Founders AI
founders-ai.dev

PRACTICAL AI FIELD GUIDE

AI Meeting Prep

How to Walk Into Any Call With Better Questions, Context, and Next Steps

A practical prospecting guide for founders, business owners, consultants, salespeople, and creators who want better leads before better messages.

- Build an ICP
- Spot buying triggers
- Research accounts
- Map buyer roles
- Score lead quality
- Know what not to automate

Start here

Most people use AI after a meeting.

They ask it to summarize notes, write a follow-up email, or clean up a messy transcript. That is useful, but it misses the bigger opportunity.

AI is more valuable before the call.

When you prepare well, you ask better questions. You waste less time on obvious context. You notice what matters. You sound sharper without sounding scripted. The other person feels like you respected their time before the meeting even started.

This guide gives you a simple system for using AI to prepare for any important conversation.

It works for:

- Sales calls.
- Client calls.
- Partnership calls.
- Founder meetings.
- Job interviews.
- Networking calls.
- Internal planning meetings.
- Vendor calls.
- Customer research calls.

The goal is not to walk in with a robotic script. The goal is to walk in with context, questions, and a clear next step.

Use AI as the prep assistant.

Stay human in the conversation.

The Founders AI rule

Before any important call, use this rule:

> **Never let the first five minutes of the meeting be the first five minutes you think seriously about the other person.**

That sounds obvious, but it is where most meetings go wrong.

People show up with a calendar invite, a vague goal, and no real plan. Then they spend half the call trying to understand who is on the other side, what matters, and what should happen next.

AI can fix that if you use it correctly.

Good AI meeting prep should answer five questions:

1. Who am I talking to?
2. What is probably important to them right now?
3. What do I need to learn?
4. What risks or objections might come up?
5. What should happen after the call?

If you answer those before the meeting, the call feels calmer. You can listen better because you are not scrambling for context. You can ask better questions because you already know the basics. You can follow up faster because you know what outcome you are aiming for.

Why meetings matter more now

AI is making information easier to access, but it is not making trust automatic.

Gartner found that 45% of B2B buyers used generative AI in a recent purchase, mostly to gather vendor and product information, but 69% still preferred to validate AI-generated insights with sales reps (BusinessWire). That means a good meeting is not just a place to deliver information. It is a place to help someone make sense of information.

Forrester's 2026 analysis says modern digital-native buyers do more self-guided research, form opinions before talking to sellers, and have less patience for generic outreach (Forrester). That same behavior shows up outside sales too. Clients research before hiring. Job candidates research before interviews. Business owners compare options before replying. Creators and partners look for proof before taking a call.

So the meeting has changed.

The old meeting:

- "Let me tell you who we are."
- "Let me walk you through our offer."
- "Let me ask generic discovery questions."

The new meeting:

- "Here is what I understand so far."
- "Here is what I might be missing."
- "Here are the two or three things worth clarifying."
- "Here is the decision or next step this conversation should support."

AI helps you prepare for the new meeting.

The meeting prep stack

Use this stack for any important call.

Layer	Question	What AI can help with
Context	Who are they and what is happening around them?	Summarize public information, prior notes, website pages, emails, posts, or CRM context.
Goal	What should this meeting accomplish?	Clarify the meeting objective and likely decision point.
Questions	What do I need to learn?	Generate open-ended questions based on the person, situation, and call type.
Risks	What could block progress?	Identify likely concerns, missing information, objections, or trust gaps.
Agenda	How should the call flow?	Build a short, flexible agenda that leaves room to listen.
Follow-up	What should happen after?	Draft next steps, recap format, and owner/action items.

Most people only prepare the agenda. That is not enough.

The agenda is the visible part. The real value is context, questions, and judgment.

Step 1: define the meeting type

AI gives better output when it knows what kind of meeting you are preparing for.

Start by labeling the meeting.

