

Meeting Prep & Notes

Before, During, After — The Complete Framework

WORKSHOP

Reclaim Your Workweek Workshop

EVENT

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PRESENTED BY

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The Real Cost of Bad Meetings

The average worker sits in 8 meetings/week. That's 416 hours/year. At \$50k salary, each meeting costs your company \$100. A disorganized 1-hour meeting with 5 people? That's \$500 gone. Add poor prep, unclear decisions, no follow-up, and you've wasted \$2,500+ on something that could have been an email.

Before You Schedule: The Async Question

Not every conversation needs synchronous time. Ask yourself:

- Is this information delivery? >> Async (Loom, doc, email)
- Do we need live discussion? >> Meeting required
- Are we making a decision? >> Real-time sync recommended
- Are we brainstorming? >> Meeting recommended
- Is this status? >> Async wins 90% of the time

The Meeting Hierarchy

Not all meetings are equal. Below is the decision tree that tells you WHICH meeting type solves YOUR problem.

Meeting Type Decision Tree

Start at the top. Answer one question per level. Your answer tells you the meeting type and structure you need.

QUESTION 1: What's the conversation outcome?

- Just syncing updates >> QUICK SYNC
- Working through a problem together >> WORKING SESSION
- Planning future direction >> STRATEGY SESSION
- External party involved >> CLIENT MEETING

QUESTION 2: How much alignment do you need?

- Just heads up (1-2 people) >> QUICK SYNC (15 min)
- Team on same page (2-4 people) >> QUICK SYNC (15-20 min)
- Cross-functional work (4+ people, complex) >> WORKING SESSION (45-60 min)
- Org-level direction (leadership, budget, strategy) >> STRATEGY SESSION (60-90 min)

QUESTION 3: Is a decision needed?

- No decision needed, just sync >> QUICK SYNC or ASYNC
- Minor decision (small scope) >> QUICK SYNC or WORKING SESSION
- Major decision (impacts multiple teams/timeline) >> STRATEGY SESSION or CLIENT MEETING
- Approval from stakeholder not present >> Escalate to STRATEGY SESSION or async decision doc

ESCALATION RULE: When in doubt, go UP, not sideways. A 15-min quick sync that should've been a working session wastes everyone's time. If you feel unclear about outcome halfway through, pause, and reschedule as the right meeting type.

Meeting Type Profiles & Structures

1. QUICK SYNC (15 minutes)

Status update, rapid decision, alignment call, or heads-up conversation.

When to use:

- Team standup
- Brief update on project status
- Quick approval or green-light
- Scheduling next meeting

Structure (15 min):

- Opening (1 min): State the purpose
- Discussion (10 min): Updates or decision
- Close (2 min): Action items, next steps
- Prep time needed: 2 minutes

After the meeting: 2-min recap email

QUICK SYNC TEMPLATE

Subject: [Project/Topic] - Sync recap

Hi team,

Quick recap from today:

- [Update 1]
- [Update 2]
- [Decision made]: [What we decided]

Next: [One action item or next meeting]

-- Reu

2. WORKING SESSION (30-60 minutes)

Collaborative work. Problem-solving. Brainstorming implementation. Building something together in real-time.

When to use:

- Design sprint or workshop
- Resolving a blockers across teams
- Drafting strategy or plan collaboratively
- Training or knowledge transfer

Structure (45 min example):

- Intro (3 min): Problem statement, goals
- Context (5 min): Constraints, background
- Work (30 min): Active collaboration
- Decision (5 min): What we're doing next
- Close (2 min): Owners, deadlines

Prep required:

- Share context doc 24h before
- Draft agenda with time blocks
- Have reference materials ready

WORKING SESSION TEMPLATE

Subject: [Project] - Session notes + next steps

Team -- here's what we worked through:

PROBLEM: [What we were solving]

SOLUTION: [What we decided]

OWNERS: [Who's doing what]

DEADLINE: [When]

Next session: [Date/time if continuing]

Questions? Reply in Slack thread.

3. STRATEGY SESSION (60-90 minutes)

High-level direction, budgets, org priorities, long-term planning. Leadership and decision-makers present. Outcome is a DECISION, not just alignment.

