

The AI Executive Assistant Toolkit

Templates, Checklists & Worksheets

A companion resource to *The AI Executive Assistant Playbook*

www.AIExecutiveAssistantToolkit.com

How to Use These Templates

These templates are designed to be filled in and reused. Print them, copy them into your own documents, or keep this PDF open alongside your AI tool as a daily reference. Each template maps to a specific chapter in the book.

Template 1: Responsible AI Checklist

Reference: Chapter 3

Use this before sharing **any** AI-generated output. It takes 60 seconds and prevents the mistakes that matter most.

Date: _____ **Task/Deliverable:** _____ **AI Tool Used:** _____

#	Checkpoint	✓
1	Reviewed and edited — I read the full output and revised it, not just skimmed it.	<input type="checkbox"/>
2	Facts verified — All names, dates, figures, and claims are confirmed against original sources.	<input type="checkbox"/>
3	Confidentiality checked — No sensitive information was entered into an unapproved tool.	<input type="checkbox"/>
4	Executive voice matched — The tone, phrasing, and style sound like my executive, not like a chatbot.	<input type="checkbox"/>
5	Clear and concise — The output is tight, scannable, and ready for an executive audience.	<input type="checkbox"/>

All five boxes checked? It's ready to send.

Template 2: Executive Briefing Template

Reference: Chapter 5

Use this structure for any executive briefing. Fill in the sections relevant to your meeting type.

EXECUTIVE BRIEFING

Prepared for: _____ Prepared by: _____ Date: _____

Meeting/Topic: _____

Company / Topic Overview

What they do, size, market position, or background context on the topic.

Key People

Names, titles, and relevant background for anyone attending or involved.

Name	Title	Key Background
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Recent Developments

News, funding, product launches, partnerships, or relevant changes from the past 6 months.

Discussion Opportunities

2–3 conversation topics or agenda items relevant to the meeting.

1. _____

- 2. _____
- 3. _____

Risks or Considerations

Anything the executive should be aware of going in.

Internal Context

Notes only you know — relationship history, previous interactions, political dynamics.

Template 3: Internal Decision Brief

Reference: Chapter 5

Use this when your executive needs key arguments organized before a decision-making meeting.

DECISION BRIEF

Prepared for: _____ **Date:** _____ **Meeting:** _____

Decision Required

One sentence framing the choice.

Background

2–3 sentences of relevant context.

Options

Option A: _____

Pros

Cons

_____	_____
_____	_____
_____	_____

Option B: _____

Pros

Cons

_____	_____
_____	_____
_____	_____

Option C (if applicable): _____

Pros

Cons

_____	_____
_____	_____
_____	_____

Recommendation

Open Questions

Anything unresolved that may come up in discussion.

- 1. _____
 - 2. _____
 - 3. _____
- _____

Template 4: Meeting Agenda Template

Reference: Chapter 7

Customize this for any meeting type. Mark items with [DECISION] where a decision is required.

MEETING AGENDA

Meeting: _____ **Date:** _____ **Duration:** _____ **Chair:** _____
Attendees: _____

Pre-Read Materials:

- _____
- _____

Time	Topic	Lead	Type	Discussion Question
	Opening & Context		Info	
			<input type="checkbox"/> Info <input type="checkbox"/> Discussion <input type="checkbox"/> DECISION	
			<input type="checkbox"/> Info <input type="checkbox"/> Discussion <input type="checkbox"/> DECISION	
			<input type="checkbox"/> Info <input type="checkbox"/> Discussion <input type="checkbox"/> DECISION	
			<input type="checkbox"/> Info <input type="checkbox"/> Discussion <input type="checkbox"/> DECISION	
	Action Items & Owners		Closing	
	Buffer (end 5 min early)			

Template 5: Meeting Summary Template

Reference: Chapter 8

Distribute this within 30 minutes of every meeting ending.

MEETING SUMMARY

Meeting: _____ **Date:** _____ **Attendees:** _____ **Prepared by:** _____

Meeting Overview

One sentence — purpose and context.

Key Discussion Points

Topic 1: _____

Topic 2: _____

Topic 3: _____

Decisions Made

#	Decision	Conditions/Notes
1		
2		
3		

Action Items

Action Item	Owner	Deadline

Open Questions

1. _____

- 2. _____
- 3. _____

Template 6: Action Item Tracker

Reference: Chapter 9

Maintain this as a running document. Update after every meeting.

