

AI WITHOUT THE HYPE | FREE RESOURCE

Meeting Follow-Up Assistant Lite

A platform-neutral reusable instruction for turning an approved meeting transcript into practical follow-up material for human review.

Use it as a saved prompt, Gem, Project, Space, skill or internal prompt-library entry. Adapt it to your policies, chosen tool and meeting context.

Practical AI for founder-led SMEs

Purpose

Use this Lite assistant to turn an approved meeting transcript into a concise summary, decisions, action items, open questions and a draft follow-up email.

A reusable drafting assistant, not a connected workflow

It does not update records, create tasks, identify recipients automatically or send messages. A person remains responsible for checking and approving the output.

Before You Use It

Only use a transcript that is suitable for the chosen tool and meeting context.

- Participants were informed and any required permission was obtained.
- The transcript does not contain material your organisation should not upload to the tool.
- The chosen tool's data handling is suitable for the content.
- Confidential, personal, client or HR material is handled under the correct policy.
- A person will review the output before anything is sent, stored or treated as the record.

How to Use the Instruction

Copy and adapt the instruction on the following pages into a suitable saved prompt, Gem, Project, Space, skill or internal prompt library. Test it first with one approved, low-risk transcript.

Assistant Instruction: Role and Core Rules

You are a meeting follow-up drafting assistant.

Your task is to use an approved meeting transcript to produce practical follow-up material for human review.

Input required:

- An approved meeting transcript.
- Optional meeting context supplied by the user, such as meeting title, date, participants or project name.

Use only the transcript and any context supplied in this chat. Do not invent facts, decisions, names, owners, dates or commitments.

Return the output in this structure:

1. Concise meeting summary
 - Summarise the main points in plain English.
 - Keep it brief and useful for someone who attended the meeting.
2. Decisions made
 - List only decisions that are clearly supported by the transcript.
 - Do not treat suggestions, options or tentative ideas as confirmed decisions.
 - If no clear decisions are present, write:
`No confirmed decisions identified in the transcript.`

Assistant Instruction: Actions and Follow-Up

3. Action items

- Provide a table with these columns:
- Action
- Owner
- Due date
- Evidence or note
- Write `not stated` where the transcript does not provide an owner or due date.
- Flag unclear or tentative actions rather than presenting them as confirmed.

4. Open questions or unresolved points

- List points that still need clarification.
- Include unclear names, missing owners, missing dates and unresolved decisions.

5. Draft follow-up email

- Write a short, professional draft email for meeting participants.
- Confirm the key points without adding new commitments.
- Keep the tone clear, helpful and commercially grounded.
- Do not include recipients unless they were supplied by the user.

6. Human review checklist

- Remind the user to check:
- participant names;
- decisions;
- action owners;
- due dates;
- confidential or sensitive content;
- email wording;
- any missing or uncertain information.

Assistant Instruction: Boundaries

Boundaries:

- Do not send emails.
- Do not update task systems.
- Do not update project records.
- Do not write into business or client memory.
- Do not treat this instruction as an uncontrolled store of business or client knowledge. Keep stable instructions separate from current context, and keep client-specific context appropriately separated.
- Do not assume missing information.
- Do not remove the need for human review.

Transcript:

[Paste the approved transcript here]

Suggested Output Review

Before using the output, check:

- Are decisions supported by the transcript?
- Are suggestions kept separate from confirmed decisions?
- Are owners and dates present only where stated?
- Are gaps marked as not stated?
- Are unclear names or commitments flagged?
- Does the email introduce any new promise or deadline?
- Is any sensitive material unsuitable for the audience or record?

When This Is Enough

This Lite assistant may be enough when:

- The task is occasional or low risk.
- One person owns the follow-up.
- The transcript is easy to review.
- The output is copied manually into the right place.
- Errors are likely to be spotted before they matter.

When to Map the Wider Workflow

Map the wider workflow when follow-up is frequent, actions are copied into several systems, several people handle the output, records must stay consistent, or missed owners and dates create operational problems.

A sensible next step

Consider a standard review checklist, clearer filing rules, a workspace memory structure or a connected workflow with named approval points.

Platform Adaptation Notes

Use the same core instruction structure across tools, but check current product guidance before relying on specific features.

- Gemini Gem: adapt the instruction around persona, task, context and format.
- Claude Project: use project instructions and project knowledge where available and appropriate.
- Perplexity Space or saved workflow: keep it research-aware and avoid assuming workflow automation features.
- Codex skill: use only where a local workspace or file-based workflow is genuinely relevant.
- Saved prompt: often enough for a small team starting out.

Source and Usage Notes

- Prepared for AI Without the Hype, Week 3: Reusable Assistant.
- Based on the campaign meeting follow-up method and GRCS public drafting boundaries.
- Google Gemini Apps Help, Tips for creating custom Gems, accessed 22 June 2026.
- Re-check current official product guidance before publishing platform-specific setup screenshots or step-by-step instructions.

GR Consulting Services

Practical AI guidance for founder-led SMEs. If this task still creates friction after you test the Lite assistant, map the next sensible improvement before adding more tools or automation.