

Using AI Tools (e.g. Otter.ai, Fireflies, Letterly) to Record Meetings and Generate Minutes

Overview

AI notetaking apps can record meetings, generate transcripts, summarize discussions, and help produce meeting minutes. If you don't have a pre-meeting agenda and all you need is the meeting summary, you can simply use a single app like the examples provided (Otter.ai, Fireflies, Letterly, etc..).

If you have a pre-meeting agenda, you have a choice to make. You can wait until the meeting has ended and then upload your meeting agenda and the meeting transcript generated by the AI notetaking app into a general AI assistant (e.g. ChatGPT, Grok, Gemini, Claude, Perplexity) to produce meeting minutes that adhere to the structure of your meeting agenda.

Or you can upload your meeting agenda before the meeting, and an AI notetaking app that supports pre-meeting uploads (e.g. Fellow) can organize the transcript into properly formatted meeting minutes (in other words, the minutes follow the same structure as the agenda), without the additional step of using a general AI assistant

Step-by-Step Guide

1. Choose an AI Notetaking App

Common tools include:

- Otter.ai
- Fireflies
- Letterly

2. Prepare Your Meeting Agenda

Create your agenda before the meeting.

Save the agenda as:

- Word document
 - Google Doc
 - PDF
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3. Start Recording the Meeting

At the beginning of the meeting:

1. Open the AI notetaking app
2. Click Start Recording
3. Alternative (if your meeting is fully online or hybrid)
 - a) If using Zoom or Teams, enable transcription
 - b) Or, if using a notetaking app such as Otter ai that the user can enable the meeting bot to automatically join the online/virtual meeting platform, the notetaking app will record the meeting and generate a transcript and summary.

Tips for better transcription:

- WiFi is much more predictable/stable than cellular. The longer the meeting, the more critical this point becomes.
- Before starting the actual agenda, ask speakers to introduce themselves (you can go further to increase accuracy of speaker identification by having speakers identify themselves by name and number – for example, “Tom Jones, speaker number 3....Fred Gellert, speaker number 4...”
- Speak clearly
- Ask meeting participants to avoid talking over each other. One person at a time.
- Try to stick to the order of the agenda (for example, if you are talking about budget, but someone suddenly shifts gears and starts talking about challenges the Club is facing attracting new members, that increases the potential for confusion and the need for manual editing after the transcript and summary/draft minutes are generated)

4. Generate the Transcript

When the meeting ends:

1. Stop the recording
2. Allow the AI to process the meeting

Depending on the notetaking app, the system will produce some or all of the following:

- Full transcript
 - Meeting summary
 - Speaker identification
 - Action items
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5. Generate Meeting Minutes

If you prepared a structured/formatted agenda for the meeting, you can upload the agenda and the transcript into a general AI assistant and ask the AI assistant to convert the transcript into structured minutes, using the structured/formatted meeting agenda.

Example prompt:

Convert this transcript into meeting minutes using the agenda format. Place discussion under each agenda item and list decisions and action items.

6. Review the AI-Generated Minutes

Verify that the minutes include:

- ✓ Agenda structure
- ✓ Key discussion points
- ✓ Decisions recorded
- ✓ Action items assigned

Edit as needed.

7. Export the Minutes

Export the final minutes as:

- Word document
- PDF
- Google Doc

Then distribute them to meeting participants.

Meeting Checklist

Before the Meeting

- Agenda created
 - Agenda uploaded to AI tool (if you are using an app such as Fellow that supports this option)
 - AI recording tool ready
 - Participants notified recording will occur
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During the Meeting

- Recording started
 - Speakers introduced themselves
 - Key decisions noted
 - Action items identified
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After the Meeting

- Transcript generated
 - Upload agenda and transcript into general AI assistant app
 - AI minutes generated using agenda
 - Review and edit as needed
 - Minutes exported and shared
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Potentially Helpful AI Prompts

Generate Meeting Minutes

Convert this transcript into structured meeting minutes using the agenda format.

Extract Action Items

List all action items mentioned in the meeting with responsible people and deadlines.

Executive Summary

Provide a 5-bullet executive summary of the key decisions from the meeting.