When to use:

- Q-planning or annual strategy
- Major hiring or budget decision
- Org restructure or process change
- Investment in new tool or system

Structure (75 min example):

- Context (10 min): Market, constraints, why now
- Options (20 min): 2-3 strategic directions
- Discussion (30 min): Pros/cons, concerns
- Decision (10 min): What we're committing to
- Close (5 min): Comms plan, next steps

Prep required:

- Written brief 48h before (1-2 pages)
- Decision-maker's agenda items to them 24h early
- Have data: costs, timeline, resource needs

STRATEGY SESSION TEMPLATE

Subject: [Strategic Decision] - FYI + decision document attached

Leadership team -- decision made in today's session:

DECISION: [What we're doing]

RATIONALE: [Why this over alternatives]

BUDGET IMPACT: [Cost or savings]

TIMELINE: [When we start]

NEXT STEP: [Who communicates this]

See attached brief for full context. Questions: meeting required.

4. CLIENT MEETING (varies: 30-60 min typical)

External stakeholder, prospect, or long-term client. Goals: build trust, gather requirements, or deliver results.

When to use:

- Discovery or needs assessment
- Proposal walkthrough
- Project checkpoint or delivery review
- Contract negotiation

Structure (varies by type):

Discovery Meeting (45 min):

- Warm-up (5 min): Small talk based on relationship (exec: formal, SMB owner: casual)
- Their world (15 min): Listen to problems, goals, constraints
- Our fit (15 min): How we can help (if relevant)
- Next (10 min): What happens next, timeline

Delivery/Checkpoint (30 min):

- Recap (3 min): What we said we'd do
- Show (20 min): Here's what we built, why, how it works
- Feedback (5 min): What do you think? Any changes?
- Close (2 min): Next steps, timeline

CLIENT MEETING TEMPLATE

Subject: [Project/Topic] - Thank you + here's what we discussed

Hi [Client name],

Thanks for taking time to chat today. Here's what we covered:

YOUR GOALS: [What they told you]

OUR PROPOSAL: [What we suggested]

NEXT STEP: [What you're doing next, by when]

Questions? I'm [method + timeline for response].

Looking forward to working with you.

-- Reu

Complete Meeting Lifecycle

BEFORE THE MEETING (prep framework)

1. Create the Agenda (3 min)

- Outcome statement: 'By end of this meeting, we will [do/decide] X'
- Time blocks: List agenda items with minutes
- Context: Link to docs people should read
- Decisions needed: Flag which items need a call, which can be async

2. Prep Materials (5-10 min)

- Slides or doc (if presenting): Share 24h before if possible
- Data: Have numbers, quotes, research ready
- Decision framework: If approving something, show clear criteria (cost/time/impact)
- Reference docs: Links to context, previous decisions, standards

3. Block Time (logistics)

- Prep: Book 15 min before meeting (agenda + quick mindset)
- Follow-up: Block 10 min AFTER meeting (immediate recap)
- This protects you from back-to-back trap

AI PROMPT: PRE-MEETING RESEARCH

I'm about to meet with [person/team]. Here's what I know: [context]. Generate 3 questions I should ask and 2 pieces of context I should share to move this conversation forward.

DURING THE MEETING (facilitation)

Start Strong (first 1 min):

- Welcome: 'Thanks for making time'
- Outcome: 'Our goal is X. Here's how long we'll spend'
- Agenda: Quick run-through of topics

Take Notes (ongoing):

- Use template below (decisions + action items)
- Assign live: Name the owner, confirm the deadline during meeting
- If topic not resolving: Pause, propose moving it, assign owner to think it through async

DURING-MEETING NOTE TEMPLATE

[DATE] | [ATTENDEES]

TOPIC 1: [Agenda item]

Decision: [What did we decide?]

Owner: [Who], Due: [When]

TOPIC 2: [Next item]

Decision: [...]

Owner: [...], Due: [...]

PARKING LOT: [Deferred to X or async discussion]

Close Strong (final 2 min):

- Recap decisions: 'Here's what we decided'
- Confirm owners: 'Alice is X by Friday, Bob is Y by Wednesday'
- Next step: 'Here's what happens next'

AI PROMPT: CLEANUP NOTES

I took these meeting notes [paste]. Clean them up into: DECISIONS | ACTION ITEMS (with owner + deadline) | PARKING LOT. Format as: Decision: X. Owner: [person]. Deadline: [date].

