FLOWGRAMMER COURSE WORKBOOK

Meeting Preparation and Follow-Up Agent Workbook

Build your Meeting Preparation and Follow-Up Agent Pack one evidence-disciplined section at a time.

> For Founders, consultants, salespeople, account managers, community operators, and interviewers who prepare inconsistently or lose decisions after important conversations. This draft workbook follows the course modules and ends with a reviewable capstone. The course uses fictional people and companies only. It excludes legacy residential addresses, personal contact information, and identifiable prospect records. It does not record meetings, send messages, alter invitations, or write to a CRM.

https://flowgrammer.ca/courses/meeting-preparation-follow-up-agent

SECTION 1

Define the Meeting Job and Permission Boundary

Write the agent charter, success condition, input list, permission matrix, and prohibited actions.

> Choose one meeting type and realistic objective, then grant only the inputs and actions that objective requires.

Evidence boundary: C7-S1 supports one meeting type, one prep, one follow-up, and on-demand operation. C7-S3 requires least access and separate authorization for calendar, documents, delivery, recording, and sending.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
- ☐ Next action testable

SECTION 2

Create Reusable Business and Meeting Context

Create a versioned business profile and a compact per-meeting request template.

> Store approved business context separately from each meeting request so the agent can repeat the job without mixing prospects.

Evidence boundary: C7-S3 requires reusable seller context, approved proof, limitations, call type, and profile version. C7-S4 supplies workflow-first questions and anti-fit boundaries.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
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SECTION 3

Resolve the Meeting, People, and Evidence

Build an identity checklist and source ledger with dates, locators, support, limits, and privacy class.

> Confirm the event, company, and professional identity with enough context to avoid attaching the wrong person's history.

Evidence boundary: C7-S2 demonstrates calendar-first context and research gaps. C7-S3 requires timezone, cancellation, reschedule, same-name handling, role corroboration, and source ledgers.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
- ☐ Next action testable

SECTION 4

Research Selectively and Safely

Create a bounded research plan and a limited-evidence fallback.

> Prioritize facts that could change the conversation, stop at approved limits, and show gaps when evidence is unavailable.

Evidence boundary: C7-S3 defines source preference, time and tool limits, blocked-source handling, malicious-input treatment, privacy boundaries, and limited-evidence output.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
- ☐ Next action testable

SECTION 5

Build the Pre-Meeting Brief

Produce a concise internal brief with a supported opener, three priority questions, gaps, and sources.

> The brief should connect verified context to a useful agenda while keeping facts, hypotheses, questions, and proposed next steps separate.

Evidence boundary: C7-S2 supplies the facts-summary-analysis pattern and Opening 60 Seconds. C7-S3 defines the full output contract and cautious sales interpretation. C7-S4 supports workflow-first questions.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
- ☐ Next action testable

SECTION 6

Capture Decisions and Commitments

Create a decision ledger from authorized fictional notes without inventing owners, deadlines, or agreement.

> Post-meeting processing must distinguish what was said, decided, assigned, proposed, and left unresolved.

Evidence boundary: C7-S3 specifies after-call continuity, separate commitments, proposed owners and dates, transcript consent, and shared meeting IDs. C7-S4 emphasizes workflow, ownership, baseline, human judgment, and fit.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
- ☐ Next action testable

SECTION 7

Create and Review the Follow-Up

Produce a reviewed follow-up package without creating or sending an external message.

> Generate a concise draft from the reviewed ledger, then require a human to approve its facts, tone, commitments, recipient, and next step.

Evidence boundary: C7-S1 requires a summary, actions, draft message, and no automatic sending. C7-S3 separates draft creation, mailbox insertion, sending, destination verification, and delivery evidence.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
- ☐ Next action testable

SECTION 8

Test Continuity, Safety, and Reuse

Run the capstone tests, record repairs, and finish launch and maintenance instructions.

> The agent is ready only when known, held-back, ambiguity, privacy, malicious-input, continuity, and prohibited-action cases pass.

Evidence boundary: C7-S3 provides twelve detailed tests covering business fit, identity, evidence, thin research, conflict, inference, calendar, history, malicious input, limits, usefulness, saving, repetition, and delivery.

Current input or evidence

Decision and reason

Unknowns, limits, and human owner

- ☐ Source or input recorded
- ☐ Interpretation labelled
- ☐ Boundary checked
- ☐ Next action testable