Common meeting types:

- **Discovery call**: Learn the situation, goals, constraints, and fit.
- **Sales call**: Understand need and show whether your offer can help.
- **Client intake**: Gather enough information to begin work correctly.
- **Partnership call**: Find shared goals, audience overlap, and possible collaboration.
- **Job interview**: Show fit while learning whether the role is right.
- **Networking call**: Build a relationship and exchange useful context.
- **Internal planning call**: Align on decisions, owners, risks, and next steps.
- **Vendor call**: Evaluate whether a tool or service solves the real problem.
- **Customer research call**: Learn from the person's experience without pitching too soon.

Do not skip this step. A sales call and a customer research call may involve the same person, but they should not have the same questions.

Write this sentence:

> **This is a [meeting type] with [person/role] about [topic], and the goal is to [desired outcome].**

Examples:

- "This is a discovery call with a roofing company owner about lead intake, and the goal is to understand whether their estimate process is creating admin friction."
- "This is a networking call with a founder who has built a paid AI education community, and the goal is to learn what worked before building my own."
- "This is a client intake call with a local service business, and the goal is to understand the current workflow before suggesting automation."

Now AI has a job.

Step 2: build a 10-minute meeting brief

A meeting brief is a one-page summary that helps you walk in with context.

It should not be a giant research report. If it is too long, you will not use it.

Use this structure:

Section	What to include
Person	Name, role, company, background, and likely responsibilities.
Situation	Recent signals, visible problems, stated goals, or relevant context.
Likely priorities	What they probably care about in plain language.
What I know	Facts, not guesses.
What I am assuming	Reasonable guesses that need validation.
What I need to learn	Questions the call should answer.
Possible value	How I might help, if there is fit.
Risks	Concerns, objections, missing info, or reasons not to move forward.
Next step	What should happen if the call goes well.

The most important sections are "what I know" and "what I am assuming."

Do not mix them.

Facts:

- "Their website has a quote form."
- "They posted about hiring a coordinator."
- "They sell to local homeowners."

Assumptions:

- "They may be spending too much time cleaning up messy form submissions."
- "They may be trying to reduce admin load."
- "They may care about faster response time."

Good meetings test assumptions. Bad meetings pretend assumptions are facts.

Prompt: meeting brief builder

Use this prompt before any important call.

```
You are helping me prepare for a meeting.

Meeting type:
[Discovery call, sales call, client intake, partnership call, interview, internal meeting, etc.]

Who I am meeting:
[Name, role, company, relevant background]

Topic:
[What the meeting is about]

What I know:
[Paste research notes, prior emails, website notes, CRM notes, LinkedIn notes, or context]

My goal:
[What I want to understand, decide, or accomplish]

Create a concise meeting brief with:
1. Person/company context
2. Likely priorities
3. Facts I know
4. Assumptions I should validate
5. Questions I should ask
6. Possible concerns or objections
7. What I should avoid saying
8. Suggested agenda
9. Best possible next step

Keep it practical. Do not invent facts. Clearly separate facts from assumptions.
```

Read the output once. Then cut it down.

The final brief should fit on one page.

Step 3: prepare better questions

The best meeting prep does not give you a script. It gives you better questions.

Highspot's 2026 discovery-call guidance says top-performing reps prepare with research, listen with intent, and use smart questions to show up informed and relevant (Highspot). It also says discovery works best when questions expose urgency, buying dynamics, impact, and consequences without overwhelming the conversation (Highspot).

You can use that outside sales too.

Good questions usually do one of five things:

1. Clarify the current situation.
2. Reveal the real problem.
3. Understand what has already been tried.
4. Identify constraints.
5. Create a next step.

Use these question types.

Context questions

- "What made this worth looking at now?"
- "How are you handling this today?"
- "Who is involved in this process?"
- "What has changed recently?"

Problem questions

- "Where does this usually break down?"
- "What part takes more time than it should?"
- "What happens when this does not get handled well?"
- "What are people frustrated by?"

Constraint questions

- "What would make a solution hard to adopt?"
- "What tools or processes does this need to fit into?"
- "What cannot change right now?"
- "What would make this a bad fit?"

Decision questions

- "What would make this worth doing?"
- "How would you know this worked?"
- "What would need to be true for this to move forward?"
- "Who else would need to weigh in?"