AFTER THE MEETING (follow-up framework)

Step 1: Immediate Recap (5 min, right after)

- Review notes while fresh
- If decision was unclear, send 1 message: 'Just to confirm: we're doing X, right?'
- Add dates and deadlines if missing

Step 2: Send Follow-Up (within 2 hours)

Use the template for your meeting TYPE (see above). Include:

- Meeting title and date
- Attendees
- Decisions made (crystal clear)
- Action items (Owner + Deadline for each)
- Next step (if any)

AI PROMPT: FOLLOWUP EMAIL

Write a professional followup email for a [TYPE] meeting. Decisions: [list]. Action items: [list]. Make it concise, action-focused, no fluff. Tone: [casual/formal].

Step 3: Track Action Items

You own making sure things happen. Three days before deadline:

- Check status: 'Hey Alice, on track for your Friday deadline?'
- If stuck: 'What's blocking you? How can I help?'
- If done: Acknowledge in person (quick thanks)

Meeting Tracking Template:

- Tool: Use Slack, Asana, Google Sheets, or email
- Minimum: [Date] | [Action] | [Owner] | [Deadline] | [Status]
- Review weekly: Every Friday, check what's due next week

Meetings Gone Wrong: The Fix

PROBLEM: Meeting ran over (nothing decided)

This kills productivity. The fix:

In the moment:

- At +2 min over: 'We're over time. Let's pause and decide: do we keep going or reschedule this item?'
- If continuing: Set hard stop time
- If deferring: Assign owner to think through offline

Follow-up:

- Email recap names the decision you DID make
- For deferred topics: 'Alice will think through options, we'll discuss Thursday'

PROBLEM: Meeting went off-topic

Common. Fix in real-time:

Redirect script:

- 'That's a great point, but let's park it. It's [X topic], and we came to discuss [Y]. Let's assign someone to tackle X, then move on.'
- Assign the tangent to someone (async research, or next meeting)

PROBLEM: No decisions made (conversation went in circles)

This is a meeting design failure. You need a decision framework. In the moment:

Decision-forcing protocol:

- 'I want to make sure we leave with clarity. Here are the 2 options: [A] or [B]. Pros and cons:'
- Lay them out quickly (30 sec each)
- 'Which way do we go? Heads-up or gut check?'
- Decide. If 50/50: decision-maker speaks final word
- Call it: 'We're doing X. Here's why. Next step is Y.'

DECISION FORCING TEMPLATE

Option A: [What], Why: [Benefits], Costs: [Tradeoffs]. Option B: [What], Why: [Benefits], Costs: [Tradeoffs]. Recommendation: [X] because [reason]. Team consensus? Yes/No.

PROBLEM: Back-to-back-to-back meetings all day

Survival is the goal. You can't do deep work between meetings. Here's the protocol:

The 2-Minute Recap Protocol:

- Between each meeting: 2-min pause
- Open your notes, read what happened
- Send 1-sentence recap to attendees (if action items)
- Close the doc, open the next meeting

Batch all follow-ups (daily):

- At 4pm: Send all follow-ups at once
- This prevents context-switching hell
- Set a daily reminder: '4pm: Batch meeting follow-ups'

DAILY MEETING AUDIT

Run every Friday:

- How many meetings did I sit in?
- Of those, how many had clear outcomes?
- Which 2-3 could have been async?
- Did every action item get assigned?
- Did follow-ups go out same-day?

If you say NO to any, block 30 min next week to fix.

Skip the Meeting: Async Playbook

70% of meetings could be async. Here's how to know which ones, and how to execute them.

Async Decision Framework

Use async when:

- No live discussion needed (just decision)
- Participants are spread across time zones
- Topic is low-urgency but needs input (48h+ deadline)
- Outcome is a yes/no or approval

Don't use async when:

- Real-time brainstorm needed (working session)
- Major conflict exists (needs discussion)
- Tight deadline (less than 6 hours)

Async Delivery Methods

Option 1: Loom Video (2-5 minutes)

Best for: Explaining something complex, demo, feedback on work

- Record your screen or face
- Keep it short: 'Here's what, why, what I need from you'
- Give deadline for response: 'Reply by Thursday EOD'

Option 2: Shared Document + Slack Thread

Best for: Proposal, decision point, collaborative input

- Draft document with options/context
- Post in Slack: 'Need input on X by Friday'
- Tag specific people for decisions
- Set a discussion window (48-72 hours)

Option 3: Email + Structured Prompt

Best for: Update, approval, brief decision

- Subject line is the ask: '[DECISION] Approve X?'
- Body: Context, options, deadline
- Example: '[DECISION] Approve new vendor fee (\$5k/mo) by Friday 5pm?'

