

Meeting Notes Workbook

From a recording or a page of scribbles to clean, usable notes — every time

This workbook turns whatever you walked out of a meeting with — a recording, a transcript, or a page of rough notes — into notes someone can actually act on. It covers what to hand over, the exact prompt to use for the clean-up pass, and what to check before it goes out. Print it, punch it, and keep a copy in the front of the binder.

Compiled for **Richard Radstone** · Edition — **July 2026** · Same design family as the AI Use Case Bible

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Capture, Convert, Confirm

STOP 1 — CAPTURE**Hand over whatever you have**

A recording, a transcript, or rough notes — no need to clean anything up first. Give it to Claude or ChatGPT as-is.

**STOP 2 — CONVERT****Let the AI do the organizing**

Ask for the structure you want: summary, decisions made, action items with owners and due dates.

**STOP 3 — CONFIRM****Check it before it goes out**

Verify names, numbers, and decisions against what was actually said. AI clean-up is fast — it isn't always right.

WHICH TOOL

- Either works for this — it's a light job for both. **ChatGPT** is the natural default for distilling a transcript and pulling out action items (see the AI Use Case Bible's Productivity section).
- **Claude** is worth a pass if the notes are going somewhere that needs to look polished — a client recap, a board summary, anything getting printed or forwarded as-is.

EXAMPLE PROMPTS TO TRY

"Here's the raw transcript from today's meeting. Turn it into notes: a short summary, decisions made, and action items with owners and due dates. Flag anything unclear rather than guessing."

"Here are my rough handwritten notes. Clean them up into: Purpose, Discussion, Decisions, Action Items, Open Questions."

"Compare this week's action items to last week's list — what's still outstanding?"

RECORDING, TRANSCRIPT, OR NOTES — ALL WORK

- **Recording (audio or video):** hand over the file directly — it gets transcribed first, then turned into notes from that transcript. No separate tool needed on your end.
- **Transcript** (Zoom, Teams, or similar): paste it in or upload the file as-is — this is the fastest path since no transcription step is needed.
- **Written or typed notes:** paste them in, or a photo of handwritten notes works too.

Recording consent rules vary by state and country — confirm what applies before you hit record. Avoid pasting sensitive personal information into any AI tool unless you've checked your organization's policy on it first.

Turning Raw Notes Into Clean Notes

WHAT TO PASTE IN

- The full transcript or your raw notes, as close to verbatim as you can manage — trimming too early loses context the AI needs.
- Who was in the room and their roles, if that isn't already obvious from the transcript.
- Anything you already know has to become an action item, so it doesn't get missed if it was only mentioned in passing.

THE PROMPT

"Turn the attached transcript (or notes) into meeting notes using this structure: Purpose, Discussion Summary, Decisions Made, Action Items (task / owner / due date), Open Questions, Next Meeting. Keep it factual — don't invent names, numbers, or decisions that aren't in the source. Flag anything ambiguous instead of guessing."

BEFORE YOU SEND IT

- ☐ Names are spelled correctly
- ☐ Numbers and dates match the recording or your notes
- ☐ Every action item has an owner attached
- ☐ Nothing sensitive got pasted in that shouldn't leave the room
- ☐ Decisions reflect what was actually agreed, not just discussed

IF THE SOURCE MATERIAL IS MESSY

- **Speakers aren't labeled:** tell the AI what you remember (roles, who spoke first) so it can attribute quotes and decisions correctly instead of guessing.
- **Handwriting or audio is unclear in spots:** mark the gap rather than skip it — "[unclear — pricing?]" gives the AI something to flag instead of silently filling in a guess.
- **Jargon or internal shorthand:** a one-line glossary at the top of your paste-in saves several rounds of the AI misreading acronyms.