Session 2 Handout: Meetings

FAST-04 AI Productivity with Microsoft Copilot and Google Gemini · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

A good recap turns a meeting into action. A bad one assigns work to the wrong person, records a decision nobody made, or moves a deadline, and everyone trusts it because "the AI took the notes." This session covers what to ask for, when transcription is appropriate, and how to verify every line.

Key concepts

1. What to ask for

Section	Content	Common error
Decisions	Only items explicitly agreed	Items that were *discussed* recorded as decided
Action items	Owner, action, due date	Wrong owner (the person who raised it, not the one who took it); wrong or vague date
Open questions	Raised, not resolved	Omitted or turned into decisions

Name the reader (team, manager, client) and keep it short: short recaps are easier to check. Add: "If an owner or date wasn't stated, write 'not stated.'"

Tools: Copilot in Teams (recap and in-meeting questions, typically needing transcription or recording on) and Gemini in Meet ("Take notes for me," which creates a notes doc). Availability depends on license and admin settings.

2. Transcription and consent

- Transcripts and recordings are **business records**: they can be retained, searched, and reviewed.
- **Massachusetts** prohibits secretly recording conversations (G.L. c. 272, §99). Make sure everyone knows and agrees, and follow your employer's policy. *Training, not legal advice.*
- Typically off-limits: HR and disciplinary meetings, legal matters, sensitive customer conversations, anything with health information.
- When in doubt, take manual notes. The assistant can structure your notes into decisions, owners, and dates if policy allows.

3. Verifying the recap

For every line: find it in the transcript or your notes. Mark it:

Correct · Wrong owner · Wrong date · Discussed, not decided · Not in meeting

Convert relative dates ("Thursday," "next week") to calendar dates. Send only the checked version.

4. From recap to tasks

Turn actions into tasks in Planner/To Do (Microsoft) or Google Tasks, with owner, due date, and a link back to the recap. Confirm the owner agreed. Don't assign tasks to people who weren't there without asking. Review open tasks at the next meeting.

Worked example: Merrimack Freight ops meeting (Mon Oct 5)

AI recap line	Mark	Evidence	Correction
Decision: add a second truck to Nashua	Discussed, not decided	"No decision until we see quotes"	Open question; action: Priya quotes by Wed Oct 7
Decision: freeze overtime for Q4	Not in meeting	Never mentioned	Delete
Luis to update dock schedule by Thursday	Wrong owner (and relative date)	"DANA: I'll take the dock schedule. Thursday."	Dana, by Thu Oct 8
Priya to request quotes by Wed Oct 7	Correct	Matches	n/a
Dana to send safety sign-ups by Oct 30	Wrong date	"sign-ups due the 16th"	By Oct 16
Open: Billerica lease renewal	Correct	"Let's think about it"	n/a

Five errors in six lines, and it *looked* fine.

Checklist: recap ready to send

- ☐ Transcription allowed by policy; everyone aware and agreed.
- ☐ Decisions only if explicitly agreed.
- ☐ Every action has owner and calendar date (or "not stated").
- ☐ Every line traced to transcript or notes.
- ☐ Tasks created with links; owners confirmed.

Do and don't

Do	Don't
Announce transcription in the invite and at the start	Turn it on quietly
Keep HR and sensitive meetings off the record	Transcribe "everything just in case"
Mark every line before sending	Forward the raw AI recap
Ask for "not stated" owners and dates	Let the AI guess owners

Do	Don't
Link tasks to the recap	Create tasks with no source

Try this at work

1. List your recurring meetings and check which may be transcribed under policy.
2. For one allowed meeting, generate a recap and mark every line.
3. Count errors by type; add one prompt rule to fix the most common.

Glossary

Term	Meaning
Recap	Structured summary: decisions, actions, open questions
Action item	Task with owner and due date
Transcription	Converting speech to text; creates a record
Consent	Everyone's awareness and agreement to recording
Relative date	"Thursday," "next week": needs converting to a calendar date

Key takeaways

- Ask for decisions, owners, dates, plus open questions.
- Consent and policy before recording.
- Verify every line; owners and dates fail most.