ACTION ITEM TRACKER

Week of: _____ Maintained by: _____

#	Action Item	Owner	Deadline	Source Meeting	Status
1					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
2					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
3					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
4					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
5					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
6					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
7					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
8					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
9					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue
10					<input type="checkbox"/> Open <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> Overdue

Weekly Status Summary

Completed this week: _____

In progress: _____

Overdue / At risk: _____

Items requiring executive attention: _____

Template 7: Executive Travel Brief Template

Reference: Chapter 11

Use this for multi-city or international trips. For simple domestic trips, the itinerary section alone may be sufficient.

EXECUTIVE TRAVEL BRIEF

Traveler: _____ Dates: _____ Route: _____ Prepared by: _____
Emergency contact: _____

Passport & Visa Status (*international trips only*)

Document	Status	Expiration
Passport	<input type="checkbox"/> Valid <input type="checkbox"/> Needs Renewal	
Visa — Country 1:	<input type="checkbox"/> Not Required <input type="checkbox"/> Approved <input type="checkbox"/> Pending	
Visa — Country 2:	<input type="checkbox"/> Not Required <input type="checkbox"/> Approved <input type="checkbox"/> Pending	

Flight Details

Leg	Airline & Flight #	Departure	Arrival	Seat	Confirmation
Outbound					
Connection/Leg 2					
Connection/Leg 3					
Return					

Hotel Details

City	Hotel Name	Address	Confirmation	Check-in	Check-out

City	Hotel Name	Address	Confirmation	Check-in	Check-out

Ground Transportation

Date	Service	Booking #	Pickup Location	Pickup Time

Daily Schedule

Day 1 — [Date] — [City]

Time	Activity	Location	Contact	Notes

Day 2 — [Date] — [City]

Time	Activity	Location	Contact	Notes

(Copy and repeat for additional days)

Key Contacts

Name	Role	Phone	Email

Embassy Information *(international trips only)*

Embassy	Address	Phone

Cultural & Travel Notes (*international trips only*)

Additional Notes

Template 8: Calendar Audit Worksheet

Reference: Chapter 13

Complete this every Friday or Monday morning to optimize the upcoming week.

WEEKLY CALENDAR AUDIT

Week of: _____ Executive: _____ Completed by: _____

Schedule Overview

Day	Total Meetings	Back-to-Back?	Focus Time Available?	Highest-Stakes Meeting
Monday		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes: ____ hrs <input type="checkbox"/> No	
Tuesday		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes: ____ hrs <input type="checkbox"/> No	
Wednesday		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes: ____ hrs <input type="checkbox"/> No	
Thursday		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes: ____ hrs <input type="checkbox"/> No	
Friday		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes: ____ hrs <input type="checkbox"/> No	

Audit Findings

Back-to-back risks (meetings with no buffer):

Focus time gaps (days with no protected strategic work time):

Grouping opportunities (meetings that could be batched):

Low-value time (meetings that could be shortened, delegated, or declined):

Energy management concerns (high-stakes meetings at suboptimal times):

Changes to Implement This Week

Change	Action Required	Done?
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Template 9: A.I.D.E.A.L. Weekly Scorecard

Reference: Chapter 16

Complete every Friday. Rate yourself 1–5 on each element.
1 = didn't address this at all | 3 = adequate | 5 = operated at the highest level

A.I.D.E.A.L. WEEKLY SCORECARD

Week of: _____ Name: _____

Element	Question	Score (1–5)	Notes / Evidence
A — Analyze	Did I proactively surface relevant information for my executive this week?	/5	
I — Improve	Did the communications I drafted meet the highest standard of clarity and tone?	/5	
D — Drive	Did every meeting have a clear agenda, summary, and tracked action items?	/5	
E — Enable	Did I protect my executive's time and ensure their calendar reflected priorities?	/5	
A — Arrange	Were all logistics seamless, with every detail confirmed and documented?	/5	
L — Leverage	Did I apply strategic judgment beyond what was explicitly asked of me?	/5	

Total Score: _____ / 30

Reflection

Biggest win this week:

Lowest-scoring area — what one thing could I do next week to improve?

Goal for next week:

Previous Weeks Tracking

Week	A	I	D	E	A	L	Total
	/5	/5	/5	/5	/5	/5	/30
	/5	/5	/5	/5	/5	/5	/30
	/5	/5	/5	/5	/5	/5	/30
	/5	/5	/5	/5	/5	/5	/30

About This Resource

These templates are a companion to *The AI Executive Assistant Playbook* by Executive AI Institute. For the complete workflows, prompts, and strategic frameworks behind these templates, get the book on Amazon.

For the complete 75-prompt library and additional resources, visit www.AIExecutiveAssistantToolkit.com.

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