

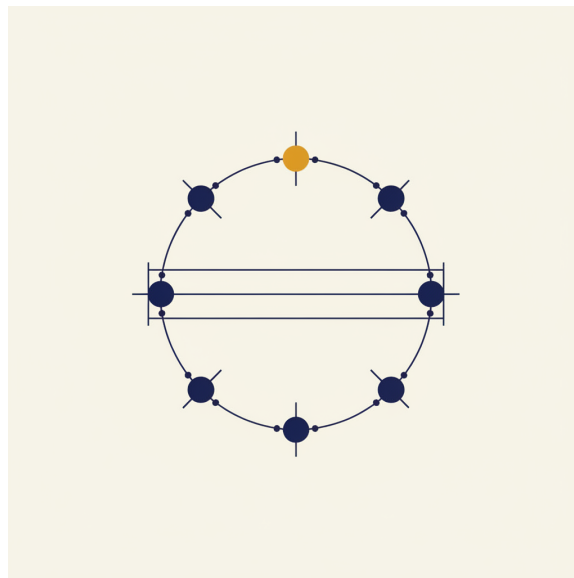


TIER 2 - WORK APPLICATION \* V1.0 -- MAY 2026

# AI IN MEETINGS

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Note-taking, follow-ups, action-item extraction. Tool comparison (Otter, Granola, Fathom, Zoom AI, Read.ai). The two-pass workflow that turns a one-hour meeting into a five-minute write-up. And the privacy callout most articles skip.



**BY**

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v1.0 -- May 2026

Working adults who sit through too many meetings and want to leave each one with a real record -- not a fading memory of what was said and a vague action item written on a napkin

15-20 minutes

Free. Forever.

**EDITION**

**AUDIENCE**

**READ TIME**

**COST**

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## SECTION 1

# The meeting tax

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### Most meetings end with a fading memory

You sit through an hour-long meeting. Three things were decided. Five action items got assigned. Two of them were assigned to you. By the time you're back at your desk fifteen minutes later, you remember maybe three of the five action items, you've already lost the exact wording of one of the decisions, and the action item you were supposed to take has somehow become "uh, follow up about the thing."

This is the meeting tax: the cumulative cost of attention going into a meeting and not coming out the other side. For most working adults, it adds up to hours per week of work that didn't happen because the inputs to the work got lost between conference room and desk.

AI changes the shape of this. Used well, every meeting ends with a clean transcript, an action-item list, a follow-up draft already written. Used badly, you've added a privacy risk and a creepy-vibe to your meetings without solving the problem you started with.

This module is the difference. The workflow that recovers the meeting tax without crossing into the legal-or-creepy territory.

### What you'll have by page 13

By the end of this primer:

- A  
What each one's good at.
- The
- The  
record, when you can but should disclose.
- **Three worked sessions** -- internal team meeting, client call, hostile vendor meeting.
- The
- The

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***The hour-long meeting becomes a five-minute write-up only if the capture happens during, not after. The post-meeting recall problem isn't solved by better discipline -- it's solved by removing the recall step entirely.***

## SECTION 2

# The two-pass workflow

### The two-pass meeting workflow:

**Pass 1 -- Capture during the meeting.** Either an AI tool (Otter, Granola, Fathom, etc.) records and transcribes, OR you record on your phone with permission. The output is a raw transcript. Don't try to take notes manually while AI is also capturing -- that splits attention and produces worse results on both fronts.

**Pass 2 -- Refine after.** Open the transcript in AI. Ask for: a 200-word summary, a clean action-item list with owners, and a draft follow-up email or Slack message. Five to ten minutes. Send before you leave the office.

That's it. The whole point is to remove the lag between meeting-end and write-up. The action items go to the people who own them within an hour, not the next morning.

## Why the two passes

Pass 1 has to happen during the meeting because the audio is gone afterward. AI transcription tools do this passively; they don't require attention from you.

Pass 2 has to happen right after because that's when your context is freshest. By tomorrow you've forgotten which "we should think about that" was actually a decision and which was just a brainstorm.

Most people do neither pass. They take half-attention notes during, lose half of them, and write up the meeting two days later from memory. The result is a worse write-up and the action items don't move.

### SECTION 3

## Tool comparison

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Snapshot of the major AI meeting tools as of mid-2026. The space moves; the framework outlasts the rankings.

