

Meeting notes become actions, a follow-up email and a CRM-ready note

You practise this in the course

Actions

Action	Owner	Due
Send pricing for 25 seats	Account manager	Thursday
Confirm who signs off the renewal	Account manager	Next call
Book the review call	Account manager	28 May

TO Operations director, Coastal Freight

SUBJECT Pricing for May and next steps

Thanks for the time today. As promised, I'll send pricing for 25 seats by Thursday.

I've pencilled in a call for 28 May to go through onboarding for your new starters.

Could you let me know who will sign off the renewal, so we can include them?

CRM note (to paste into your own system)

- Renewal, 25 seats; new starters expected in May.
- Next step: review call on 28 May.
- Open: confirm who signs off.

YOU START WITH

Rough notes typed during a renewal meeting.

WHAT YOU PRACTISE

Turning meeting notes into actions with owners and dates, a follow-up in your own voice and a short CRM note.

THE PROMPT USED

"From these anonymised meeting notes, list actions with owner and date, draft a short follow-up email in my voice, and write a three-line CRM note: stage, next step, open question."

THE FINISHED OUTPUT CONTAINS

- Actions with an owner and a date
- A follow-up email ready to edit and send
- A three-line CRM note in the team's format

STILL NEEDS HUMAN CHECKING

- Dates and commitments match what was agreed
- The email sounds like you
- Personal details removed before using an AI tool

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Note: The CRM note is text you paste into your own system. Nothing here connects to or updates a CRM.