

QSGTeams: Extract Decisions and Action Items from Meetings

Purpose: This SOP explains how to use Microsoft Copilot in Teams to identify decisions, action items, and open questions from meetings. The goal is to reduce ambiguity, improve accountability, and ensure meetings result in clear next steps.

When to Use This SOP

Use this SOP when:

A meeting covered multiple topics	Decisions were discussed but not clearly documented
Action items were mentioned informally	You need to confirm next steps after the meeting

Step-by-Step: Extract Outcomes with Copilot

Step 1. After the meeting, open the Teams meeting recap or related chat.	Step 2. Select Copilot from the meeting or chat interface.
Step 3. Use prompt below in Copilot to list decisions made, action items, and unresolved questions.	Step 4. Confirm accuracy and clarify ownership or deadlines as needed.
Step 5. Communicate confirmed outcomes or begin follow-up actions.	

Example CRAFT Prompt: Extract Meeting Outcomes

[CONTEXT] I need to confirm what was decided in this meeting and what actions need to be taken. [ROLE] Business Owner. [AUDIENCE] Internal team members. [FORMAT] Clear bullet points grouped by decisions, action items, and open questions. [TOPIC] Decisions made, who owns each action, deadlines mentioned, and unresolved items.

Common Decisions After Reviewing

Assign action items to specific owners	Schedule follow-up meetings if needed
Clarify unclear decisions	Communicate outcomes to stakeholders
Close items that require no further action	

Common Mistakes to Avoid

Assuming Copilot summaries are final without review	Leaving ownership unclear
Treating discussion as a decision	Failing to document unresolved questions