commitments.

If the problem keeps returning

If actions repeatedly need correction, improve note taking. Capture explicit decision wording, an owner, and a calendar date during the meeting, then read them back before closing.

Connect the tools

Use AI-02 for the extraction spec and BO-04 for the follow-up review.

First use

Use the worksheet on the next page for one real task. Complete the decision fields, name the person responsible, and choose a review date. Duplicate the worksheet when you need another record.

Working worksheet

Name or team _____ Date _____

Meeting and source

Title, date, participants, approved notes location, and reviewer.

Decisions and unresolved questions

Type and wording	Authority or owner	Source reference	Conditions and status

Duplicate rows or this worksheet for additional records.

Action candidates

Action	Owner	Due date	Source	Dependency	Confirmation

Duplicate rows or this worksheet for additional records.

Complete and review

Extraction instructions

Separate decisions, actions, and questions; preserve source support; flag missing owners dates and disagreements.

Confirmation and correction record

Corrections, accountable people, confirmations, rejected candidates, and unresolved items.

Approved record

Final tracker location, publication owner, and next review date.

Review after use

Which extracted item was rejected or corrected? _____

Which commitments remain unconfirmed? _____

What needs to be captured more clearly at the next meeting? _____

Where will the next review check action completion? _____

Next action _____ Owner _____ Due _____