

HQ FIELD GUIDE

Meetings should change the work. Not create another document.

Connect every important conversation to the decisions, commitments, owners, customer context, project updates, and follow-up your team and agents need next.

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- 01 For revenue and delivery teams
 - 02 Faster follow-through, fewer dropped commitments, and a shared record of why the work changed.
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THE CURRENT COST

The transcript is saved. The company state is not.

Teams collect recordings and summaries, then still depend on someone to remember the decision, update the project, write the follow-up, and brief the next person.

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- 01 Decisions hide in prose: A summary mentions what was discussed without separating the decision, rationale, owner, and effect on the project.
 - 02 Commitments lose owners: Next steps are copied into messages, but deadlines, dependencies, and accountability drift after the call.
 - 03 The next conversation starts cold: Customer history, prior commitments, and unresolved decisions are searched for again before every meeting.
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THE HQ WORKFLOW

Move from transcript to shared company state.

HQ uses the conversation with existing company, customer, and project context, then routes the result into the work people and agents will continue.

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- 01 Ground the conversation: Connect the meeting to the relevant customer, project, prior decisions, commitments, and open questions.
 - 02 Extract what changed: Separate decisions, commitments, owners, signals, risks, and required updates from the general discussion.
 - 03 Review and continue the work: Approve the follow-up, update shared project context, and hand the next action to the responsible person or agent.
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PROOF AND EXAMPLE

The evidence is the work that changes after the meeting.

A good workflow leaves a clear decision record, owned commitments, updated project context, and a follow-up someone can review before it is sent.

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- 01 Decision record: What was decided, why, by whom, and which project or customer it changes.
 - 02 Commitment ledger: Owners, next actions, timing, dependencies, and unresolved questions remain explicit.
 - 03 Review-ready follow-up: The message reflects the conversation and existing relationship context before a person approves it.
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Examples are anonymized. Named customer claims and proprietary artifacts require recorded approval before public reuse.

START SMALL

Process one meeting all the way into action.

Do not stop at the summary. Prove the workflow by updating the shared state and handing a real next action to another participant.

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- 01 Connect one meeting to its customer or project context
 - 02 Capture decisions, commitments, owners, and required updates
 - 03 Have a teammate review the follow-up and continue one action
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TRY HQ

Let the next meeting begin where the last one ended.

Start with one important conversation and turn it into decisions, owners, project updates, and a reviewed next step.

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- 01 Reduce dropped decisions and commitments
 - 02 Keep projects and customer context current
 - 03 Make follow-up faster without losing human review
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Start free with HQ

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