Next-step questions

- "What would be the most useful follow-up from here?"
- "Should I send a quick example?"
- "Would it help if I mapped the current process?"
- "Is there a specific question you want me to answer next?"

Prompt: question builder

Use this when you have a meeting brief and need sharper questions.

```
Using this meeting brief, create a question plan.

Brief:
[Paste meeting brief]

Create:
1. Three context questions
2. Three problem questions
3. Three constraint questions
4. Three decision questions
5. Three next-step questions

Rules:
- Questions should sound natural.
- Avoid interrogation.
- Avoid yes/no questions unless the answer helps make a decision.
- Make the questions specific to this person and meeting.
- Add a note explaining when to ask each question.
```

Do not ask all 15 questions. Pick the best five to seven.

Step 4: prepare your opening

The first two minutes set the tone.

A strong opening does three things:

- Shows you prepared.
- Confirms the goal.
- Gives the other person room to adjust.

Use this structure:

```
Thanks for making time. I did a little prep so we do not have to start from zero.

Here is what I understand so far:
[One or two short bullets]

What I would like to do is:
[Goal for the call]

Before we jump in, is there anything you want to make sure we cover?
```

Example:

```
Thanks for making time. I did a little prep so we do not have to start from zero.

From what I can see, your quote form is active, but the intake details look pretty open-ended. My guess
is that your team may still have to clean up a lot of requests before scheduling.

What I would like to do is understand how that process works today and see if there is a simple AI-
assisted step that would actually help.

Before we jump in, is there anything you want to make sure we cover?
```

This opening is not flashy. It is useful.

It also protects you from making the meeting about your pitch too early.

Step 5: identify likely concerns before the call

Do not wait for objections to surprise you.

Before the meeting, use AI to identify the concerns a reasonable person might have.

Examples:

- "Will this take too much time?"
- "Will this be too expensive?"
- "Will this work with our existing tools?"
- "Will my team actually use it?"
- "Will AI make mistakes?"
- "Is this secure?"
- "Is this worth changing our process?"
- "Are you overcomplicating something simple?"

The goal is not to memorize rebuttals. The goal is to understand the other person's risk.

Use this prompt.

```
Act as the person I am meeting with.

Meeting brief:
[Paste brief]

My possible offer or idea:
[Explain it plainly]

List the most likely concerns, objections, or doubts this person may have.

For each one:
1. Explain why the concern is reasonable
2. Give me a question I can ask to understand it better
3. Give me a calm response that does not sound defensive
4. Tell me what proof, example, or next step would help

Do not write aggressive sales rebuttals. Help me understand the concern.
```

This is one of the best uses of AI in meeting prep. It helps you become less defensive and more prepared.

Step 6: use AI notes without outsourcing attention

AI note-takers and meeting recaps are useful, but they do not replace listening.

Microsoft says Copilot for Sales can generate meeting recaps, summarize sales insights, suggest post-meeting actions, create follow-up tasks, and save AI-generated notes to CRM so sellers can focus on the discussion instead of capturing every note (Microsoft Learn). That is the right idea. Let AI capture the transcript and structure the notes, but do not let it make you passive during the conversation.

During the call, listen for:

- Exact phrases the person uses.
- Repeated frustrations.
- Moments of hesitation.
- Questions they ask twice.
- Tradeoffs they mention.
- Names of stakeholders.
- Timing constraints.
- Budget or resource constraints.
- Current workaround.
- The next action they seem willing to take.

Write down only the signals that matter. Let the transcript catch the rest.

Use this simple note format:

Signal	Notes
Goal	What are they trying to accomplish?
Problem	What is not working today?
Current process	How do they handle it now?
Constraint	What limits the solution?
Stakeholders	Who else matters?
Concern	What are they worried about?
Exact phrase	What wording should be reused in follow-up?
Next step	What did they agree to?

The "exact phrase" row matters. Follow-up is stronger when it uses the other person's language.

Step 7: create the follow-up before the meeting ends

A good meeting is wasted if the follow-up is vague.

