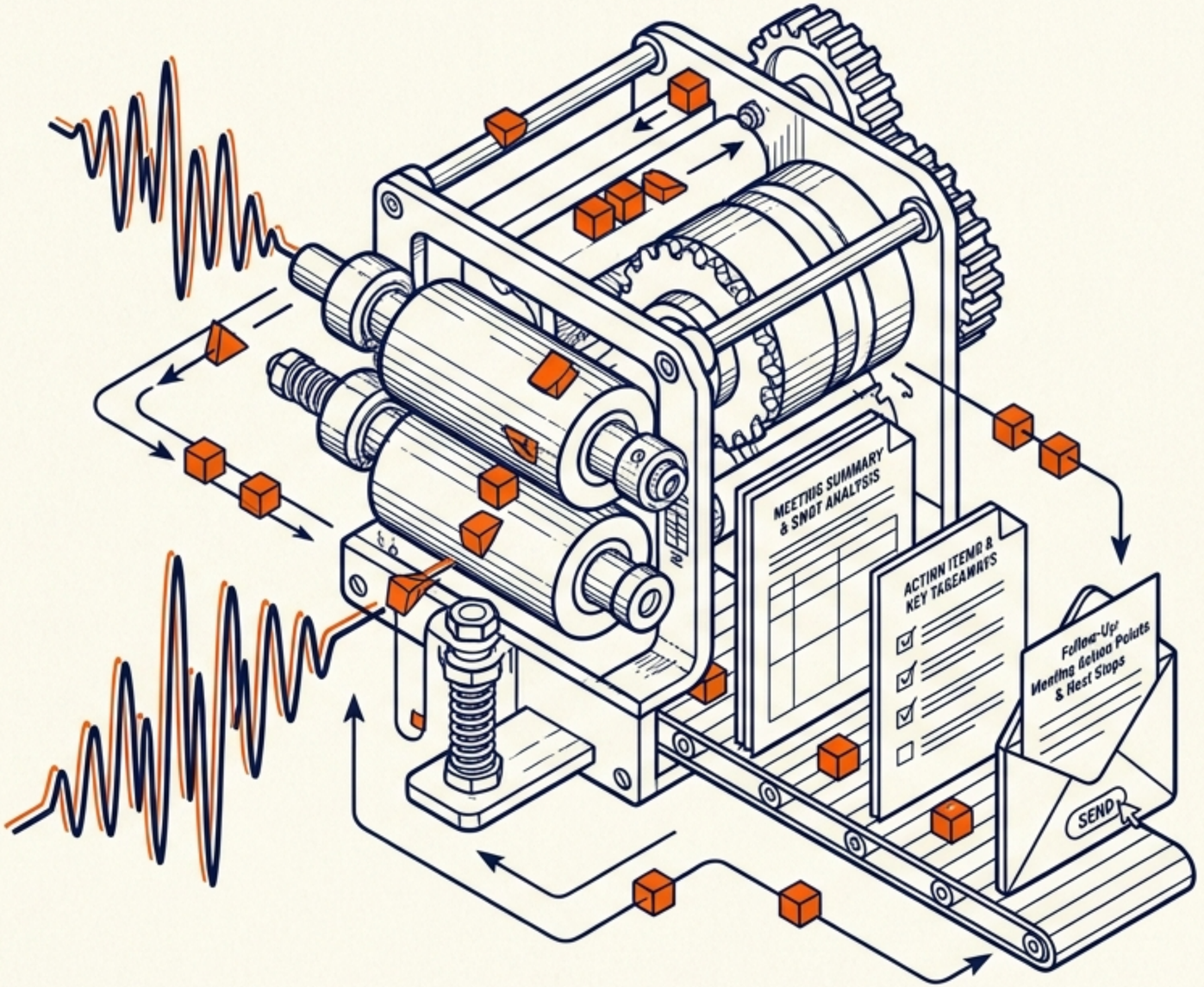
AUTOMATING THE MEETING WRAP-UP

A step-by-step blueprint for building a SWOT analysis and follow-up engine using Otter, Zapier, and Make.



