

Work sample - fictional scenario

Leadership Meeting Minutes: Mon 12 Oct 2026, 9:30–10:30 AM ET (Teams)

Attendees:

1. Dana Whitfield - CEO (Chair)
2. Marcus Reyes - COO
3. Tom Becker - Controller
4. Priya Nair - Head of Sales
5. Luis Ortega - Head of Operations (joined 9:35 AM ET)
6. Janelle Ortiz - HR Manager (attended item 4 only)

Minutes by: Eddah Dena - Executive Assistant

Decisions

1. Board cash flow forecast (to Q2 2027) due Fri 30 Oct; Tom may draw on Marcus's team.
2. Marketing budget rework: parked until the new VP Marketing starts. No action this week.
3. TrailMart spring allocation: accept 14 linear feet; propose a Q2 end cap to recover space.
4. Peak-season temp staffing: start with 20 temps from Sun 1 Nov (revised from 25 after Q3 cash update); review adding the other 5 on Sun 15 Nov (date to confirm).
5. Racking quotes deadline extended to Fri 23 Oct.
6. VP Marketing hire: Discussed. Details held by HR.

Actions

ID	Owner	Action	Due	Status
A-031	Marcus Reyes	Revised freight contract summary (waiting on legal)	No date set - flagged	Carried over
A-032	Priya Nair	TrailMart deck to Dana	Tue 6 Oct (sent Wed 7 Oct)	Done
A-033	Luis Ortega	3 warehouse racking quotes (2 of 3 in)	Fri 23 Oct	In progress
A-034	Tom Becker	Q3 close timetable to leadership	Mon 12 Oct	In progress
A-035	Dana Whitfield	Thank-you note to board chair (Ellen)	No date set - flagged	Carried over
A-036	Tom Becker	Board cash flow forecast to Q2 2027	Fri 30 Oct	Open
A-037	Dana Whitfield	Board summary to Raj	Thu 15 Oct	Open
A-038	Priya Nair (lead; Tom Becker reviews)	TrailMart spring margin impact	Mon 19 Oct, before 9:30 AM ET	Open
A-039	Priya Nair	Thank-you note to Kevin Cho with Q2 end-cap proposal	Fri 16 Oct	Open
A-040	Luis Ortega	Brief agency on 20 temps from Sun 1 Nov	No date set - flagged (before Sun 1 Nov)	Open
A-041	Dana Whitfield	Review adding 5 more temps (Luis brings volume data)	Sun 15 Nov - flagged (Sunday)	Open
A-042	Executive Assistant	Propose new weekly meeting time	Wed 14 Oct	Open
A-043	Executive Assistant	Send approved minutes to all attendees	Mon 12 Oct, after Dana approves	Open

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Follow-up Email (DRAFT for Dana)

DRAFT for Dana - not to be sent until approved

To: Marcus Reyes; Tom Becker; Priya Nair; Luis Ortega; Janelle Ortiz

Subject: Minutes and actions - Leadership meeting, Mon 12 Oct 2026

Hi everyone, attached are the minutes and updated action tracker from today's leadership meeting (9:30–10:30 AM ET).

Key decisions:

- We accept the 14 linear feet for spring from TrailMart and will propose a Q2 end cap.
- We will start peak season with 20 temps from Sun 1 Nov, with a review on adding 5 more.

Please check your actions (A-031 to A-043) and reply by Wed 14 Oct, 12:00 PM ET if anything needs correcting.

Thank you.

Eddah Dena on behalf of Dana Whitfield.

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Draft Agenda Leadership Meeting

Tentative Date: Mon 19 Oct 2026, 9:30–10:30 AM ET

Mode: Teams (time may change as per A-042)

1. Board follow-ups: cash flow forecast; board summary to Raj (A-036, A-037) - 10 min
2. TrailMart: spring margin impact; end-cap proposal (A-038, A-039) - 10 min
3. Peak staffing and warehouse: agency briefing; racking quotes (A-040, A-033) - 10 min
4. Weekly meeting time proposal (A-042) - 5 min
5. Open actions review, including carry-overs (see table below) - 10 min
6. HR update (Janelle, if needed) - 5 min
7. AOB - 5 min

Open actions

ID	Owner	Action	Due	Status
A-031	Marcus Reyes	Revised freight contract summary (waiting on legal)	No date set - flagged	Carried over
A-033	Luis Ortega	3 warehouse racking quotes (2 of 3 in)	Fri 23 Oct	In progress
A-034	Tom Becker	Q3 close timetable to leadership	Mon 12 Oct	In progress
A-035	Dana Whitfield	Thank-you note to board chair (Ellen)	No date set - flagged	Carried over
A-036	Tom Becker	Board cash flow forecast to Q2 2027	Fri 30 Oct	Open
A-037	Dana Whitfield	Board summary to Raj	Thu 15 Oct	Open
A-038	Priya Nair (lead; Tom Becker reviews)	TrailMart spring margin impact	Mon 19 Oct, before 9:30 AM ET	Open
A-039	Priya Nair	Thank-you note to Kevin Cho with Q2 end-cap proposal	Fri 16 Oct	Open
A-040	Luis Ortega	Brief agency on 20 temps from Sun 1 Nov	No date set - flagged (before Sun 1 Nov)	Open
A-041	Dana Whitfield	Review adding 5 more temps (Luis brings volume data)	Sun 15 Nov - flagged (Sunday)	Open
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Clarify with Dana

Question	Recommendation
Three actions were given no date: • A-031 freight summary (Marcus) • A-035 board chair thank-you (you) • A-040 agency briefing (Luis)	The recommendations for each: • A-031 Fri 16 Oct • A-035 Wed 14 Oct (before the board summary to Raj on Thu 15 Oct) • A-040 Wed 14 Oct (agency needs lead time before Sun 1 Nov)
The temp review date "November 15th" falls on a Sunday.	Hold the review at the Mon 16 Nov leadership meeting.
Should the HR offer-letter step stay off the shared tracker?	Yes - Janelle tracks it privately; minutes and tracker say only "Discussed. Details held by HR."

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Task Log

Time taken: About 1 hr 40 min (11:45 PM to 1:25 AM Nairobi time), including revisions after review.

Hardest call: the temp-staffing decision changed late (25 → 20 after Tom's Q3 cash point), and speaker labels were wrong - "Speaker 3" and "Speaker 5" were Priya, and the 9:35 staffing line labelled Priya was Luis; "Trail Mark" corrected to TrailMart.

What I'd change: keep a battery/phone backup for live notes so I'm not relying on the auto-transcript.