

SIGNAL TO STRATEGY

From AI Notes to Sense-Making

A worksheet for teams using AI notetakers, transcripts, meeting summaries, and feedback tools who need to move from capture to judgment.

A transcript is not a pattern. A summary is not a strategy. An action item is not always the next right move.

Use this with

- Meeting transcripts
- Board meeting notes
- Partner call summaries
- AI notetaker summaries
- Community listening sessions
- Survey or feedback summaries

1. Start With The Capture

SOURCE

DATE

WHO WAS INVOLVED

What did the AI tool produce?

- Transcript
- Action items
- Summary
- Themes or sentiment

What is useful about the capture?

What seems incomplete, flattened, or missing?

2. Separate Capture From Meaning

What did people actually say?

What did the AI summarize or emphasize?

What needs human interpretation?

3. Find The Signal

Look for repetition, tension, absence, change, and energy.

Signals we notice:

What might these signals mean?

What should we avoid over-interpreting?

4. Name The Strategic Question

What decision, risk, opportunity, or relationship does this point toward?

Who needs to be part of that sense-making?

5. Translate Into Next Moves

What should we act on now?

What should we watch over time?

What needs clarification before action?

What should be brought back to the people who gave input?

6. Human Judgment Check

Are we moving because the AI produced an action item, or because the action fits the moment?

What would a thoughtful next move look like?