ASYNC HANDOFF TEMPLATE

Subject: [DECISION or UPDATE] [What you need]

Hi team,

CONTEXT: [Why you're asking]

OPTIONS: [A: ..., B: ..., C: ...]

RECOMMENDED: [I think A because...]

YOUR INPUT: [What you need from them]

DEADLINE: [By when, what happens next]

Questions? Slack or reply here.

AI PROMPT: ASYNC DECISION DOC

Create an async decision document for [topic]. Include: Context (why now), 2-3 options with pros/cons, recommendation with reasoning, and a clear decision deadline. Format for Slack thread or doc comment.

Calendar Strategy: Time Blocking for Meetings

Meetings expand to fill available time. You need to architect your calendar, not react to it.

The Meeting Block Template (on your calendar)

Before the meeting:

- 15 min prep block (titled '[MEETING NAME] prep')
- Review agenda, skim context, mindset prep
- Set intention: 'What's my role here? What decisions do we need?'

The meeting itself:

- Scheduled time (with 5-10 min buffer before next item)

After the meeting:

- 10 min follow-up block (titled '[MEETING NAME] recap')
- Send recap email, update tracking doc
- This prevents 'I meant to send that' excuses

Example calendar (if you have a 2pm meeting):

- 1:45-2:00pm: Prep (agenda, docs, mindset)
- 2:00-2:45pm: Meeting
- 2:45-2:55pm: Recap (email, action items, tracking)
- 3:00pm: Next meeting or deep work

RULE: If a meeting doesn't have prep + follow-up time blocked, it will leak into your day. People will ask 'Did you send that recap?' and you'll scramble. Block the time upfront.

Weekly Meeting Audit

Every Friday, review. If you don't, you'll keep defaulting to 'just have a meeting' instead of asking 'do we need this?'

WEEKLY MEETING REVIEW

This Friday, audit this week's meetings:

- Total hours in meetings: ____ (Healthy: <25% of week)
- Meetings with clear outcomes: ____ (Target: 100%)
- Meetings that ran over: ____ (Healthy: 0)
- Decisions made in sync (not async): ____ (Good: <50%)
- Follow-ups sent same-day: ____ (Target: 100%)

Next week: Experiment -- make 1-2 recurring meetings async.

Meeting Scaling: When to Escalate

As your org grows, 1-on-1 meetings don't scale. You need decision-making processes, not more meetings.

Escalation Logic: When Do You Move Up?

Quick Sync >> Working Session

- When: 1-2 syncs reveal deeper misalignment
- Signal: 'We keep circling back to X'
- Move to working session: '15-min syncs aren't enough. Let's block 45 min to work through this.'
- Cadence: Once (or as-needed), not recurring

Working Session >> Strategy Session

- When: Work session requires budget, timeline, or org-level decision
- Signal: 'This impacts other teams' or 'We need to allocate resources'
- Move to strategy: 'We need leadership + decision-maker. Let's do a formal strategy session.'
- Cadence: Less frequent (quarterly planning, major decisions)

Strategy Session >> Org Announcement

- When: Decision is made and needs org-wide communication
- Signal: Strategy session is done, decision is firm
- Move to announcement: Email + optional all-hands Q&A
- Purpose: Align everyone without another meeting

Meeting Scaling Architecture (by team size)

3-5 person team:

- Weekly standup (quick sync, 15 min)
- Monthly strategy check-in (1 hour)
- Ad-hoc working sessions as needed

6-12 person team:

- Weekly standups (by subteam, 15 min each)
- Bi-weekly all-hands (15-30 min, async update + questions)
- Monthly strategy session (1 hour, leaders)
- Working sessions for cross-functional work (scheduled as needed)

13+ person org:

- Weekly standups (team, 15 min)
- Bi-weekly all-hands (30 min, async + live Q&A)
- Quarterly strategy sessions (2-3 hours, leadership)
- Monthly 1:1s (manager + direct, 30 min)
- No meeting cascades -- use docs and async)

MEETING AUDIT: DO WE NEED THIS?

For each recurring meeting: Is this decision/alignment? Can it be async? Who benefits? If <75% of attendees said 'this was useful' last month, make it async.