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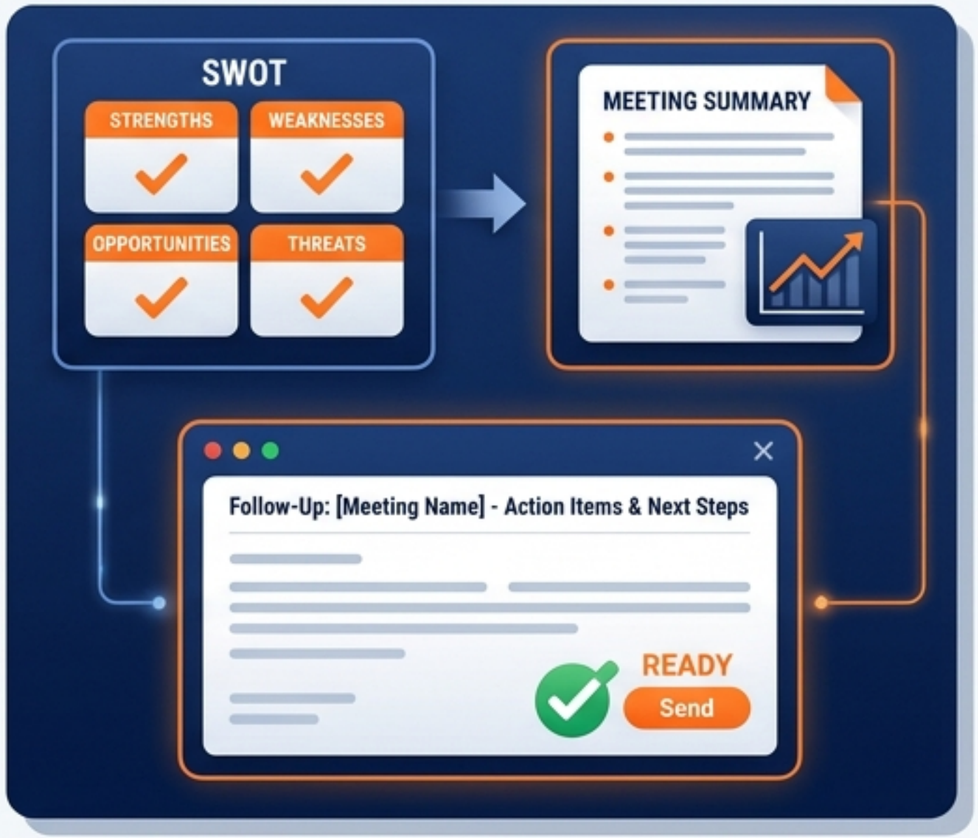
The Manual Cost of Follow-Ups Versus the Automated Reality

The Old Way

Spending hours post-meeting **manually** reading through raw notes just to properly outline to-dos, review your sales performance, and draft a follow-up email.

The New Way



A zero-touch automated assembly line. By the time you sit down at your desk, your meeting has already been transcribed, analyzed into a SWOT, and transformed into a drafted email waiting for your final approval.

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The Digital Factory Equipment and Materials

Otter.ai

The Note-Taker: Captures the raw material (audio) and transcribes the meeting text.

Zapier & Make

The Conveyor Belts: Automation platforms that transport data seamlessly between different software applications.

ChatGPT

The Inspector: The Large Language Model that analyzes the raw text, writes the summaries, and extracts key insights.

Tokens

The Fuel: The digital currency used to pay for the AI's computing power based on the length of text processed.

JSON

The Shipping Container: A structured format that packages data cleanly so different software tools can understand and organize it.

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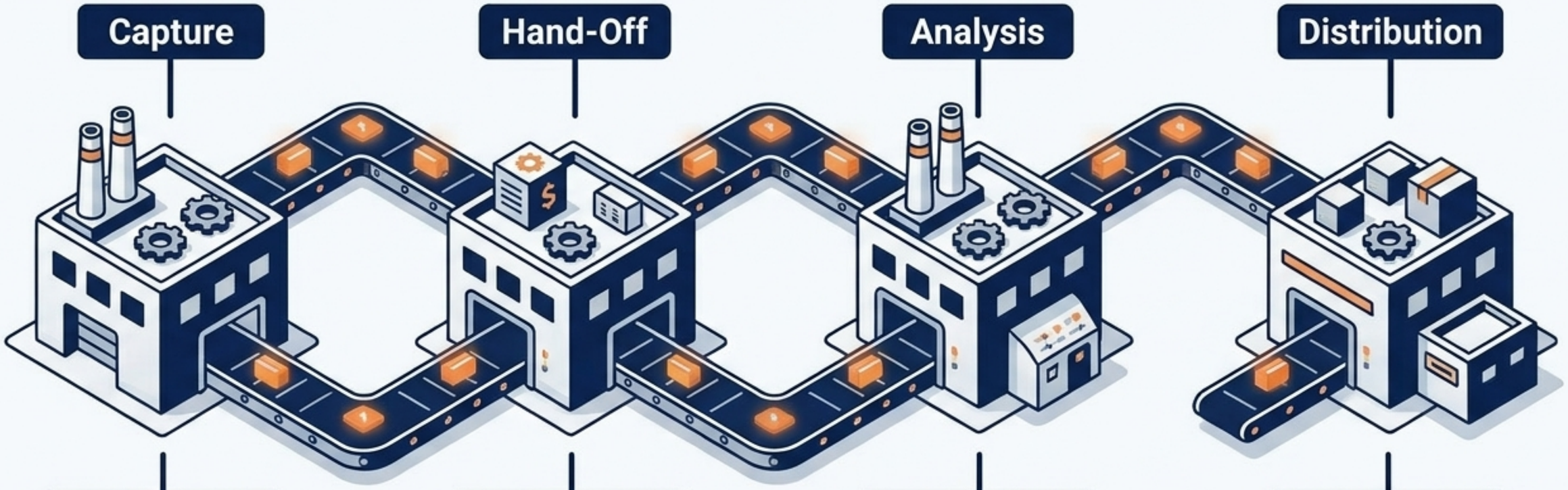
The Master Assembly Line Blueprint

A high-level view of the entire system architecture. Do not worry about the complexity yet; we are about to zoom into each station on this assembly line step-by-step.



