

The Meeting-to-Action Guide: Build a Checked Execution Record with AI

Turn a permitted meeting transcript into a clear record of decisions, owners, next moves, dependencies, and unresolved questions. By the end, you will have tested the process, reviewed its mistakes, and learned a workflow you can reuse after real meetings.

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01 Build and test your first execution record

You are about to turn a short meeting transcript into a candidate execution record: a structured account of what was decided, who accepted an action, what happens next, and what still needs attention. You will use a supplied transcript first, so there is no blank page and no sensitive meeting content to manage.

Before using a real transcript, confirm that you are permitted to process it. Follow your organization's policies, remove unnecessary sensitive information, and use only an AI assistant your organization allows. Review the provider's data-handling, retention, training, sharing, and personalization settings before submitting private material.

1

OPEN

Start a fresh AI conversation

Sign in to the AI assistant you are permitted to use and open a new conversation. A new conversation separates this test from the messages in the current thread, but some assistants may still apply saved memories, personalization, custom instructions, or connected sources. For the cleanest test, use an approved temporary or non-personalized mode when available, or account for those settings during review.

2

COPY

Copy the complete prompt below

Copy the instructions exactly for your first run. The rules prevent the AI from quietly inventing owners, deadlines, authority, or agreement.

PROMPT

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Convert the meeting transcript below into an execution record.

Use only information explicitly stated in the transcript. Preserve the distinction between a confirmed decision, a proposal, a conditional commitment, a deferred decision, and a rejected idea.

Return these five sections:

1. Confirmed decisions. Create a table with: Decision | Supporting transcript evidence.
2. Assigned actions. Create a table with: Owner | Specific next step | Deadline | Dependency or condition | Supporting transcript evidence.
3. Open questions. Create a table with: Question | Owner, if assigned | What is needed to resolve it | Supporting transcript evidence.
4. Discussed but not approved. Create a table with: Idea | Status (proposed, deferred, or rejected) | Supporting transcript evidence.
5. Risks and missing information. Create a table with: Item | Why it matters | Responsible person, if stated.

Rules:

- Use brief, exact quotes as evidence.
- Do not infer agreement from silence or general discussion.
- Do not invent owners, deadlines, authority, dependencies, or decisions.
- Keep conditional commitments conditional.
- If information is missing, write NOT STATED.
- If a speaker label or statement is unclear, flag it instead of resolving it yourself.
- Flag contradictions or competing dates without choosing a winner.

Finish with a section titled Human review required that lists every item a person should verify, assign, clarify, or convert into an exact calendar date before the record is shared.

Meeting transcript:

[PASTE TRANSCRIPT HERE]

Use this supplied transcript for your first test:

SCRIPT

Maya: We've agreed to hold the customer webinar on October 18.

Jon: I can draft the invitation copy by Tuesday.

Priya: Once the copy is final, I can build the landing page by Thursday, assuming I receive the final copy Tuesday.

Maya: We'll use our current customer list. No paid ads for this one.

Jon: The legal disclaimer may be outdated. I'll check with Legal by Monday.

Priya: We should probably record it.

Maya: Good thought. Let's decide after we confirm the platform settings.

1

PASTE

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Put the prompt into the message box

Paste the full prompt into the AI assistant's message box. Replace the final placeholder with the supplied transcript. Keep the instructions above it.

2

SEND**Run the test**

Submit the message. You should receive five organized sections followed by Human review required.

3

LOOK**Find the decision-to-action chain**

Look for each confirmed decision, its evidence, every named owner, the specific next move, timing, and any dependency. Do not judge the prose yet. Judge whether the record preserves what people actually said.

02 Check the result against the answer key

Your AI assistant may use different wording or formatting. That is fine. The classifications and source evidence should match the transcript.

Confirmed decisions

DECISION	EVIDENCE
Hold the customer webinar on October 18	Maya: We've agreed to hold the customer webinar on October 18.
Use the current customer list	Maya: We'll use our current customer list.
Do not use paid advertising	Maya: No paid ads for this one.

