

QSGTeams: Prepare Clear Follow-Ups After Meetings

Purpose: This SOP explains how to use Microsoft Copilot in Teams to prepare clear, concise follow-up messages after meetings. The goal is to confirm decisions, reinforce accountability, and ensure everyone leaves with the same understanding of next steps.

When to Use This SOP

Use this SOP when:

A meeting included decisions or action items	A meeting included decisions or action items
You want to prevent misunderstandings	You need to document next steps clearly

Step-by-Step: Prepare a Meeting Follow-Up with Copilot

Step 1. Navigate to the Teams meeting chat or recap where the discussion occurred.	Step 2. Select Copilot from the meeting or chat interface.
Step 3. Use prompt below in Copilot to summarize decisions and action items into a clear follow-up message.	Step 4. Review the draft to confirm ownership, deadlines, and that the tone reflects your intent.
Step 5. Post the message in the meeting chat or appropriate channel.	

Example CRAFT Prompt: Draft a Meeting Follow-Up

[CONTEXT] I need to send a clear follow-up after this meeting so everyone understands what happens next. [ROLE] Business Owner. [AUDIENCE] Internal team members who attended the meeting. [FORMAT] A short follow-up message with bullet points. [TOPIC] Confirmed decisions, action items with owners, deadlines, and any open questions.

Common Decisions After Preparing the Follow-Up

Assign or reassign action owners	Clarify timelines
Escalate unresolved issues	Schedule follow-up discussions if needed
Close the meeting loop	

Common Mistakes to Avoid

Sending follow-ups without review	Leaving ownership or deadlines vague
Overwriting your natural communication style	Treating the follow-up as optional