Station 1: Otter

Station 2: Zapier to Google Drive

Station 3: Make to ChatGPT

Station 4: Make to Docs & Gmail

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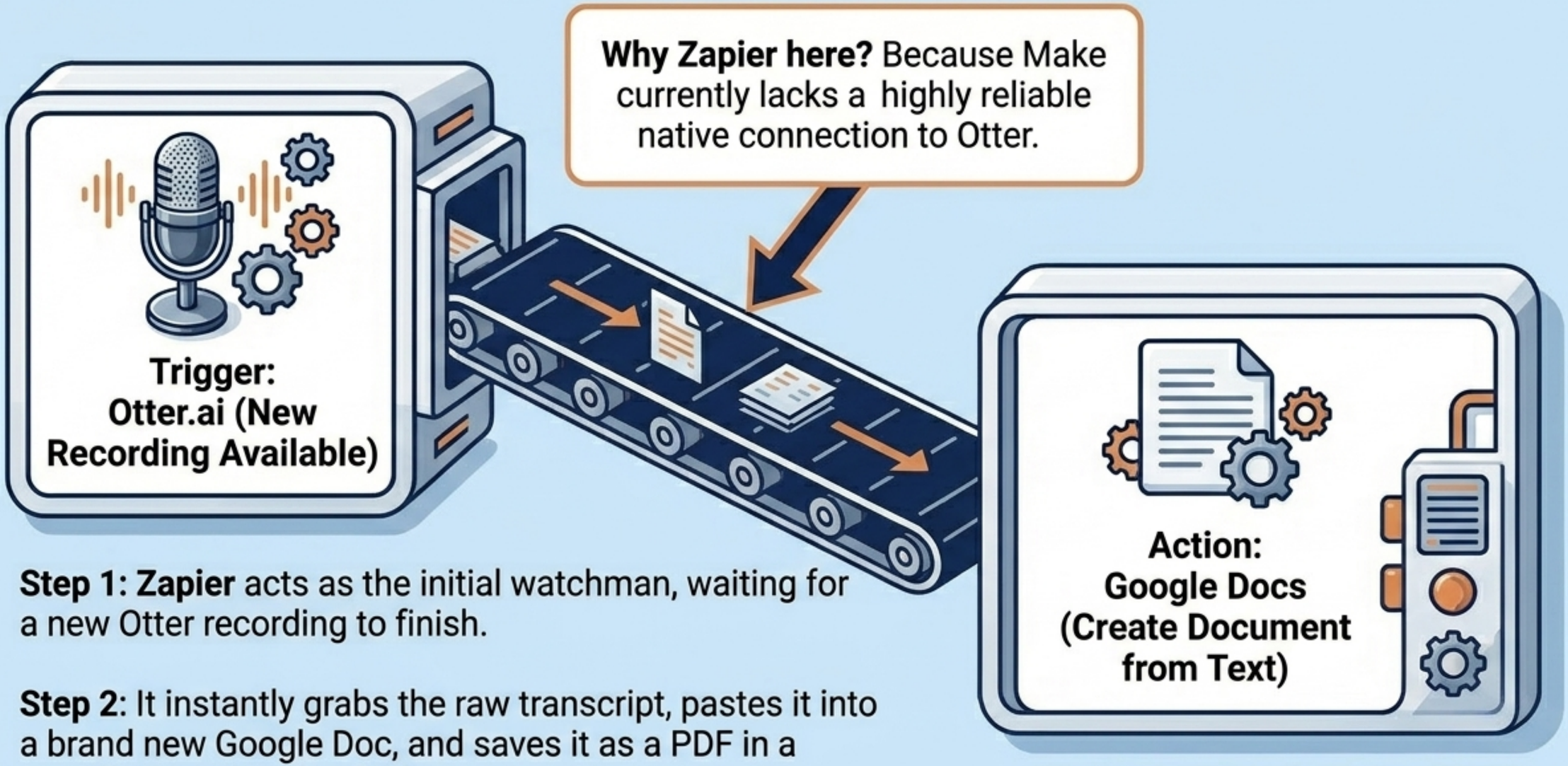
Station 1: Capturing the Raw Material



Step 1: Zapier acts as the initial watchman, waiting for a new Otter recording to finish.

Step 2: It instantly grabs the raw transcript, pastes it into a brand new Google Doc, and saves it as a PDF in a specific Google Drive folder.

