

Prepare Your Meeting for Better Follow-Up

A 12-point checklist for clear decisions, actions and AI-assisted minutes

HOW TO USE IT Use this before a meeting that needs a useful record, decisions or action tracking. Tick each check that applies. Mark N/A where it does not.

1 Purpose and people

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1. Define the purpose and result

Write one sentence explaining why the meeting is needed and list the decisions, approvals, information or plans it should produce.

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2. Shape the agenda around outcomes

Turn each main topic into a question or required outcome. State what is in scope, outside scope and available for decision.

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3. Confirm the right people and authority

Invite the people needed to decide, advise or deliver. Confirm that each decision maker will attend or has delegated authority.

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4. Send the context and preparation request

Share the agenda and essential information in time. Tell each attendee what they need to review, bring or prepare.

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5. Assign the meeting roles

Name the chair or facilitator, the capture owner and the person who will approve the follow-up.

Your meeting brief

MEETING AND DATE

DECISIONS OR OUTPUTS NEEDED

CHAIR AND CAPTURE OWNER

RECORDING OR INFORMATION CONSTRAINTS

PURPOSE AND RESULT

DECISION MAKER OR AUTHORITY

RECORD AND ACTION DESTINATION

FOLLOW-UP OWNER AND TIMESCALE

Capture, control and follow-through

2 Capture and control



6. Choose one capture method and destination

Decide how you will capture the meeting and where the approved record will be stored. Avoid parallel notes without a clear primary record.



7. Check recording and transcription arrangements

Check organisational policy and purpose. Tell participants in advance and confirm access, objections and retention arrangements.



8. Use an approved AI tool and information boundary

Confirm that the chosen tool is approved for the information involved. Keep confidential or sensitive material out unless your organisation permits it.



9. Prepare the transcript and human review

Check audio, speaker names and key terms. Name a person to verify meaning, decisions, owners and dates before use.

3 Close and hand off



10. Protect the final five minutes

Reserve time to restate decisions, unresolved points and next steps before the meeting ends.



11. Use one action format

Record each action with a clear task, named owner, due date or review point, and status.



12. Plan the hand-off

Choose where approved decisions and actions will be logged. Name who will send the follow-up, who approves it and the expected timescale.

BEFORE YOU USE AN AI-ASSISTED DRAFT

Check the record against the meeting, not against what looks plausible.



Meaning and scope



Names and speaker attribution



Decisions versus proposals



Actions, owners and dates

Evidence-informed practical guidance. This checklist does not replace active facilitation, organisational policy, data-protection advice or human review.