

AI USE-CASE ASSESSMENT

Meeting action-note assistant

This report combines 4 core assessment results and 1 separately saved policy or guidance review.

Preliminary assessment based on the confirmed use case and customer-provided information. No supporting evidence was supplied or independently verified.

STATUS Complete	REPORT BASIS Preliminary	SUPPORTING FILES	REPORT VERSION 2	COUNTRY AU	PREPARED 21 September 2026
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SUGGESTED ROUTE Do not proceed until the recorded hard-stop reasons are resolved.

This report supports an accountable human decision. It is not legal advice, certification, approval or proof of compliance.

01 / CONFIRMED INPUT

Confirmed input

Working title	Meeting action-note assistant
Business context	An internal AI assistant for an Australian professional-services firm to draft meeting outputs from project meeting transcripts.
Current stage	Idea stage
Problem or opportunity	Project meetings may leave actions, decisions, owners or due dates unclear, which can lead to missed follow-up.
What happens today	A chair reviews meeting transcripts and a draft is prepared for the project register; the chair must review, edit or reject every draft before anything is copied across.
Evidence available	No measured baseline or supporting evidence is available yet. The idea is based on a stated need to reduce missed actions without increasing incorrect attribution.
Outcome sought	Fewer missed actions without increasing incorrect attribution.
How success will be measured	Fewer missed actions; no increase in incorrect attribution.
What AI will do	Turn ordinary project meeting transcripts into draft decisions, action items, proposed owners and due dates.
Users	Project coordinators and meeting chairs.
Affected people	Employees and contractors named in notes.
Owner and next decision-maker	Operations Director.
Decision boundary	The AI may draft proposed decisions, actions, owners and due dates. A human chair must review, edit or reject every draft before anything is copied into the project register. The AI must not create tasks, notify staff or make performance decisions.
Information used	Only synthetic transcripts from ordinary project meetings. The source may contain the spoken discussion, participant names or roles, explicit decisions, proposed actions, stated owners and mentioned dates. It must not infer sensitive personal matters.
Output and resulting action	Draft decisions, action items, proposed owners and due dates for review before possible entry into the project register.
Human responsibility	A meeting chair must review, edit or reject every draft. Humans decide what is copied into the project register.

Initial scope and exclusions	First step is a sandbox using synthetic transcripts. HR, legal, health, disciplinary, client-confidential and security meetings are excluded.
Other ways to address the problem	Manual meeting note drafting and register updates without AI.
If it goes wrong	Missed actions, incorrect attribution of owners or deadlines, extra review load, automation bias, privacy and consent issues, and problems with transcript retention.
Dependencies and constraints	Needs a defined test set, consent and retention rules, review capacity, override logging, error thresholds and a suspension trigger before sandbox testing.
Proposed next step	Define the sandbox test set and the rules for consent, retention, review, logging, error thresholds and suspension.

02 / CORE ASSESSMENT

Core assessment

01 Business assessment

Information strength: Limited

Report basis: Preliminary - customer-provided information; no supporting evidence.

Idea stage needs a defined sandbox test set

The use case is clear enough to start design, but the sandbox boundary, test set and review rules still need to be set. The main gap is the missing test definition and control rules for the next step.

Findings

- The business problem is clearly defined as missed actions and unclear owners or due dates in project meetings.
- There is no measured baseline yet for missed actions or incorrect attribution.
- The current workflow keeps a human chair in control before anything is copied into the project register.
- The sandbox test set, consent rules, retention rules, logging rules, error thresholds and suspension trigger are not yet defined.
- Cost viability cannot yet be assessed because funding, staffing and review capacity are not described.
- A manual note-drafting alternative exists.

Information used

- Confirmed use-case version 1

Limitations

- No supporting evidence records were supplied, so this is a preliminary business assessment based on the customer-provided use case only.
- The assessment does not cover user experience, technical feasibility, harms, policy compliance or legal compliance.

Review reference: REV-A97BE939

02 People assessment

Information strength: Limited

Report basis: Preliminary - customer-provided information; no supporting evidence.

Human review is defined, but the test setup still needs rules

The idea has a clear human review boundary and a defined next step for sandbox testing. The main gap is the missing test rules for consent, retention, logging, error limits and suspension.

Findings

- The proposed workflow keeps a human chair in charge of every draft before anything is copied into the project register.
- The people-related sandbox rules are not yet written for consent, retention, review logging, error thresholds and suspension.
- There is no information yet on accessibility needs, inclusive use or support for different users.
- The use case does not show whether project coordinators, meeting chairs, employees or contractors have been consulted.
- There is no measured baseline yet for missed actions, incorrect attribution or review load.