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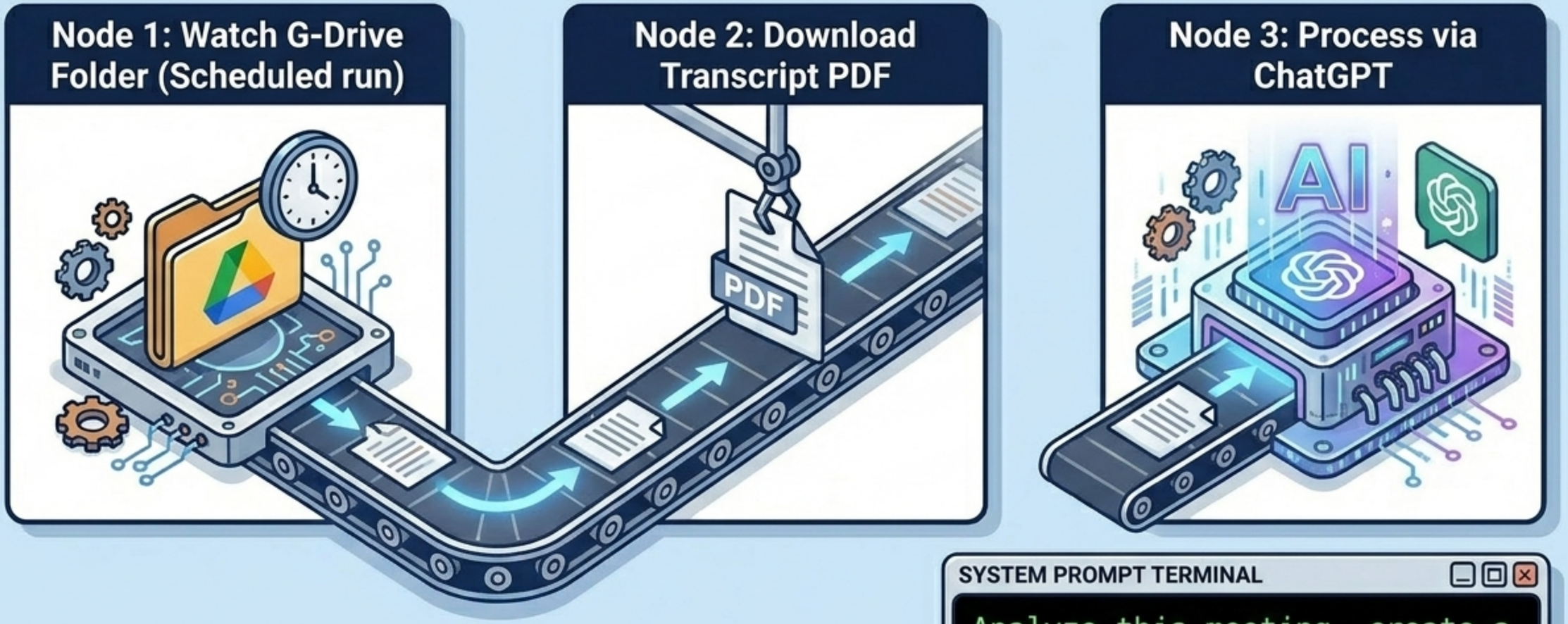
Station 2: Processing the Transcript with the AI Engine



Make.com acts as the master controller for the rest of the factory. It retrieves the raw transcript and sends it to ChatGPT with a highly specific system prompt:

SYSTEM PROMPT TERMINAL

```
Analyze this meeting, create a
SWOT analysis, summarize the
key takeaways, and draft a
follow-up email.
```

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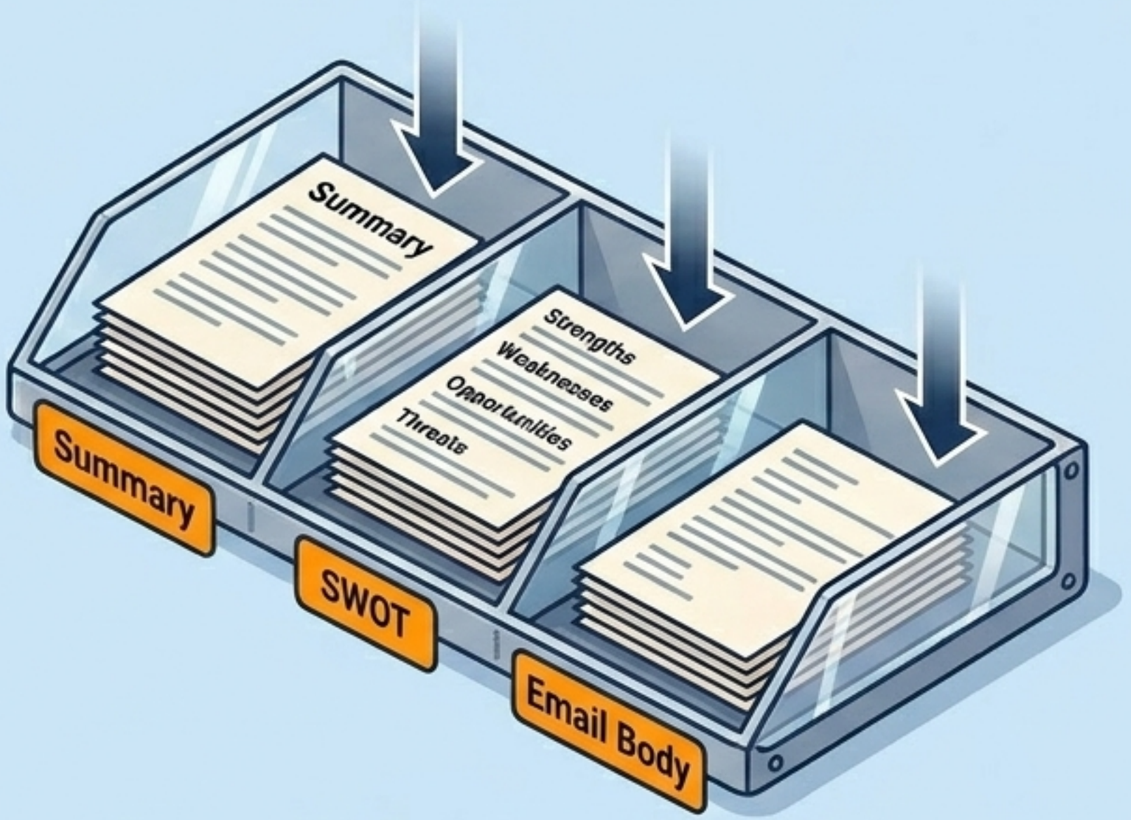
Structuring the Output: Understanding JSON