**Otter (\$16/mo personal, \$30/mo business)** -- the original AI transcription tool. Strong on call-recording for sales conversations and 1-on-1s. Decent on meetings. Solid speaker identification. Integrates with Zoom, Teams, Google Meet. recorded interviews. **Best for:**

**Granola (\$14/mo)** -- newer entrant, designed specifically for note-taking during in-person and video meetings. Runs locally on your Mac (privacy-friendly). Generates summaries and action items automatically. **Best for:**

**Fathom (free / paid tier)** -- popular among sales teams. Records, transcribes, summarizes Zoom and Teams meetings. Free tier is real and usable. meeting schedules. **Best for:**

**Zoom AI Companion (included with paid Zoom)** -- built into Zoom. Generates meeting summaries automatically. No external tool needed. Quality is OK; doesn't match dedicated tools but it's already there. **Best for:**

**Read.ai (free / paid tier)** -- meeting summaries with sentiment analysis (engagement scores, question density). Some teams find this valuable; some find it weird. signals about engagement; not for everyone. **Best for:**

**Native iOS Voice Memos + ChatGPT** -- the cheap version. Record on your phone (with consent, see Section 4), upload the audio file to ChatGPT (or paste a transcript from another transcription tool), ask for the summary. Works fine for solo client calls and informal team meetings. people who don't want a subscription and meet less than 5 times a week. **Best for:**

### One-line tool selection:

- **Heavy Zoom user, paid plan already** -> start with Zoom AI Companion. It's free with what you have.

- **Mac user, deliberate about privacy** <sup>AI In Meetings</sup> -> Granola.
- **Sales-heavy** -> Fathom or Otter.
- **Light meeting load, don't want to pay** -> iOS Voice Memo + ChatGPT.

Pick one. Don't subscribe to two until you've actually used the first one for 30 days.

## SECTION 4

# The privacy callout -- recording laws

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This is the section most articles skip. It matters.

## Two-party consent vs one-party consent

In the U.S., recording laws vary by state:

- **One-party consent states** (most states): you can record a conversation as long as you're a party to it. Doesn't matter if the other person knows.
- **Two-party consent states** (~12 states including California, Florida, Pennsylvania, Washington, and notably for me here -- Wisconsin) without consent and you're committing a crime in many cases.

**For meetings that cross state lines** (you're in WI, the other person is in California): assume two-party consent applies. The stricter law usually wins.

**For business calls:** most professional contexts treat recording as something to disclose regardless of state. "Mind if I record this for my notes?" -- said at the start, gets a yes -- solves the problem.

## What this means in practice

- **Internal meetings with your own team** -- usually fine to record; verify your company's policy. Some companies forbid it; check before defaulting on.
- **Client calls** -- disclose at the start. Most people say yes. The few who don't, you take notes the old way.
- **Vendor meetings, sales pitches** -- disclose. The "I'm taking notes via my AI tool, OK with that?" framing is standard now and rarely gets pushback.
- **HR conversations, legal conversations, performance reviews** -- DON'T record. These have higher legal sensitivity, sometimes specific company policies, and recording without consent can transform a routine conversation into a legal incident.

- **Regulated industries** (healthcare, finance, legal) -- additional rules apply. Check with your compliance team before adopting any AI meeting tool.

### The disclosure script:

*"Before we get going, I want to mention I'm using an AI tool to take notes during this meeting -- it transcribes the audio and helps me build the action-item list. The notes stay on my end, not shared anywhere. Are you OK with that, or would you rather I take manual notes?"*

Said at the start of every external meeting. Memorize it. Most people say yes; the few who say no get manual notes.

## SECTION 5

# Three worked sessions

## Worked session 1 -- Internal team meeting

Weekly team standup. Six people on Zoom. 45 minutes. Mix of project updates and one decision about how to handle a delayed dependency.

**Pass 1:** Zoom AI Companion auto-records the meeting. You don't take any notes.

### Pass 2 (post-meeting, 8 minutes):

*"I just wrapped a 45-minute Zoom team meeting. The transcript is attached. Walk me through: 1. A 150-word summary of what was covered. 2. A clean action-item list with owner names. Use only the names that explicitly took ownership in the transcript -- don't infer. 3. Anything that sounded like a decision but wasn't explicitly closed (so I can flag it for follow-up). Then draft a 2-paragraph email I can send to the team within 30 minutes."*

The output: clean summary, 5-7 action items with owners, 2 flagged "decision-but-not-closed" items, and an email draft. You edit the email for tone (5 minutes), send it. The team has the recap before the next person's lunch ends.

## Worked session 2 -- Client call

You're on a discovery call with a prospect. 60 minutes. Lots of context about their business, their pain, their budget, their decision process.

**Pass 1:** You disclose at the start ("I'm using AI to take notes -- OK?"), they say yes. Otter (or Granola, or Fathom) records.

**Pass 2 (post-call, 10-15 minutes):**

*"I just finished a 60-minute discovery call with a prospect. Transcript attached. They're [brief role]. Walk me through: 1. A 200-word summary of their situation, their pain, and their constraints. 2. The 3-5 things they said about budget or decision process -- even if they hedged. 3. The questions they asked me that I should follow up on. 4. Three concrete next steps that fit what they said they need. Then draft a follow-up email I'd send within 24 hours, in my voice -- not aggressive, not begging, just clear."*

The output is a comprehensive recap + draft. You spend 15 minutes editing the draft for voice and send it. You also save the situation-summary into your CRM so the next call starts with context, not a re-introduction.

