
MEETING PREP AND NOTES WORKFLOW

15 MIN PER MEETING · THEN A 30-MIN RETRO FRIDAY

Objective. *Apply pre-meeting and post-meeting prompts to every meeting for one week and document what changed.*

CONCEPTS TO KEEP IN MIND

- **The prep is a compounding edge.** Walking into a meeting with a one-page brief beats walking in cold every time — and AI generates the brief in 90 seconds.
- **Action-item extraction catches things you'd miss.** Especially in meetings you ran — your attention was on running, not capturing.
- **Failure is data.** Note where the prompts produce bad output. That's where the next iteration improves.
- **Don't dump confidential meeting notes into a personal AI account.** If notes contain client names, salaries, internal numbers — use whatever your org has approved, or sanitize first.

SCENARIO

Your week has six meetings. Some are critical, some are recurring slogs. Today you set up two prompts you'll run

on each — one before, one after — and see what changes.

PROMPTS TO TRY

Pre-meeting prep:

[Context] I have a meeting in [N] minutes about [topic] with [who's there + their role]. The goal of the meeting is [stated goal] and what I personally need out of it is [your goal – may differ].

[Specific Details]

Background I'd want walking in:

- [bullet – e.g., last time we met they said X]
- [bullet – e.g., the related project status is Y]
- [bullet – anything else relevant]

[Intent] Prepare me to walk in sharp. Surface what I might be missing.

[Desired Format]

- One-sentence framing of what this meeting actually is (not what the calendar invite says)
- Three questions I should be ready to answer
- Three questions I should consider asking
- One thing I should NOT say (based on the goal)
- A 2-line opener I could use if I'm starting the meeting

[Constraints] Honest, not flattering. If you think my goal is wrong, say so.

Post-meeting action items:

[Context] I just left a meeting about [topic] with [attendees]. Below are my notes (rough).

[Specific Details]

[Paste raw notes – typos, fragments, all of it]

[Intent] Extract the actual decisions and action items. I'll forget half by tomorrow if you don't.

[Desired Format]

- Decisions made (bulleted; flag any that felt soft as "[unconfirmed]")
- Action items: who, what, by when (if a "when" wasn't stated, mark "[no due date set]")
- Things mentioned that *should* have been action items but weren't (the "loose ends" list)
- One question I should follow up on this week

[Constraints] Don't invent action items. If something is ambiguous in my notes, mark it [unclear] rather than guessing.

DELIVERABLE

By Friday, one page covering:

1. How many meetings you ran the prep prompt on (target: all of them)
2. One specific moment where the prep changed your behavior in a meeting
3. One action item the post-meeting prompt caught that you would've forgotten
4. One place a prompt failed (output was off, hallucinated, or just unhelpful) — and what you'd change

SIGNS OF SUCCESS

- At least one meeting felt different because you walked in prepared.
- The action-item extraction caught something real. (If it didn't, your notes were too thin — capture more next time, or run it on a meeting transcript.)
- You can name the failure mode of each prompt. ("Pre-meeting tends to over-prepare for collaborative meetings; works best for ones with a stated decision.") That's the iteration muscle.
- You're already adjusting one of the two prompts for next week.

Deliverable. A short writeup (one page max) covering what you changed, what worked, what you'd modify next iteration.