Unstructured Data

A brilliant summary, but output as a massive wall of text that other software tools cannot read or use.



JSON Data

JavaScript Object Notation is a set of rules that forces ChatGPT to place the Summary in one specific box and the SWOT in another, ensuring the next software tool knows exactly where to look.

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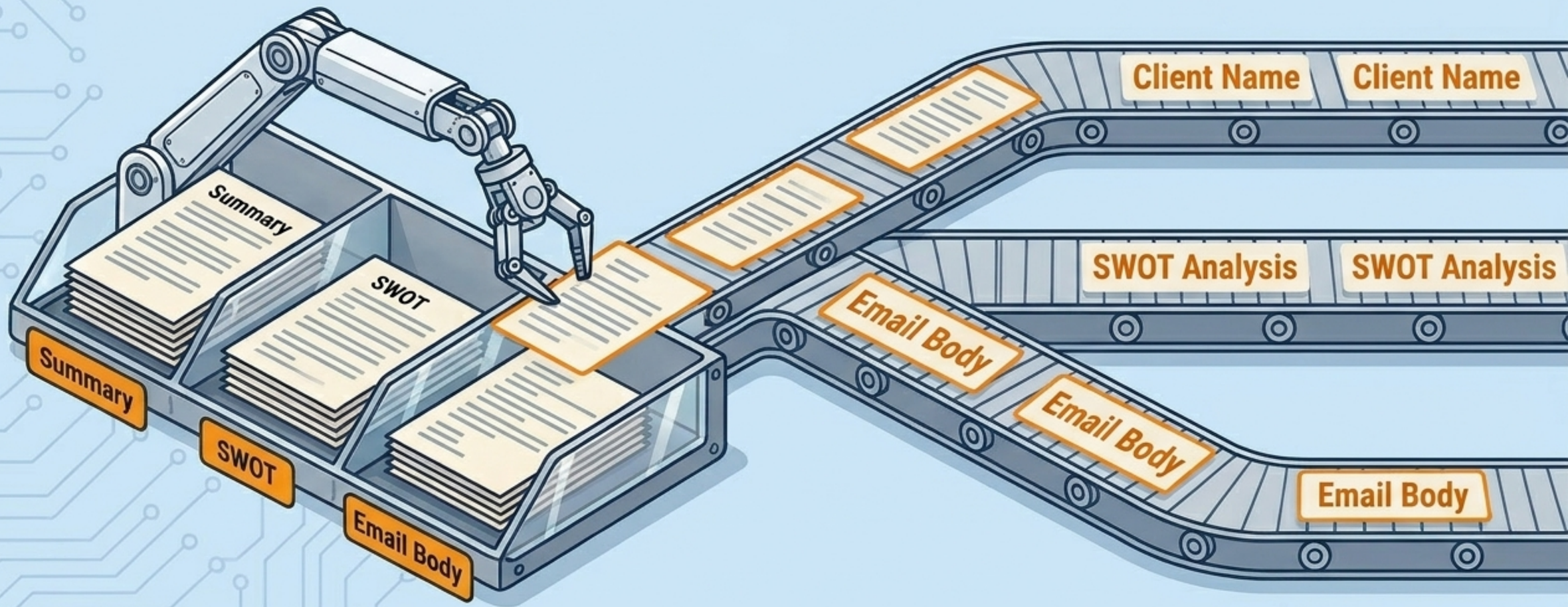
Sorting the Data Using a Parser

Parsing simply means reading the JSON file and splitting it up into usable pieces.

By inserting a **Parse JSON module into Make.com** immediately after ChatGPT, we grab the exact variables created by the AI so they can be routed individually into our final documents.



