WORKED EXAMPLE

From notes to a checked recap

Fictional project. Oak Studio is preparing a welcome guide for its customers.

Source note	How it should appear
Sam agreed to draft a one-page welcome guide. No date was agreed.	Action. Sam owns the draft. Ask for a delivery date.
Jordan agreed to supply approved screenshots by Wednesday.	Action. Preserve Jordan and Wednesday.
Casey suggested adding an FAQ. The group did not decide.	Open question. Ask whether the FAQ belongs in scope.
Sam asked whether Friday could be launch day. The team needs to check.	Open question. Ask whether Friday is workable.
The guide will use the existing signup form.	Decision. The existing form is the agreed approach.

The checked email

Subject — Welcome guide recap and open questions

Hi team,

We agreed to create a one-page welcome guide using the existing signup form.

Sam will draft the guide, with a delivery date still to be agreed. Jordan will send the approved screenshots by Wednesday.

Please confirm Sam’s draft date, whether Friday is a workable launch date, and whether the FAQ should be included.

Please reply with any corrections.

Thanks,
[Your name]

EDITABLE WORKSHEET

Capture the evidence

Project, meeting date and source-note location
[Enter your response]

Who will check the recap before it is shared?
[Enter your response]

Source fact or quotation	Type	Owner	Date	Open question
[Paste fact]	[Decision / Action / Question]	[Name / Unagreed]	[Date / Unagreed]	[Question]
[Paste fact]	[Decision / Action / Question]	[Name / Unagreed]	[Date / Unagreed]	[Question]
[Paste fact]	[Decision / Action / Question]	[Name / Unagreed]	[Date / Unagreed]	[Question]
[Paste fact]	[Decision / Action / Question]	[Name / Unagreed]	[Date / Unagreed]	[Question]

Keep the meaning intact

A proposed date stays a proposal until someone confirms it. An action can have an agreed owner and an unagreed deadline. A suggestion can remain open even when it sounds useful.

Conflicting notes to resolve
[Enter your response]

Facts or attachments to verify before drafting
[Enter your response]