Information used

- Confirmed use-case version 1

Limitations

- This is a preliminary people assessment based only on the confirmed use case.
- No supporting evidence records were supplied, so findings rely on the customer-provided use case and assessment judgment.
- The assessment does not cover business case, technical feasibility, legal compliance or policy compliance.

Review reference: REV-2278162F

03 Technology assessment

Information strength: Limited

Report basis: Preliminary - customer-provided information; no supporting evidence.

Sandbox design needs test rules before build

The use case is technically workable at idea stage, but the sandbox is not yet defined well enough to start controlled testing. The main gap is the missing test set and operating rules for consent, retention, review, logging, error thresholds and suspension.

Findings

- The use case has a clear human decision boundary: the chair must review, edit or reject every draft before anything enters the project register.
- The sandbox test set has not yet been defined.
- Consent, retention, logging, error thresholds and suspension rules are still open.
- There is no measured baseline yet for missed actions or incorrect attribution.
- The first step is limited to synthetic transcripts and excludes HR, legal, health, disciplinary, client-confidential and security meetings.

Information used

- Confirmed use-case version 1

Limitations

- This is a preliminary technology assessment based only on the confirmed use case and no supporting evidence records.
- No current operational data, test results or production evidence were supplied.
- The assessment is calibrated to idea stage and the proposed next step of defining the sandbox test set and rules.

Review reference: REV-C6241DB6

04 Risks and oversight

Information strength: Limited

Report basis: Preliminary - customer-provided information; no supporting evidence.

Idea stage needs sandbox controls before testing

The use case has a clear human review gate and a narrow first scope. But the sandbox controls, handling rules and monitoring detail are still missing, so testing is not ready yet.

Findings

- The use case has a clear human gate: the chair must review, edit or reject every draft before anything is copied into the project register.
- The sandbox controls are not yet defined in enough detail, including the test set, consent and retention rules, review logging, error thresholds and suspension trigger.
- There is no measured baseline or supporting evidence yet for missed actions or incorrect attribution.
- The proposal excludes sensitive meeting types and says it must not infer sensitive personal matters, but the handling rules for transcript retention and consent are still undefined.
- The use case names an accountable owner, the Operations Director, for the proposal.

Information used

- Confirmed use-case version 1

Limitations

- This is an idea-stage assessment, so it does not require pilot or production performance evidence.
- No supporting_evidence records were supplied, so the assessment is preliminary and relies on the confirmed use case only.
- The assessment does not cover policy or legal compliance.

Review reference: REV-24F268A7

03 / POLICY AND GUIDANCE

Policy and guidance reviews

P1

Guidance for AI adoption: foundations

Voluntary public guidance

National AI Centre - Published 5 May 2026 - Australia

Scope: Organisations starting to use AI, using it in lower-risk ways, or establishing basic responsible-AI governance in a business context.

Report basis: Preliminary - customer-provided information; no supporting evidence.

Information strength: Limited

Idea stage needs sandbox rules before testing

The use case has a clear human review gate and a named owner, but the sandbox controls are still incomplete. More detail is needed on consent, retention, logging, error limits and suspension before testing can begin.

Review status: No stop

Findings

- The use case has a named accountable owner and a human chair must review every draft before it can be copied into the project register.
- The sandbox test set and operating rules for consent, retention, logging, error thresholds and suspension are not yet defined.
- There is no measured baseline yet for missed actions, incorrect attribution or review load.
- The use case excludes sensitive meeting types and forbids inference about sensitive personal matters, but transcript handling rules are still incomplete.

Overlaps

- The business, people, technology and risk reviews all agree that the chair keeps human control before any draft is copied into the project register.
- All four core assessments agree that the sandbox test set and the control rules are still missing.
- All four core assessments note that no measured baseline is available yet.

Conflicts for human review

- No material conflicts were identified between the supplied use case and the four core assessments.

Limitations

- No supporting_evidence records were supplied, so this review is preliminary and relies on the confirmed use case and the four core assessment results.
- The review does not make a legal, certification or compliance finding.
- The material does not yet show measured outcomes, operational testing or user consultation.

Authoritative source practices

- Decide who is accountable: <https://www.ai.gov.au/staying-safe-and-responsible/essential-ai-practices/guidance-ai-adoption-foundations#1-decide-who-is-accountable>
- Maintain human control: <https://www.ai.gov.au/staying-safe-and-responsible/essential-ai-practices/guidance-ai-adoption-foundations#6-maintain-human-control>

- Understand impacts and plan accordingly: <https://www.ai.gov.au/staying-safe-and-responsible/essential-ai-practices/guidance-ai-adoption-foundations#2-understand-impacts-and-plan-accordingly>
- Measure and manage risks: <https://www.ai.gov.au/staying-safe-and-responsible/essential-ai-practices/guidance-ai-adoption-foundations#3-measure-and-manage-risks>
- Test and monitor: <https://www.ai.gov.au/staying-safe-and-responsible/essential-ai-practices/guidance-ai-adoption-foundations#5-test-and-monitor>
- Share essential information: <https://www.ai.gov.au/staying-safe-and-responsible/essential-ai-practices/guidance-ai-adoption-foundations#4-share-essential-information>

Source captured 13 September 2026. Review reference: REV-C6485DA2.