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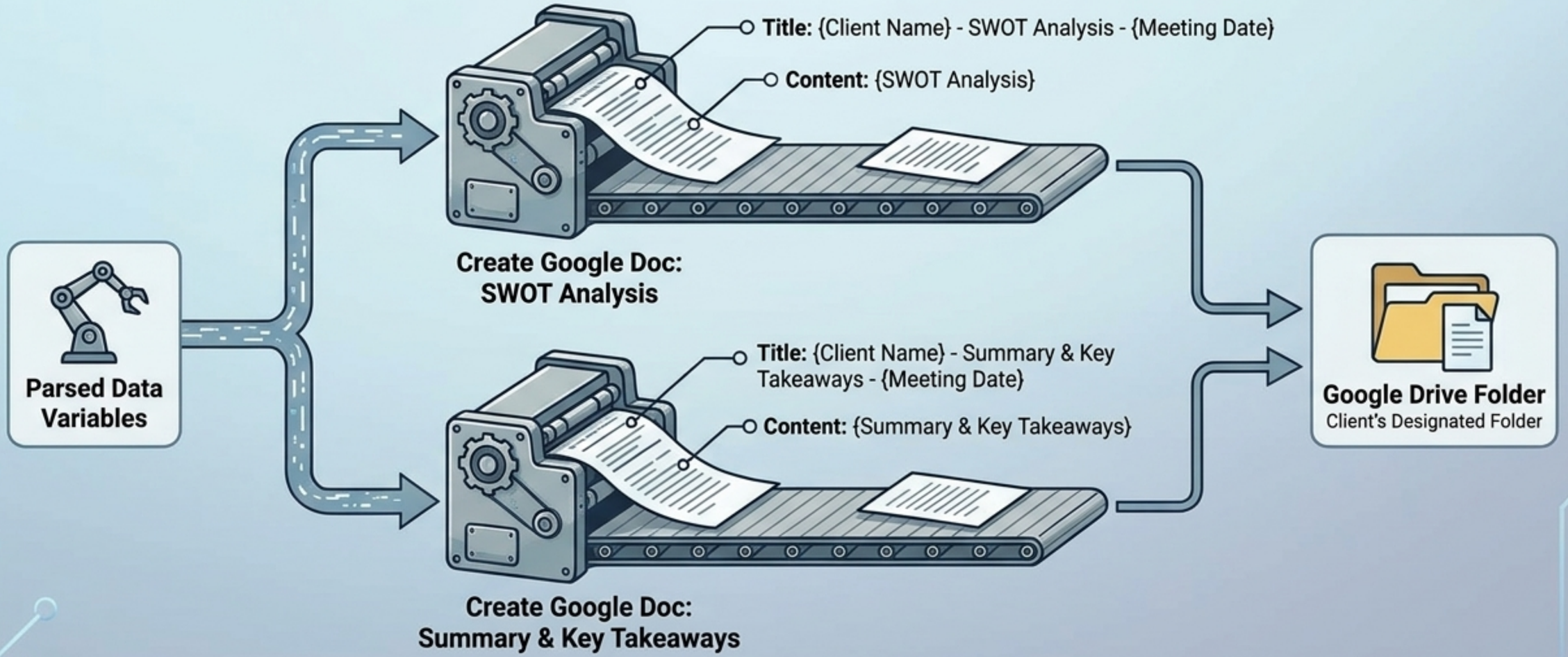
Station 3: Assembling the Final Documents

Make.com uses the specific variables extracted by the parser (such as the Client Name and Meeting Date) to automatically title the new documents and file them securely into the client's designated Google Drive folder.



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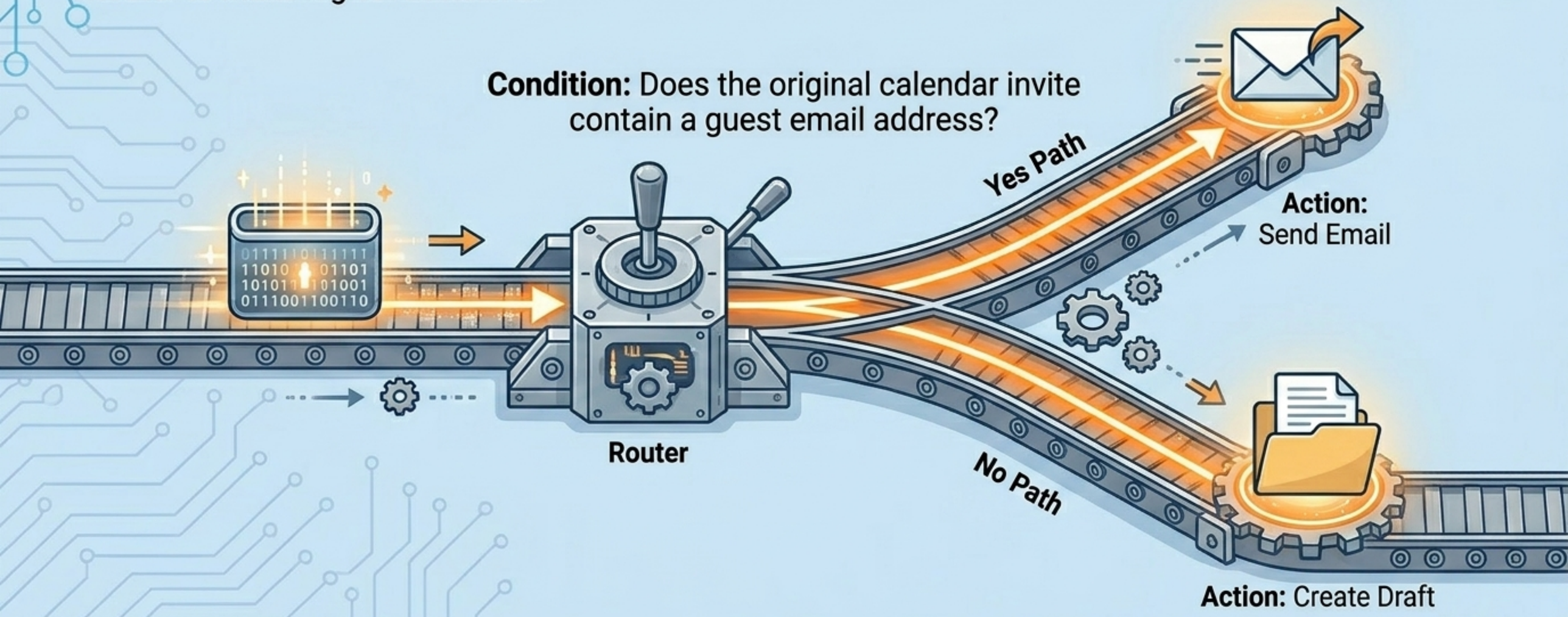
Station 4: Routing Data with Conditional Logic

