

◆ OPEN-SOURCE AI PLAYBOOK · FOR EVERY TEAM

Meeting-to-Action

Decisions get made in meetings and forgotten by Friday.

THE SYSTEM

Turns every call into notes, owners and deadlines, updates the tracker and drafts the follow-ups.

🕒 BUILD TIME

2-3 days

🔧 HOW IT'S BUILT

No-code

🔌 WORKS WITH

Zoom or Meet +
Google Workspace or
Microsoft 365

👤 OWNER

Ops lead, or whoever
runs the team's
recurring meetings

How it works: it highlights the call, then files what it marked

1 The transcript

Pricing sync · Larkspur, a fictional company

Maya Okay, pricing. We go annual-first, and the free tier comes off the comparison table.

Maya Dev, can you send Cobalt Freight the revised quote by Thursday?

Dev Lena, could you update the pricing page mockups before Monday's review?

Tom The launch moves to 3 November, so the announcement goes out that week.

Maya Tom, please tell the support team about the new date by Friday.

2 What it pulls out

Decision Action Owner Deadline

DECISION Pricing page goes annual-first. The free tier comes off the comparison table.

ACTION Send Cobalt Freight the revised quote
Dev Patel Thu 22 Oct

ACTION Update the pricing page mockups
Lena Ortiz Mon 26 Oct

DECISION Launch moves to 3 November.

ACTION Tell support about the new launch date
Tom Reyes Fri 23 Oct

3 The meeting owner checks the list in Slack: edit, drop or approve. Nothing is filed before that.

[You sign off](#)

4 Your tracker, updated

Send Cobalt Freight the revised quote	Dev Patel	Thu 22 Oct
Tell support about the new launch date	Tom Reyes	Fri 23 Oct
Update the pricing page mockups	Lena Ortiz	Mon 26 Oct

📌 **Decision log:** annual-first pricing · launch on 3 November

4 The follow-up, drafted

Pricing sync: 2 decisions, 3 actions

Hi all, here's what we agreed today. Decided: the pricing page goes annual-first, and the launch moves to 3 November...

[Send](#) Waits in the owner's drafts. A person sends it.

When it isn't sure, it asks

"Someone should look at the churn numbers before the board meeting."

🔍 **No owner named: Who takes it?**

"Let's get the new deck out to the partners soon."

🔍 **No date given: When is it due?**

"We could maybe drop the monthly plan altogether."

🔍 **Sounds undecided: Log it as a decision?**

Sample lines, fictional company.

The build: two to three days

Day 1 • Connect

Recordings and transcripts from Zoom or Meet, your tracker, and a Slack or Teams channel for the review step.

Day 2 • Teach it

Write the rules for what counts as a decision or an action, and test them on ten past calls.

Day 3 • Go live

Turn it on for one recurring meeting. The meeting owner checks every list for the first two weeks.

Can we build it? FOR YOUR TECH LEAD

🔌 Tools you'll use

The transcript	Zoom or Google Meet's own transcripts (paid plans)	or Fireflies, Otter, Fathom
Running the steps	n8n	or Make, Zapier
Finding decisions and actions	Claude (API)	or ChatGPT, Gemini
The review step	A Slack message with approve and edit buttons	or a Teams Adaptive Card
The tracker	Asana	or Notion, Jira, Trello, a Google Sheet
The follow-up email	A Gmail draft	or an Outlook draft

🔧 Three ways to build it

Start simple 1-2 hours

Turn on your meeting tool's transcripts and paste each one into a saved Claude or ChatGPT project that lists decisions, owners and dates.

Production 2-3 days

n8n picks up each new transcript, Claude pulls out the items, the owner approves them in Slack, then tasks go to Asana and a Gmail draft is created.

Custom 1-2 weeks

Adds name and project matching from the Company Brain, reminders before due dates, and last week's open items at the top of each call.

🔒 Access it needs

- ◆ Transcripts for the meetings the owner switches it on for, and nothing else
- ◆ Permission to create tasks in one tracker project
- ◆ Permission to create drafts in the meeting owner's mailbox, not to send
- ◆ Your team list from the Company Brain, to match names to people

🛡️ Guardrails

- ◆ Nothing is filed until the meeting owner approves the list
- ◆ Follow-ups are drafts; a person always presses send
- ◆ Items without a clear owner or date are flagged, never guessed
- ◆ Only meetings people know are recorded; 1:1s, HR and legal calls are off by default

🎯 What to measure

- ◆ Time from the end of the call to the follow-up going out
- ◆ Share of actions with both an owner and a date
- ◆ Actions done by their due date
- ◆ Edits the owner makes per meeting, which should fall over time

👤 Who builds and runs it

An ops lead or chief of staff sets it up with someone comfortable in n8n, in two to three days. After that, each meeting owner spends a couple of minutes per call checking the list and sending the email.

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

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Pallav Kaushish

Co-Founder, AIXGrowth

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