Before the call ends, confirm:

- What was decided.
- What is still unclear.
- Who owns the next step.
- When it should happen.
- What you will send.

Use this line:

> **Before we wrap, here is what I heard and what I think the next step is. Tell me if I have this wrong.**

Then summarize in 20 to 30 seconds.

After the call, use AI to turn your notes into a follow-up.

```
Turn these meeting notes into a concise follow-up email.

Audience:
[Who the email is going to]

Meeting goal:
[Why we met]

Notes:
[Paste notes or transcript summary]

Write:
1. A short thank-you
2. A recap using their language
3. The main problem or goal we discussed
4. Decisions made
5. Open questions
6. Next steps with owners and timing

Rules:
- Keep it under 200 words unless the meeting requires more detail.
- Do not add anything that was not discussed.
- Use plain language.
- Make the next step obvious.
```

Do not send the AI draft untouched. Check it against your actual memory of the conversation.

Saveable tool: 10-minute meeting brief

Use this when you have a call coming up and only a few minutes to prepare.

Field	Fill this in
Meeting type	Discovery, sales, intake, partnership, interview, internal, vendor, research
Person	Name, role, company, background
Topic	What the meeting is about
Goal	What you want to understand, decide, or accomplish
Known facts	Only what you can verify
Assumptions	Reasonable guesses that need validation
Likely priorities	What probably matters to them
Best questions	Five to seven questions worth asking
Likely concerns	Risks, objections, or trust gaps
Opening	Your first two minutes
Desired next step	What should happen if the call goes well

Saveable tool: meeting scorecard

Use this after a meeting to improve the next one.

Category	Question	Score 1 to 5
Prepared context	Did I understand the basics before the call?	
Clear goal	Did I know what the meeting needed to accomplish?	
Good opening	Did I set the agenda without taking over?	
Better questions	Did my questions create useful answers?	
Listening	Did I follow what they said instead of forcing my script?	
Risk discovery	Did I surface concerns or blockers?	
Next step	Did we leave with a clear owner and action?	
Follow-up	Did my recap make the next step obvious?	

Target score: 32 out of 40.

If you score low, fix the weakest category before your next meeting.

Saveable tool: pre-call checklist

Before the meeting:

- Did I define the meeting type?
- Did I write the goal in one sentence?
- Did I separate facts from assumptions?
- Did I prepare five to seven useful questions?
- Did I prepare a simple opening?
- Did I identify likely concerns?
- Did I decide what next step I want if the call goes well?
- Did I avoid over-scripting the conversation?

During the meeting:

- Did I confirm the agenda?
- Did I ask open-ended questions?
- Did I listen for exact phrases?
- Did I ask clarifying follow-ups?
- Did I avoid pitching too early?
- Did I confirm the next step before the call ended?

After the meeting:

- Did I send a concise recap?
- Did I include owners and timing?
- Did I remove anything AI invented?
- Did I save the notes somewhere useful?
- Did I update what I learned about the person, company, or process?

What not to automate

Do not automate away the parts that build trust.

Be careful automating:

- **Final interpretation**: AI can summarize, but you decide what mattered.
- **Emotional tone**: AI may miss hesitation, discomfort, or enthusiasm.
- **Sensitive assumptions**: Do not let AI infer private problems or internal politics without evidence.
- **Follow-up commitments**: Do not promise work, timing, pricing, or outcomes you did not agree to.
- **CRM notes**: Do not save unreviewed AI summaries if they contain errors.
- **Coaching feedback**: AI can flag patterns, but it should not be the only judge of call quality.

The best meeting systems are human-led and AI-assisted.

AI prepares the room.

You still have to be present in it.

Final reminder

The point of meeting prep is not to sound impressive.

The point is to make the conversation easier for the other person.

When you show up with context, better questions, a flexible agenda, and a clear next step, you reduce the amount of work they have to do. That is valuable whether you are selling, hiring, learning, partnering, consulting, or just trying to make better decisions.

Use AI to get ready.

Use the meeting to listen.

Use the follow-up to make progress real.