Meeting Notes Automation Kit

Standing instruction block + meeting types + the three-trap review

The system at a glance

Capture (messy notes or consented transcript) → AI with your standing block → three-trap review → distribute within the hour → archive in one searchable place. Your live task is six minutes of review.

Consent rule

Never record or transcribe a meeting without participants' knowledge and agreement. Laws differ by region; trust matters everywhere. Announce it, get agreement, make it normal — or use messy live notes instead.

The four meeting types

Status / stand-up	Progress, blockers, changes	Action items + blockers — summary can be 3 bullets
Decision	Options, the decision, who, why	The decision plainly + what was NOT decided
Brainstorm	Every idea, grouped, judgment-free	Idea inventory — no action items unless truly committed
One-on-one	Agreements, feedback, follow-ups	Short + discreet — heavier review before sharing

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Your standing instruction block — write once, reuse forever

MEETING TYPE LINE (status / decision / brainstorm / one-on-one):

MY ROSTER + ROLES (the ingredient that never changes):

MY RULES (start with: only real commitments · never invent — write ASK · ideas go to FLAGGED):

MY FORMAT + STANDARD (Summary / Action Items / Flagged · under 250 words · posted within 1 hour):

RULES ADDED BY MY REVIEW CATCHES (the block gets smarter — date each one):

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Three-trap review + archive setup

The three-trap review ★ (six minutes, in this order)

1 · WRONG OWNERS

"Dana mentioned the budget" is not "Dana owns the budget task." Check every owner.

2 · PROMOTED IDEAS

Floated ideas are not commitments. Demote anything nobody actually took.

3 · LOST NUANCE

"Team agreed" when the room was split? Check anything sensitive before it becomes the record.

Archive setup (one-time, 5 minutes)

- [ ] Create ONE place — a folder or a single running doc — where every processed meeting lands
- [ ] Name entries the same way every time: date · meeting type · topic
- [ ] Test the payoff: search for a decision from last month — thirty seconds, not a re-litigated meeting

Time log

MEETING	WRITING TIME BEFORE	REVIEW TIME NOW

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What to do with this document

Your next steps

- [ ] Write your standing block (page 2) and save it with your Reply Library
- [ ] Run the system on three real meetings this week — correct meeting type declared each time
- [ ] After each review, add what you caught as a new rule on page 2
- [ ] Set up the archive — the asset that compounds

Keep going (free)

Every lesson of the Automation Academy is free at braintrain-ai-academy.com/automation-academy — problems first, tools second. This worksheet feeds directly into the next lesson of the module.

A NOTE FOR LATER

Later in this academy, documents like this one become your Automation Blueprint — a written plan of everything you want built. You can build it yourself with what these lessons teach. And if you would ever like help designing it around your specific situation, BrainTrain AI Coach can guide you step-by-step. For now: run the worksheet. That is the whole assignment.