04 / DECISION RECORD

Conditions, gaps and limitations

Conditions

- Synthetic transcripts are a good first step, but real transcript use will need consent, retention and access rules.
- Named people in notes can create privacy and attribution risks, so the review process and logging need to be strict.
- High-impact errors are possible even in drafting tools, so the suspension trigger and error thresholds should be defined before testing.
- Define and approve the sandbox test set, consent and retention rules, review logging, error thresholds and suspension trigger. Owner: Operations Director. Due: Before sandbox testing starts. Closure evidence: Approved sandbox test plan or control standard that names the test set, consent and retention rules, logging, thresholds and suspension trigger.
- Define and approve a representative sandbox test set with labelled examples for actions, decisions, owners, due dates and hard negatives. Owner: Operations Director. Due: Before sandbox testing starts. Closure evidence: Approved test-set definition and labelled test file or register.
- Write the transcript handling rule for consent, retention and deletion before any sandbox runs. Owner: Privacy or records management lead. Due: Before sandbox testing starts. Closure evidence: Approved transcript handling procedure for the sandbox.
- Obtain, review and approve the information needed to resolve: A brief staff note or training record showing how chairs and coordinators will explain AI use, limits and user notices. Owner: Owner to be assigned. Due: Before the next governance decision. Closure evidence: An approved record demonstrating that a brief staff note or training record showing how chairs and coordinators will explain ai use, limits and user notices is resolved..

Related evidence gaps

Testing, monitoring and evidence

- Baseline figures for missed actions, incorrect attribution and review effort in the current manual process. A simple baseline for missed actions, incorrect attribution and review load.
- A defined sandbox test set with examples, size and selection rules.; Consent, retention, review, logging, error threshold and suspension rules for the sandbox. A written sandbox plan with the test set, consent rules, retention rules, logging rules, error thresholds and suspension trigger.
- Baseline measures for missed actions, incorrect attribution and review load. An approved labelled sandbox test set for ordinary project meeting transcripts. Initial evaluation thresholds and review criteria for missed actions and incorrect attribution. Baseline measure for missed actions and incorrect attribution in the current manual process.

Contributing saved outputs: Business assessment; People assessment; Technology assessment; Risks and oversight; Guidance for AI adoption: foundations

People and use

- Expected review capacity, staffing allocation and funding for the sandbox phase.
- The people-related sandbox rules are not yet written for consent, retention, review logging, error thresholds and suspension. Consent, retention, logging, error thresholds and suspension rules are still open.
- Accessibility and inclusion needs for chairs, coordinators and any other users. Records of consultation with project chairs, coordinators and affected employees or contractors.

Contributing saved outputs: Business assessment; People assessment; Technology assessment; Risks and oversight

Data and information

- There is no information yet on accessibility needs, inclusive use or support for different users.

Contributing saved outputs: People assessment

Limitations

- The assessment does not cover user experience, technical feasibility, harms, policy compliance or legal compliance.
- No supporting evidence records were supplied, so this is a preliminary business assessment based on the customer-provided use case only.
- No current operational data, test results or production evidence were supplied.
- No supporting evidence was cited, so this report is preliminary.
- This report supports human review. It is not legal advice, certification, approval or proof of compliance.

Saved output index

Output	Version or result hash	Status
Confirmed AI use case	Version 1	confirmed
Business assessment	a97be939339622ea1bdd7769d3170f85142373bb9d080ca4547ef0c1539d7f71	viewed
People assessment	2278162f8c63ee6b690e1411fa271c5ec910ba46ba9991011410d86ed1f8d49a	viewed
Technology assessment	c6241db66012729b159426440dcdd514faa7ae2eee779471936493b0d3948178	viewed
Risks and oversight	24f268a7f1e49da0e9ca79afb7bda228205541128be0a230b78a9dd5b03d8c	viewed
Guidance for AI adoption: foundations	Published 5 May 2026 · c6485da2548564a4ed90b44bf1fb833f3059ca22eb9e6a18bfc1344cdac39c23	viewed

Report identity: 3f7a1fc2bd8150fccd5c94b5ada844b8040e3eb70b5ac9684119d5670f016fef

Confirmed use-case version: 1. Source assessment revision: 18.

Always consult the linked authoritative policy sources. This report is designed for reading, searching and copying.