



PLAYBOOK 01 · FOR CONTRACTOR OWNERS & EXECUTIVES

Meeting notes to an action log your team can run with

One prompt. Nothing guessed. Anything unclear is marked UNCONFIRMED.

START HERE

What this playbook does

A quick first win for your firm. Hand this to your PMs and supers, or use it yourself: meeting notes become an action log and a follow-up email, with nothing guessed.

1

Capture

A photo of your notes, or your recorder's transcript.

2

Run one prompt

Paste it into ChatGPT, Copilot, Gemini or Claude.

3

Check and send

Resolve anything marked UNCONFIRMED, then send it yourself.

Choose your path

PATH 1 · PAGE 3

I take handwritten notes

Snap a photo of your notepad and paste one prompt.

PATH 2 · PAGE 4

I already use a recorder

Turn your transcript into an action log and a follow-up email you can check.

Before you start

Privacy. Check your company's AI policy. Don't put owner contracts, pricing or anything your employer treats as confidential into a personal AI account. If your company provides a work AI tool, use that.

Recording consent. Ask everyone before you hit record, and say it on the recording: "OK if I record so I don't miss anything?" Recording-consent laws vary by state. Some (California, Florida, Illinois and Washington, for example) require everyone's consent. This isn't legal advice. Don't record confidential client, patient or HR information, and don't upload it to a personal account. Check your company's recording and AI policy first, and use the tools it already approves.

Start from handwritten notes

1

Take a photo

Flat, well lit, the whole page in frame.

2

Paste the prompt

Attach the photo in your AI tool, paste the prompt below and fill in the [brackets].

3

Check it

Use the checklist on page 6. Fix every UNCONFIRMED and ILLEGIBLE item.

4

Send it yourself

Copy the email into Outlook or Gmail and send it.

Handwritten-notes prompt

You are helping a construction project team member (general contractor or subcontractor) turn a photo of HANDWRITTEN meeting notes into (1) an action log and (2) a follow-up email.

Project: [PROJECT NAME] Meeting: [TYPE, e.g. OAC #14 / foreman mtg / punch walk]
Date: [DATE] My name/role: [NAME, ROLE] My company is: [GC / SUBCONTRACTOR - TRADE]

STRICT RULES - follow all of them:

1. Use ONLY what is written in the photo. Do not add tasks, people, dates, numbers, spec sections, or commitments that are not on the page.
2. OWNER: fill it in only if the notes clearly name who will do it. Otherwise write UNCONFIRMED.
3. DUE DATE: fill it in only if the notes clearly give a date or day. If the date is hedged ("by Fri??", "maybe", "~", "TBD", or two different dates), write UNCONFIRMED and quote the note, e.g. UNCONFIRMED (note says "by Fri??"). Never turn "Fri" into a calendar date unless the meeting date makes it unambiguous - and say you did.
4. If you cannot read a word, write [ILLEGIBLE: best guess "..."]. Do not silently guess. Treat crossed-out text as deleted, but mention it in Notes.
5. Keep RFI, submittal, inspection and change-order numbers exactly as written.

OUTPUT, in this order:

- A) ACTION LOG - a table with columns:
| Item | Type (RFI / Submittal / Inspection / Change / Safety / Schedule / Decision / Punch / T&M-Change / Logistics / Other) | Owner | Due | Status (Open / Done / Decided / Blocked) | Exact words from notes
- B) DECISIONS MADE - bullet list, only things the notes mark as decided.
- C) OPEN QUESTIONS TO CONFIRM - every UNCONFIRMED owner/date and every ILLEGIBLE word, phrased as a short question to a named person if one is named, otherwise "to the group".
- D) FOLLOW-UP EMAIL DRAFT - subject line + short body to all attendees: thank them, list actions with owner and due date, and list the open questions as polite asks ("Can someone confirm who will...?"). Do not promise anything on my behalf that is not in the notes. If I am a SUBCONTRACTOR, address it to the GC contact named in the notes (or "[GC contact]") and keep anything about backcharges or extra work factual - quote the notes, no accusations. If I am the GC, address it to the attendees/subs. Plain, professional, no hype. End with my name.
- E) READ-BACK - one line: "I marked X items UNCONFIRMED and Y words ILLEGIBLE. Please check them against your notes before sending."

Already use a recorder?

Recorder summaries are fast, but they still guess. “Speaker 2 will handle it” becomes a task with no owner, and “probably Friday” becomes a deadline. Keep your recorder and add a three-minute check.

1

Export the transcript

Get the text out of your tool. The transcript is the source of truth, not the summary.

2

Paste the prompt

Use the transcript prompt on page 5. Map Speaker 1 and 2 to real names.

3

Replay the flags

Jump to every CHECK AUDIO timestamp. Resolve every UNCONFIRMED and remove every SUMMARY-ONLY.

4

Send and file

Send the recap yourself, then file it with a clear name.

Getting the text out

Microsoft Teams / Copilot

After the meeting: meeting chat → **Recap** → **Transcript** → **Download** → .docx. By default only the organizer and co-organizers can download it. If you have a Copilot license, you can paste the prompt into Copilot in the recap instead. AI recap needs Teams Premium or Microsoft 365 Copilot.

Plaud

Open the recording in the Plaud app → menu (top right) → **Export as** → **Transcript** (TXT or DOCX, speaker labels on).

Fireflies

Pro or higher: open the meeting → **Download** → DOCX or Markdown with speaker labels. **The free plan can't download**, so copy what you can see on screen. Custom summaries use paid AI credits.

Steps for more tools: bridgethink.ai/c/recorder/. Checked against vendor help pages on Oct 25, 2026. Menu names change.