Assigned actions

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OWNER	NEXT STEP	TIMING	DEPENDENCY OR CONDITION	EVIDENCE
Jon	Draft the invitation copy	Tuesday; exact calendar date not stated	NOT STATED	Jon: I can draft the invitation copy by Tuesday.
Jon	Check with Legal about whether the disclaimer is outdated	Monday; exact calendar date not stated	NOT STATED	Jon: The legal disclaimer may be outdated. I'll check with Legal by Monday.
Priya	Build the landing page	Thursday; exact calendar date not stated	Final copy must arrive Tuesday	Priya: Once the copy is final, I can build the landing page by Thursday, assuming I receive the final copy Tuesday.

Open questions

QUESTION	OWNER	NEEDED TO RESOLVE IT	EVIDENCE
Should the webinar be recorded?	NOT STATED	Confirm the platform settings, then make a decision	Priya: We should probably record it. Maya: Let's decide after we confirm the platform settings.

Discussed but not approved

IDEA	STATUS	EVIDENCE
Record the webinar	Deferred; not approved	Maya: Let's decide after we confirm the platform settings.

Risks and missing information

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ITEM	WHY IT MATTERS	RESPONSIBLE PERSON
The year for October 18 is not stated	The event date is incomplete and could be interpreted incorrectly later	NOT STATED
Monday, Tuesday, and Thursday are relative dates	They could be interpreted incorrectly when the record is shared later	NOT STATED
Priya depends on receiving final copy Tuesday	A late handoff could move the landing-page delivery date, and ownership of the final-copy handoff is not explicitly assigned	NOT STATED
The legal disclaimer may be outdated	The invitation may require revised language	Jon
Nobody owns confirmation of the platform settings	The recording decision cannot be closed without it	NOT STATED

Human review required

- Confirm the year for October 18.
- Convert the relative weekdays into calendar dates using the meeting date and intended time zone.
- Clarify who owns finalizing and delivering the invitation copy.
- Assign an owner to confirm the platform settings.
- Confirm that Jon and Priya accept the recorded actions and dependencies.
- Verify that Maya's wording reflects authorized decisions.

Your test passes if recording remains an unresolved, deferred idea; Priya's action remains conditional; the AI does not invent calendar dates or a year; and the missing platform-settings and final-copy-handoff owners stay unassigned. It fails if the AI approves recording, guarantees Priya's deadline, or guesses missing details.

03 Nothing happened? Check these first

- Confirm that you submitted the message instead of leaving it in the message box as an unsent draft.
- Confirm that the test transcript appears after the Meeting transcript label. An execution prompt without a transcript has nothing to examine.
- If you received only a generic summary, start a fresh conversation and paste the complete prompt rather than a shortened version.
- If tables are empty, check that the transcript is readable and that each statement still has its speaker label.
- If the response stops before all five sections, ask the AI to continue from the first missing section without changing earlier classifications.
- If the interface reports an error, follow the displayed error guidance and retry with the short supplied transcript before using real meeting material.

SCRIPT

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Re-run the transcript as an execution record, not a general summary. Include all five requested sections and Human review required. Use only explicit transcript evidence, preserve conditional language, and write NOT STATED instead of guessing.

Do not repair an unclear transcript by guessing what somebody probably meant. Mark the ambiguity for human review. A confident invention is still an invention, even when it arrives in a lovely table.

04 Make the record real with human review

AI can extract candidate commitments. It cannot create legitimate accountability by vibes. Treat its first output as a draft until a person checks it against the transcript and the people involved.

1

VERIFY

Check every evidence quote

Compare each quoted statement with the transcript. Correct missing words, speaker-label errors, and claims that are stronger than the source.

2

CLASSIFY

Separate decisions from discussion

Make sure suggestions, deferred choices, and rejected ideas did not become confirmed decisions merely because they were discussed.

3

CONFIRM

Check ownership and conditions

Ask whether each named person actually accepted the action. Keep every if, once, assuming, and after condition attached to the commitment.