AI Prompts: Speed Up Meeting Workflow

Pre-Meeting Research

RESEARCH PREP

I'm meeting with [person/team] on [date] to [discuss/decide] X. We last talked about [context]. Generate 3 smart questions I should ask and 2 pieces of context they should know about.

Agenda Creation

AGENDA BUILDER

Create a meeting agenda for [meeting type]. Outcome: [what we want to accomplish]. Attendees: [who]. Time available: [how long]. Include: purpose, agenda items with time allocations, decision points, context to pre-read.

Notes Cleanup

NOTES CLEANUP

Clean up these meeting notes into a concise recap: [paste notes]. Format: TOPIC | DECISION | OWNER | DEADLINE | PARKING LOT. No fluff, crystal clear.

Follow-Up Email (Automated)

FOLLOWUP EMAIL

Write a [TYPE] meeting recap email. Topic: [X]. Attendees: [list]. Decisions: [list]. Action items: [owner: deadline for each]. Tone: [professional/casual]. Keep it brief.

Decision Forcing

FORCE A DECISION

We're stuck between [Option A] and [Option B]. Here's what we know: [context]. Create a decision matrix (costs, timeline, risk, upside) for each option. Recommend one and explain why.

Meetings Connect to Everything Else

You don't live in a meeting vacuum. Meetings touch email, decisions, client communication, and execution. Here's how they connect:

Meetings >> Email Triage

Meetings create action items. Those become emails/Slack messages. See [Email Triage System](#) for managing the follow-up chaos.

- Follow-up emails are sent same-day (use our template)
- If action items are stuck, escalate via email
- Track emails by owner + deadline (3-day reminder before due)

Meetings >> Client Communication Hub

Client meetings require different prep, pacing, and follow-up. See [Client Communication Hub](#) for discovery calls, proposal meetings, delivery check-ins.

- Discovery meetings: Use the 45-min structure (listen-focused)
- Delivery meetings: Use show+feedback format (30 min)
- Follow-ups are phone-friendly (text > email for next steps)

Meetings >> 4D Decision Tree

When meetings don't have clear decision logic, they derail. See [4D Decision Tree](#) for frameworks that make decisions fast and clear.

- In meetings: Use the decision tree if you're stuck
- For async decisions: Share the decision tree doc + ask input
- Post-meeting: Document decisions using 4D framework

Meetings >> Execution

Meetings are only useful if they lead to action. Track action items in your system (Asana, Notion, Slack, spreadsheet).

- Daily: Check on action items due this week
- Weekly: Review what happened and what didn't
- Monthly: Spot patterns (what keeps coming up in meetings?)

Meeting Mastery Checklist

The Goal: Run 50% fewer meetings, make better decisions, in less time.

Before you schedule your next meeting, use this checklist:

- 1 Is this async? (Can it be an email, Loom, or doc?)
- 2 Do we have a clear outcome? (Not 'discuss X', but 'decide X by 3pm')
- 3 Who really needs to be there? (Remove everyone else)
- 4 Is prep time blocked? (15 min before, 10 min after)
- 5 Is the decision-maker coming? (Or are we wasting time?)
- 6 Do we have an agenda with time blocks?
- 7 Is follow-up planned? (Who sends recap, by when?)

The winning move: Make meetings rare, short, and decisive. Use async for updates. Use sync only for real-time collaboration or decisions that need discussion. Your calendar will thank you.

This guide is dense. Use it to design your meetings, train your team, and audit your process. Return to this whenever:

- You're scheduling a meeting and unsure what type
- A meeting went sideways and you need recovery steps
- You want to cut your meeting load in half
- You're onboarding someone new to your team

Do the Meeting Audit with your team. Pick 1-2 recurring meetings to make async. Track time saved.

AI Prompt Index

All AI prompts in this guide, organized by meeting phase. Copy-paste into Claude, ChatGPT, or your LLM of choice.

Prompt Name	Use When	Page
Pre-Meeting Research	Preparing for a meeting with new contact	7
Agenda Builder	Creating structured agenda with time blocks	12
Notes Cleanup	Organizing messy meeting notes into decisions	9
Follow-Up Email	Writing recap email same-day	9
Force a Decision	Breaking tie between options in real-time	10
Async Decision Doc	Creating decision document for async feedback	13
Meeting Audit	Evaluating if a recurring meeting is necessary	14

Pro tip: Save your favorite prompt variations as templates in your notes app. You'll run them 50+ times this month.