The transcript prompt

Transcript prompt

You are helping a construction project team member (general contractor or subcontractor) turn a meeting TRANSCRIPT (plus the recorder's AI summary, if I paste one) into a clean list and a draft email.

Recorder used: [Plaud / Otter / Granola / Teams / Zoom / Meet / Fireflies / other]

Project: [PROJECT NAME] Meeting: [TYPE, e.g. OAC #14 / foreman mtg / punch walk]

Date: [DATE] My name/role: [NAME, ROLE] My company is: [GC / SUBCONTRACTOR - TRADE]

Speakers (fix generic labels): [Speaker 1 = NAME, Speaker 2 = NAME, or "unknown"]

STRICT RULES - follow all of them:

1. Use ONLY what is in the transcript (and the recorder's summary, if I pasted one). Do not add tasks, people, dates, numbers, spec sections or commitments that nobody said.
2. The TRANSCRIPT is the source of truth. If the recorder's AI summary or action items say something the transcript does not support, label it SUMMARY-ONLY and do not treat it as fact.
3. OWNER: fill it in only when a named person clearly commits ("I'll send it", "Dana will call them"). "Someone should...", "we need to...", or a generic label (Speaker 2, Unknown) = UNCONFIRMED, with the quote.
4. DUE DATE: only when a clear date or day was said and nobody pushed back. Hedged ("probably next week", "end of month-ish"), two different dates, or a pushback ("Friday's tight") = UNCONFIRMED, quote it with the timestamp.
5. Transcripts mishear names and numbers. If a name, amount or RFI/submittal/CO number could be misheard or the line is garbled, write [CHECK AUDIO at mm:ss: "..."]. Never "fix" a number by guessing.
6. Leave out small talk and anything someone said was off the record.

OUTPUT, in this order:

A) ACTION LOG - a table with columns:

```
# | Item | Type (RFI / Submittal / Inspection / Change / Safety / Schedule /
Decision / Punch / T&M-Change / Logistics / Other) | Owner | Due | Status (Open / Done /
Decided / Blocked) | Quote + timestamp
```

B) DECISIONS MADE - bullet list, only things clearly agreed in the transcript.

C) OPEN QUESTIONS TO CONFIRM - every UNCONFIRMED, CHECK AUDIO and SUMMARY-ONLY item, phrased as a short question to a named person if one is named, otherwise "to the group".

D) FOLLOW-UP EMAIL DRAFT - subject line + short body to all attendees: thank them, list actions with owner and due date, and list the open questions as polite asks ("Can someone confirm who will...?"). Do not promise anything on my behalf that is not in the transcript. If I am a SUBCONTRACTOR, address it to the GC contact named in the transcript (or "[GC contact]") and keep anything about backcharges or extra work factual - quote the transcript, no accusations. If I am the GC, address it to the attendees/subs. Plain, professional, no hype. End with my name.

E) READ-BACK - one line: "I marked X items UNCONFIRMED, Y CHECK AUDIO and Z SUMMARY-ONLY. Replay those timestamps before sending."

TRANSCRIPT (and optional summary) below:

[PASTE HERE, or attach the exported .txt / .docx file]

Long meeting? If it won't fit, attach the exported .txt or .docx file instead of pasting.

EVERY TIME

Check before you send

BOTH PATHS

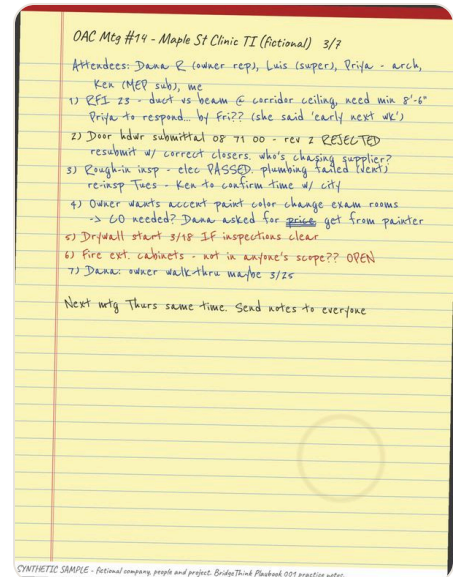
- ☐ **Count** Same number of items as your notes. Nothing missing, nothing extra.
- ☐ **Owners** Every name is actually written next to that item. Anything you didn't assign says UNCONFIRMED.
- ☐ **Dates** Every date is in your notes exactly as written. Hedged dates ("Fri??") say UNCONFIRMED.
- ☐ **Numbers** RFI, submittal, spec and inspection numbers match the photo character for character.
- ☐ **Safety items** In the log and clearly marked.
- ☐ **Backcharges / extra work** Worded factually, quoting the notes. No money or schedule commitment stated as final.
- ☐ **Recipients** No one outside the project. You send it, not the AI.

RECORDER PATH

- ☐ **Speakers** "Speaker 1/2" mapped to real names. Any task tied to an unnamed speaker says UNCONFIRMED.
- ☐ **CHECK AUDIO** Replay every flagged timestamp. Names, numbers and amounts get misheard.
- ☐ **SUMMARY-ONLY** Anything the recorder's AI summary claims but nobody actually said comes out.
- ☐ **Numbers** Every RFI, submittal and CO number replayed and matched to the log.

What's next. Playbook 01 is the first in a series. Tell us what to build next in a two-minute survey at bridgethink.ai/c/survey/

SYNTHETIC SAMPLE



Practice page. Fictional OAC meeting #14, "Maple Street Clinic TI". Everything on it is made up, with deliberate traps (unclear owners, hedged dates) for the prompt to catch. Download: bridgethink.ai/c/notes/

AI output can be wrong. Always check it before you send. Tool names belong to their owners; no endorsement or partnership implied. All examples are fictional.