4

DATE

Complete and replace ambiguous timing

A relative date is wording such as Monday, next week, or tomorrow. Convert it into an exact calendar date only after checking the meeting date, intended year, and time zone. Also complete partial dates such as October 18 when the year is not stated.

5

AUTHORIZE

Verify decision authority

A statement's presence in the transcript does not prove that the speaker had authority to commit money, personnel, customers, policy, or legal obligations. Verify those decisions with the appropriate person.

6

SHARE

Confirm the checked record

Have the relevant owners review their actions, dependencies, and dates before distributing the execution record according to your organization's policies.

CHECKLIST

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- Every confirmed decision has direct evidence.
- Every action has an owner or says NOT STATED.
- Every action has a concrete next move.
- Every deadline is exact or clearly marked as missing, partial, or relative.
- Every dependency remains attached to its action.
- Every unresolved question is visible.
- Proposals and deferred ideas remain unapproved.
- Contradictions are flagged instead of resolved by the AI.
- Decision authority has been checked where it matters.
- Sensitive information has been handled according to policy.

05 Improve the input and the judgment

Build a clean source packet

A source packet is the small set of permitted material used to create and verify the record. For this workflow, keep it simple: the transcript with reliable speaker labels, the meeting date and time zone for human date conversion, and any corrections you have independently verified. Keep unnecessary sensitive details out.

- Preserve the speaker's actual level of certainty.
- Mark inaudible, missing, or unclear statements instead of silently rewriting them.
- Keep meeting metadata available to the human reviewer.
- Do not add remembered decisions to the transcript unless they are clearly labeled and verified separately.

Handle a transcript that is too long

Paste or attach the complete transcript when your approved assistant can process it reliably. If the tool rejects, truncates, or loses track of a long transcript, divide it at natural agenda boundaries rather than in the middle of an exchange.

1. Label each part with its meeting name, date, and sequence number.
2. Run every part with the same extraction prompt.
3. Keep the evidence quotes and source-part labels in each result.
4. Combine the candidate records, then check for duplicated actions, changed decisions, cross-part dependencies, and contradictions.
5. Review the combined record against the original transcript before treating it as complete.

A chunk-by-chunk result can miss a decision that was proposed early and approved later. Never assume separate partial outputs form a complete meeting record until a person reconciles them across the full transcript.

Treat language as a signal, not an automatic rule

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LANGUAGE TO EXAMINE	POSSIBLE CLASSIFICATION	WHAT TO CHECK
We've agreed to...	Confirmed decision	Was this an authorized decision?
I'll do...	Assigned action	Is the next move specific, and was timing stated?
I can do it if...	Conditional action	Is the condition preserved?
We should...	Proposal	Did anyone explicitly approve it?
Let's decide after...	Deferred decision	What must happen first, and who owns it?

Context can change the classification, so use these as review signals rather than mechanical rules. Silence is not approval, and polished wording is not proof.

Keep a human at the wheel

Use extra caution for decisions involving money, personnel, customers, policy, legal commitments, or anything difficult to reverse. For a sensitive hiring discussion, use only an approved, limited record to identify process actions and unresolved questions. Do not use this workflow to score candidates or infer private traits.

06 Practice two common failure modes

Open a fresh AI conversation for each practice. Paste the same Meeting-to-Action Prompt, replace the transcript placeholder with the supplied text, and compare the result with the answer key.

Practice A: A suggestion hiding inside conditional language

SCRIPT

Sam: We should send the customer survey Friday.

Rina: I can draft it Thursday if Legal approves the questions by Wednesday.

Sam: Good. Let's wait for Legal before deciding whether it goes Friday.

CHECKLIST

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- No final decision to send the survey Friday should appear.
- Rina's drafting action should remain conditional on Legal approval.
- The Thursday and Wednesday timing should remain relative unless exact dates are known.
- Sending Friday should be classified as deferred, not approved.
- The owner responsible for obtaining or coordinating Legal approval should remain NOT STATED unless explicitly assigned.

Practice B: Competing dates

SCRIPT

Mia: The launch review is June 12.

Owen: My calendar says June 13.

Mia: Don't change anything yet. I'll confirm with the client tomorrow.