How does the system know what to do with the drafted follow-up email? Make.com uses a Router to make logical decisions.



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Designing a Human-in-the-Loop Safeguard

A major concern when building AI automation is the fear of sending an unreviewed hallucination to a client. You are always in control.

Path A: Draft Created (Missing Email)

By configuring the final step to create a Gmail Draft, you force a human-in-the-loop safeguard. A human reviews the AI's email and manually provides the final approval before the client ever sees it.

Path B: Email Sent (Email Exists)

The automation only sends directly if explicit logic and historical data permit it.

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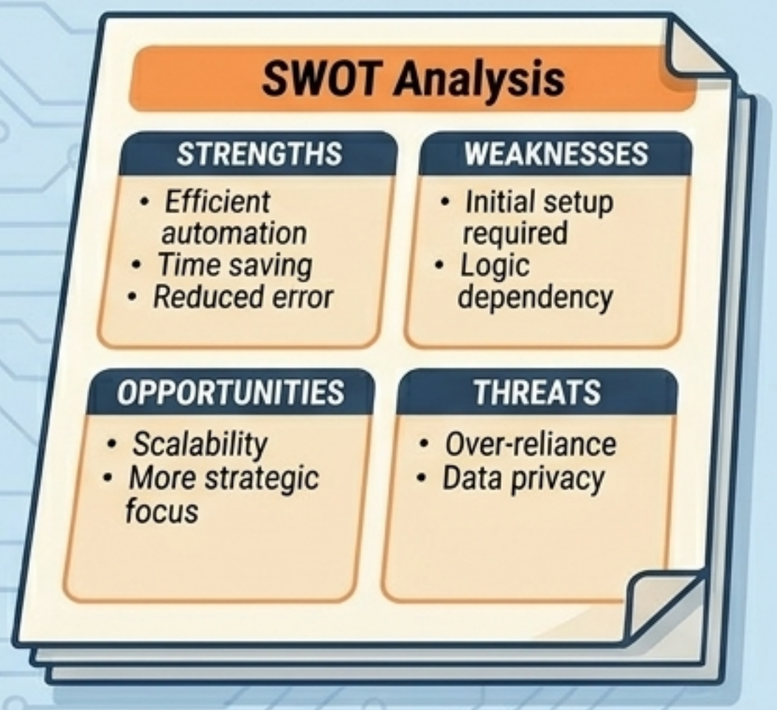
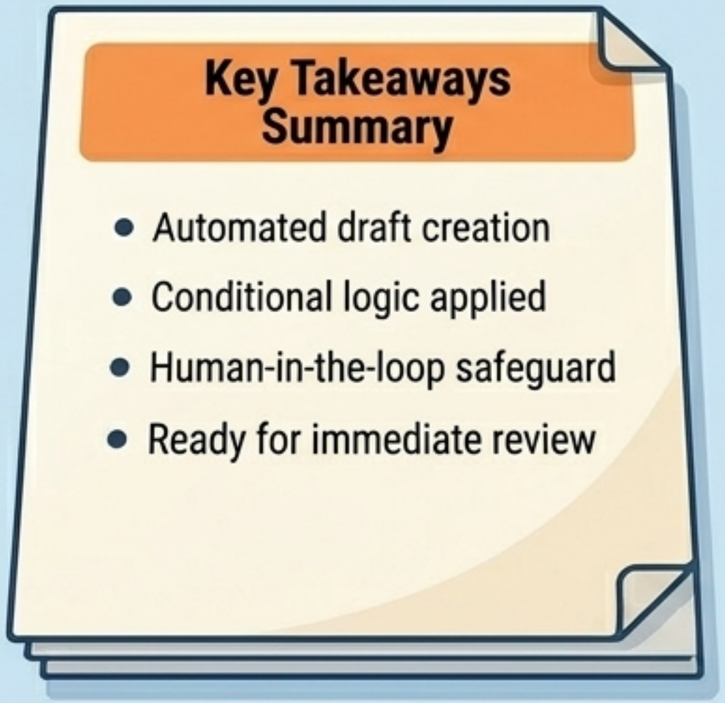
The Finished Product Waiting on Your Desk

This is the ultimate payoff. The automated assembly line runs silently in the background while you transition between calls. Instead of dreading a mountain of transcription review at the end of the day, you simply open your drive to find your work already completed by your digital chief of staff.

