



AI WITHOUT THE HYPE | FREE RESOURCE

Meeting Follow-Up Workflow Checklist

A practical GR Consulting Services worksheet for checking what still happens after AI produces meeting minutes.

Use this resource to map the review, record-keeping, task updates and follow-up around an AI-generated meeting draft before adding more tools or automation.

Practical AI for founder-led SMEs

Purpose

Use this checklist to see what still happens after AI produces meeting minutes. The aim is to understand the current process before adding tools, connections or automation.

Choose one recent, suitable meeting. Mark each step:

Clear: the step has a named owner and a consistent method.

Manual: it works, but relies on repeated copying, checking or memory.

Unclear: it is inconsistent, easily missed or has no clear owner.

Not needed: the step does not apply to this meeting.

How to use the checklist

Start with one meeting rather than trying to map every workflow at once. Circle repeated copy-and-paste, filing, renaming and re-entering work. Mark points where an error could create the wrong task, record, deadline, recipient or commitment.

| Meeting or process being reviewed |
|-----------------------------------|
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| Reviewer and date |
|-------------------|
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1. Input

| Check | Clear | Manual | Unclear | Not needed | Notes or owner |
|---|--------------------------|--------------------------|--------------------------|--------------------------|----------------|
| Participants knew about the recording or transcription, and required permissions were handled | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The transcript was appropriate to use in the chosen AI tool | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Confidential, personal or client information was handled under the relevant rules | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The correct transcript and meeting context were supplied | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

2. AI Draft

| Check | Clear | Manual | Unclear | Not needed | Notes or owner |
|--|--------------------------|--------------------------|--------------------------|--------------------------|----------------|
| The same approved instructions and output format are used each time | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Summary, decisions, actions and follow-up are separated clearly | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Missing owners or dates remain not stated rather than being invented | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Unclear names, commitments or decisions are flagged | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

3. Human Review

| Check | Clear | Manual | Unclear | Not needed | Notes or owner |
|--|--------------------------|--------------------------|--------------------------|--------------------------|----------------|
| A named person checks participant names and roles | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Decisions are checked against what was actually agreed | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Actions, owners and due dates are supported by the transcript | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Confidential or irrelevant discussion is removed where appropriate | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The reviewer resolves or escalates missing information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

4. Approved Record

| Check | Clear | Manual | Unclear | Not needed | Notes or owner |
|---|--------------------------|--------------------------|--------------------------|--------------------------|----------------|
| The final meeting record is stored in the correct location | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The approved version is distinguishable from the AI draft | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| File names, dates and project or client references are consistent | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Somebody can see who reviewed or changed the record | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

5. Actions and Updates

| Check | Clear | Manual | Unclear | Not needed | Notes or owner |
|---|--------------------------|--------------------------|--------------------------|--------------------------|----------------|
| Agreed actions reach the system where work is managed | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Each action has a confirmed owner or is visibly unassigned | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Each due date is confirmed or visibly missing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Relevant project, client or operational records are updated | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Duplicate or conflicting task entries are checked | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

6. Follow-Up

| Check | Clear | Manual | Unclear | Not needed | Notes or owner |
|---|--------------------------|--------------------------|--------------------------|--------------------------|----------------|
| The correct participants and recipients are confirmed | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The message reflects the approved record | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The draft does not add promises or commitments that were not made | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| A named person approves the message before it is sent | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The final communication is retained where required | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

Improvement Map

Use this page to turn the checklist into one practical next step. Keep the change small enough to test.

Circle the repeated handling: where do people copy, rename, file, reformat or re-enter information?

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Mark the risk points: where could an error create the wrong task, record, deadline, recipient or commitment?

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Choose One Improvement

Step to improve

Current problem

Proposed change

Named owner

Human review point

How success will be measured

Review date

Decision Guide

Keep the method simple when the process is occasional, low risk, owned by one person and quick to check.

Consider a more repeatable or connected method when the process is frequent, relies on several manual transfers, affects shared records or regularly loses actions, owners or deadlines.

Do not automate an unclear process. Define the owners, records, exceptions and approval points first.

GR Consulting Services

GR Consulting Services helps founder-led SMEs identify practical AI opportunities, map useful workflows and plan the context and controls needed for reliable implementation.

Next step: Discuss your next step