CHECKLIST

- The record should flag June 12 and June 13 as competing dates.
- It should not choose one date as correct.
- The missing year should also be flagged unless meeting metadata resolves it.
- Mia should have an action to confirm the date with the client.
- Tomorrow should be marked as a relative date requiring conversion.
- A human should verify whether Mia had authority to issue the instruction not to change anything.

If the AI passes both practices, it is following the extraction rules more reliably. That still does not remove the human review requirement.

07 Run it on a real low-stakes meeting

Now repeat the process with one recent internal meeting where the consequences of a classification mistake are manageable.

1

CHOOSE

Use a permitted transcript

Select a transcript or speaker-by-speaker written record you already have permission to process. Good first choices include an internal planning meeting, project handoff, or recurring status meeting.

2

REDUCE

Remove unnecessary sensitive details

Keep only the material needed to identify decisions, actions, questions, dependencies, and risks.

3

RUN

Use the complete prompt

Open a fresh conversation, paste the Meeting-to-Action Prompt, replace the transcript placeholder, and submit it.

4

REVIEW

Check the output against the source

Look especially for invented ownership, incomplete or fuzzy dates, missing dependencies, conditional promises made unconditional, and ideas mislabeled as decisions.

5

CONFIRM

Review it with one attendee

Ask another attendee to verify the decisions, owners, timing, dependencies, and unresolved questions. Correct the record before sharing it more broadly.

What success looks like: another attendee can read the checked record and identify what was decided, who is doing what, what must happen first, and what still requires a decision without reconstructing the entire meeting.

08 Save the repeatable workflow

The reusable mental model is simple: Decision → Owner → Next move. The five output sections keep uncertainty from being polished into fake certainty.

CHECKLIST

1. Capture a permitted transcript with usable speaker labels.
2. Remove unnecessary sensitive information.
3. Open a fresh conversation in an approved AI assistant.
4. Paste the saved Meeting-to-Action Prompt and transcript.
5. Check all five sections against direct evidence.
6. Complete partial dates and convert relative dates only after verifying the meeting date, year, and time zone.
7. Assign unresolved work instead of letting the AI invent an owner.
8. Confirm actions, conditions, and authority with the people involved.
9. Share only the corrected record according to organizational policy.

Add a control header

Before saving or sharing the checked record, add enough context for another person to understand its source and status.

FIELD	WHAT TO RECORD
Meeting	Meeting name or purpose
Meeting date and time zone	The verified date and relevant time zone
Source	The approved location or identifier for the transcript
Prepared by	Person who generated and edited the candidate record
Checked by	Person who compared it with the source
Status	Draft, checked, or shared
Last updated	Date of the most recent human revision

Move confirmed actions into the system where work is tracked

After owners have confirmed the checked record, transfer approved actions into your organization's task, project, ticket, or calendar system. Carry over the owner, specific next step, verified due date, and dependency. Include a permitted reference to the checked record when useful.

Do not automatically create or assign tasks from an unchecked AI output. Extraction is not acceptance, and a transcript mention is not always authorization to place work on somebody's calendar or task list.

09 Finish line

You are finished when you have a checked execution record—not merely an AI summary.

FINISH LINE

- The record separates confirmed decisions from proposals, deferred choices, and rejected ideas.
- Every action has a confirmed owner or is visibly unassigned.
- Conditions and dependencies remain attached to the relevant action.
- Dates are exact, or their missing information is clearly marked.
- Evidence has been checked against the transcript.
- Another attendee has reviewed the important decisions and commitments.
- The final record has a source, reviewer, status, and last-updated date.
- Confirmed actions have been placed in the approved system where work is tracked.
- The reusable prompt and review checklist are saved for the next permitted meeting.

The goal is not to make AI sound certain. The goal is to produce a record that helps people act without hiding what still needs human judgment.

Turn the next permitted meeting into checked next moves

Run the workflow on one low-stakes meeting, verify every claim against the source, confirm the commitments with the people involved, and save the corrected record where your team tracks work.

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From meeting transcript to accountable action