1. SWOT Analysis Document



2. Key Takeaways Summary



3. Polished Email Draft

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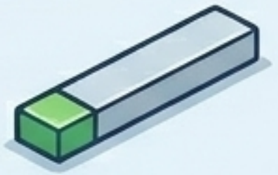
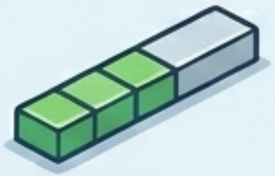
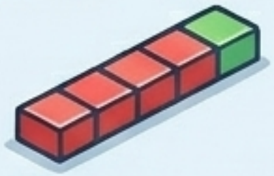
Selecting the Right Conveyor Belt for Your Needs

	Zapier	Make.com	n8n
Primary Use Case	Simple A-to-B routines	Complex multi-step logic	Developer-level bespoke systems
Cost & Token Efficiency	Highly expensive at scale	Incredibly affordable	Self-hosted maximum efficiency
Learning Curve & Connections	 Easiest to use, most native connections (e.g. Otter)	 Highly visual interface, moderate learning curve	 Steep learning curve, ultimate control

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Managing Your API Token Consumption

Why not just dump your transcripts directly into the Claude or ChatGPT web interface? Because heavy usage quickly burns through expensive subscription limits.

Running this process as a background automation via an API costs mere pennies per run, saving your premium chat interface limits for complex, creative, and interactive brainstorming sessions.

Web Interface

High Limit Risk & Expensive Compute

API Automation

Pennies Per Run & High Efficiency

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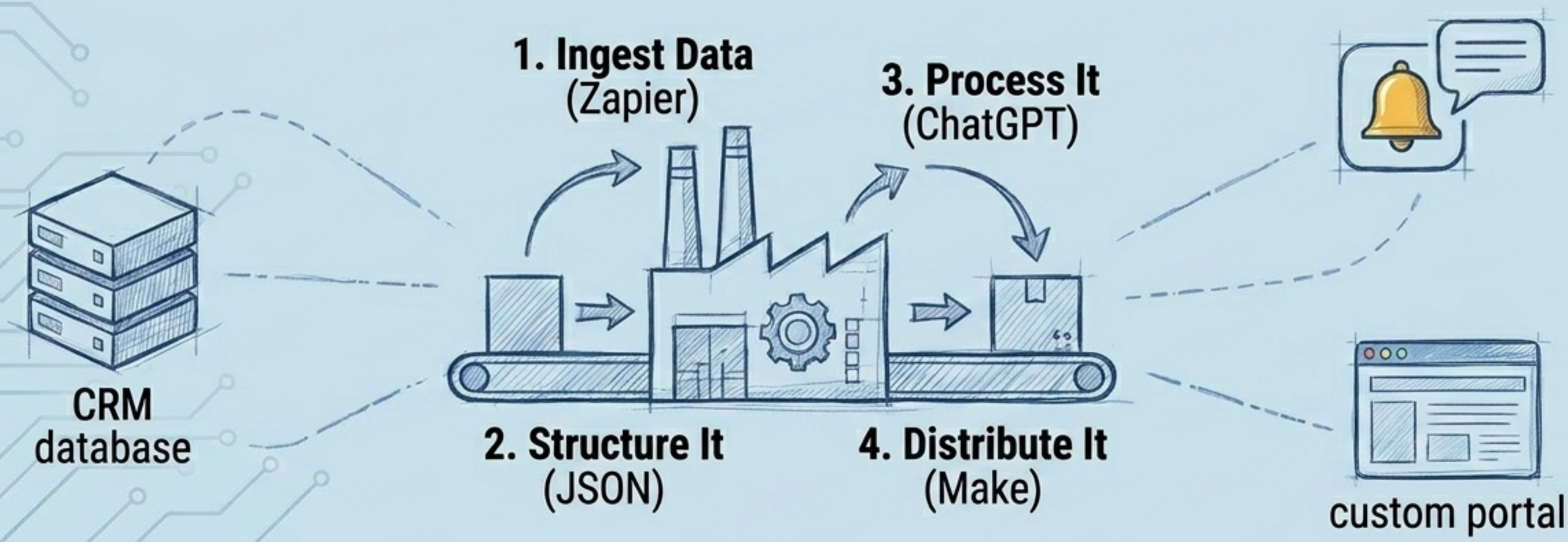
Adopting the Digital Builder's Mindset

Do not just copy this specific recipe; learn how the kitchen works. Once you understand the core mechanics, you can build anything.



The true power of automation lies in stringing these digital Lego blocks together to solve your unique business bottlenecks.

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