## Worked session 3 -- Hostile vendor meeting

A vendor's been delivering badly. You're meeting with their account manager and their VP to resolve. 45 minutes. The conversation will get tense.

**Pass 1:** You disclose at the start. ("I'm using AI for note-taking; we've got a lot to cover today and I want to make sure nothing gets lost.") They say yes. Records.

**Pass 2 (post-meeting, 15 minutes):**

*"I just finished a 45-minute escalation meeting with a vendor. Transcript attached. Walk me through: 1. The specific commitments they made -- exact dates, exact deliverables, exact owners on their side. 2. The things they hedged on or pushed back on. 3. The points where I made commitments that I need to follow through on too. 4. Anything in the transcript that suggests their internal posture (defensive, contrite, dismissive, professional). Then draft a recap email I'd send to all attendees within 4 hours that captures the commitments without re-litigating the conflict."*

This is the highest-value use of meeting AI. Accountability for a tense meeting, captured in writing within hours, creates pressure to follow through that nothing else does. The vendor's account manager will think twice about the next deliverable knowing you have receipts.

*The follow-up email sent within four hours of a tense meeting carries more weight than the same email sent the next day. The lag is the leverage; AI removes the lag.*

## SECTION 6

# What AI summaries miss

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The honesty rule. AI is good but not perfect. Things it consistently misses:

- **Subtext.** The pause before someone said "yes" when they meant "no." The "let me think about that" that was a real maybe vs the "let me think about that" that was a polite no. AI gives you the words; the body language and tone are gone.
- **Who actually said what credibly.** The transcript shows speaker A and speaker B. It doesn't always show that A is the decision-maker and B is just the proxy.
- **In-jokes and inside references.** A team's shorthand often doesn't translate. The "are we going to do the thing again?" reference might be a load-bearing question to your team and noise to AI.
- **Decisions that were implicit.** Sometimes a meeting "decides" something by everyone agreeing not to talk about it anymore. AI summaries often miss these.
- **The thing that DIDN'T get said.** The topic everyone avoided. The question nobody asked. Real meeting analysis sometimes turns on what's missing -- AI can't surface what isn't there.

The fix: don't accept the AI summary as the meeting. Use it as a draft. Add the human context -- the subtext you noticed, the implicit decisions, the avoided topics. Send the augmented version, not the raw one.

## SECTION 7

# When NOT to use AI in a meeting

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Three categories where AI doesn't belong:

- **HR, legal, performance reviews.** Recording consent gets murky here, and the conversation often turns on subtext that AI misses anyway. Take manual notes; have a witness if needed.

- **Confidential strategy meetings.** Anything where the meeting content would be a problem if it leaked -- competitive intel, M&A discussions, sensitive internal personnel matters. AI tools store the recording somewhere; the leak surface is real.
- **Meetings where the human you're meeting with would feel surveilled.** If they say no to recording, take it seriously. If they say yes but obviously feel weird about it, the meeting will go worse with the recording on. Read the room.

Within those limits, AI in meetings is one of the highest-ROI workplace applications available. Recovered hours per week, better follow-up, better accountability.

## SECTION 8

# Where to go from here

You have the meeting workflow. Eleven more modules ahead in the Tier 2 expansion:

- **AI for client communication** -- emails, status updates, asking for testimonials, deflecting tough situations. The voice-match problem.

After that: email backlog, SOP writing, proposals, project management, hiring, vendor research, sales calls, difficult feedback, upward communication, and the second-brain capstone.

***Get the next module the day it drops: [theaiguywi.com/training](https://theaiguywi.com/training)***

One email per release. No drip. No spam. Opt out anytime.

If you want this same meeting workflow installed across an entire team -- the disclosure scripts trained in once, the two-pass discipline adopted shop-wide, the privacy red lines drawn before someone records the wrong meeting -- that's the consulting offer.

***Reach out: [alexanderjahn79@icloud.com](mailto:alexanderjahn79@icloud.com)***

A short call. Honest scope. We figure out together if it's a fit.

## Closing -- the lock-in line

The meeting tax is real. AI doesn't make meetings shorter -- it makes the post-meeting work disappear. Five-minute write-up instead of forty. Action items moving the same hour, not the next morning. Accountability captured in writing while the conversation is still fresh.

# 5

### **Five minutes.**

That's the post-meeting write-up time once the workflow is installed. Compared to the half-hour-plus of trying to reconstruct what happened from memory, it's the highest-ROI workflow change most people can make to their week.

You have the workflow. Eleven more modules in this batch.

-- Alex

**Agent Logic --**

Lac, WI. This is module 7 of 18 in Tier 2 (Professional).

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*theaiguyn*