

# ClearSkies.

## Episode 6

### From Meeting Notes to Momentum

Stop Taking Notes. Start Mining Conversations.



# WELCOME to Clear Skies

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# Tell Us More

What's your primary method for capturing meeting notes?

I type them myself

I handwrite notes

Someone else takes notes

I use an AI note-taking tool

I rely on my memory (and hope for the best)

AI note-taking tools can automatically identify action items and assign them to the correct people.

True

False



# *Poll Results*

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Insights and feedback from today's live session.



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“AI meeting tools let you capture the conversation, but the real value comes when you process that conversation through your business judgment, your voice, your follow-up style, and your workflow.”





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#### What is Plaud?

<https://plaud.ai> is both a “real world” device and service to easily process and store your recordings.

- Phone app and web app. Can bring in recordings from other sources (phone recorder / computer audio capture app).
- Great for In-person meetings, Quick Huddles, 1:1s, Phone Calls, “Don’t let me forget this” voice notes.





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#### What is Fathom?

<https://fathom.video/> is an AI meeting assistant for scheduled online meetings.

- Joins Zoom, Google Meet, or Microsoft Teams meetings
  - Records and transcribes calls / Creates summaries and action items
  - Can automatically send meeting follow ups to attendees
  - Allows searching your meetings - across multiple meetings as well
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- Great for Customer calls, Vendor meetings, Sales Calls, Interviews, Project Follow-ups, Internal team meetings.
  - Can be setup to share across internal teams!
  - Can Sync meeting insights or Provides API access to summaries, transcripts, and action items for custom workflows into tools like Slack, Salesforce, HubSpot, Notion, Asana, and others





# *Real World Use*

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What's it like to use these tools?



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#### Episode Thesis

Most people think the value of a meeting recorder is that it saves you from taking notes. That's useful, but it's not the real unlock.

The unlock is when your conversations become reusable business context. You can revisit what was said, extract the moments that mattered, find the decisions, draft the follow-up, and use your own logic to turn a messy conversation into momentum.



*"Meetings take up a lot of time, anyway...  
Why not record them for reference short and long-term?"*



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What's this "your" business?

(your business judgment, your voice, your follow-up style, and your workflow.)

If you haven't trained the language models yet on

- WHO you are (strengths AND weaknesses)
- HOW you like to communicate (style, tone, grammar and punctuation)
- Preferences and things that are important to you

You're missing a huge productivity lens for EVERYTHING you do... including meeting summaries and takeaways, email drafting, proposal writing, etc.





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Resources to Teach Your AI Your Voice:

ChatGPT - Custom Instructions, Memory, Projects, and custom GPTs. Best for building reusable writing/context workflows.

<https://help.openai.com/en/articles/8096356-chatgpt-custom-instructions>

Claude - Profile instructions, project instructions, styles, project knowledge, and prompt engineering guides.

<https://support.anthropic.com/en/articles/10185728-understanding-claude-s-personalization-features>

Microsoft 365 Copilot - Custom instructions, prompt framework, Outlook draft instructions, and writing-style guidance.

<https://support.microsoft.com/en-us/microsoft-365-copilot/customize-how-microsoft-365-copilot-responds-to-you>





# *What's On Your Mind?*

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Let's open it up: Questions, insights, success stories,  
and yes—even printer complaints.



# *Thank You for Joining Us*

Here's to smarter workflows, and more time for  
what matters most.

Thank you for being with us today.