



AI Time Management

Meeting Summary & Follow-Up Guide

Use this quick guide to apply AI tools before, during, and after meetings for maximum clarity and efficiency.



Before the Meeting

- Generate a meeting agenda based on this email chain
- Summarize prior meeting notes into 3 key points
- Create a one-line objective for today's session
- Suggest who should attend based on this context.



During the Meeting

- Live-capture discussion points using Zoom AI or Teams Copilot
- Highlight decisions made and action items assigned
- Label responsibilities clearly: [Name] - [Task] - [Due Date]
- Track time allocation per agenda item.



After the Meeting

- Summarize the meeting in 5 bullet points and 3 actions
- Draft follow-up email: recap + next steps + due dates
- Create tasks in Notion, To Do, or Google Tasks
- Send recap to team with links to relevant docs or recordings.



Sample Prompts

- Summarize the meeting in 5 bullet points and 3 actions
- Turn this discussion into a client-facing update
- Assign tasks to each team member from this Zoom call
- What are the action items and who owns them?



AI-Enhanced Meeting Agenda & Action Tracker

Plan Smarter Meetings, Capture Key Outcomes, Drive Action



Meeting Details

Meeting Title	
Date & Time	
Location / Link	
Facilitator / Chair	
Participants	



Pre-Meeting Preparation

(List any documents to review, tasks to complete, or decisions to make.)

Task	Owner	Deadline
1.		
2.		
3.		

Tip: Use AI tools like Zoom AI, Teams Copilot to pre-scan background material and suggest preparation tasks.



Meeting Agenda

Time	Topic	Lead Presenter	Goal (Decision, Brainstorm, Update)
00:00–00:10	Welcome + Objective Setting	Facilitator	Clarify meeting purpose
00:10–00:30	Discussion Topic 1		
00:30–00:50	Discussion Topic 2	Facilitator	Assign tasks and deadlines
00:50–01:00	Action Summary and Next Steps		

Tip: Gemini or Copilot can summarize these topics automatically during or after the meeting



Key Decisions Made

(Summarize what decisions were made during the meeting.)

No.	Decision	Context / Notes
1.		
2.		
3.		



Action Items and Owners

(List tasks assigned during the meeting.)

No.	Action Item	Assigned To	Due Date
1.			
2.			
3.			

*Tip: Assign ownership and deadlines clearly **during** the meeting - not afterward.*



Post-Meeting AI Follow-Up Checklist

- ✓ Use Zoom AI Companion, Teams Copilot, or Otter.ai to:
 - Summarize meeting key points automatically
 - Send Action Items to participants
 - Update team project boards or task management apps
- ✓ Check meeting goals against outcomes
- ✓ Confirm all action items are visible and trackable



Benefits of an AI-Enhanced Meeting Tracker

- **Shorter, more productive meetings**
- **Clear task ownership and accountability**
- **Immediate next-step clarity for all participants**
- **Better meeting-to-action conversion**

✓ Result:

Meetings become **focused decision-making sessions**, not unproductive talkfests.