

Using AI for Minutes and Note-Taking

RSG Cheat Sheet

These instructions use free tools already integrated with RSG's systems. There are many note taking tools available. Specifically, the recommendation here is for using Co-Pilot transcriptions and note taking, integrated into MicroSoft Teams meetings.

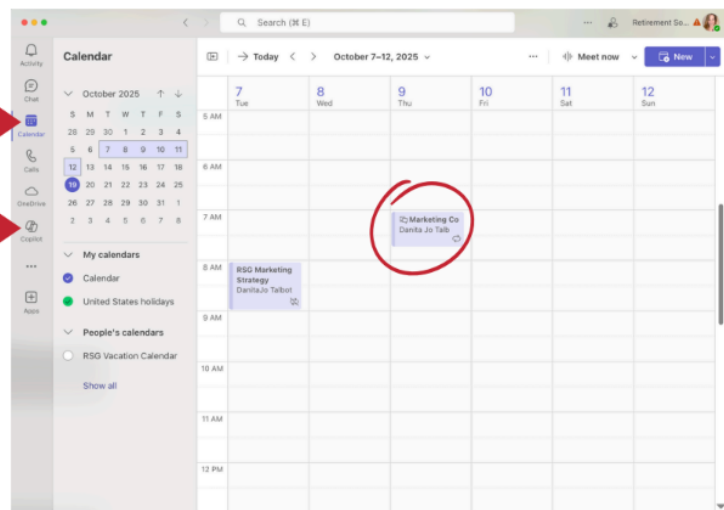
As always, please refer to the [Working Smarter with AI](#) tips and tools shared at the September 2025 All Hands meeting.

USING CO-PILOT IN TEAMS

Microsoft 365 Integrations

- Calendar Meetings
- Co-Pilot

Cheat Sheet:
Using AI for Minutes and
Note-Taking
(found on RSG's Marketing-Resources page)

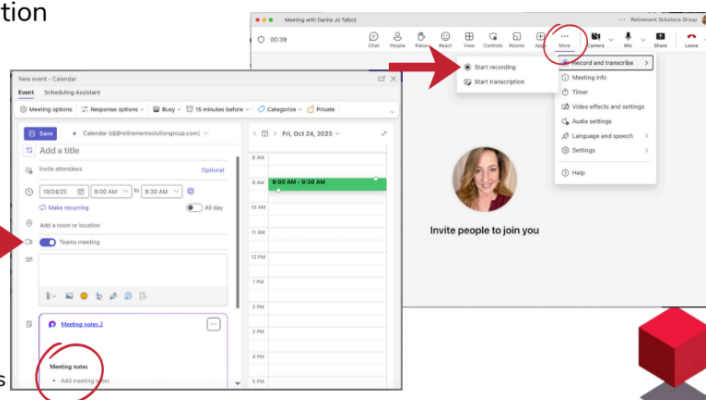


Before the meeting

1 Enable Transcription

Toggle Teams Meeting

Optional: add Meeting notes

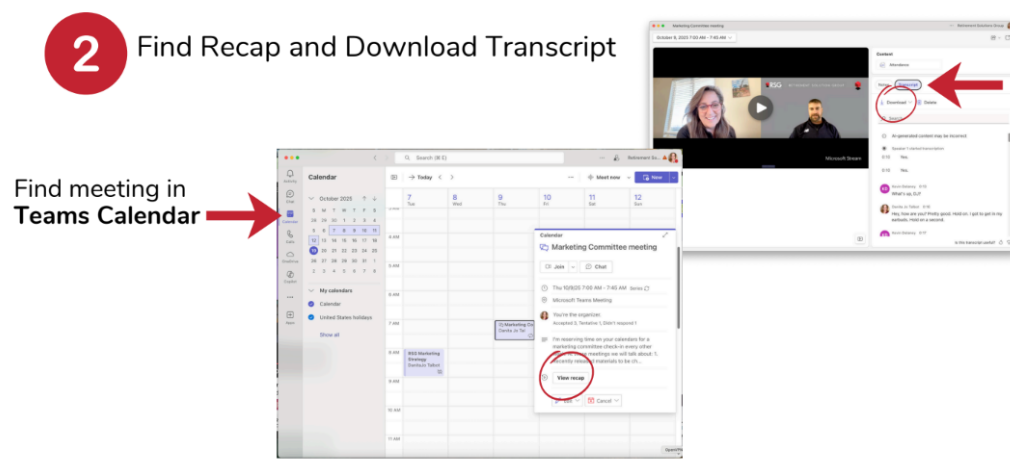


- **Enable transcription:** AI notes require a transcription to be enabled.
- **Schedule the meeting:** Schedule a meeting in Teams. Toggle **Teams Meeting** to enable AI notes during the invitation process.
- **Get consent:** Inform participants that the meeting will be recorded and transcribed. You can do this in the meeting invitation or at the beginning of the meeting.

During the meeting

- **Start the transcription:** Click the "More" menu (three dots) in the meeting window and select "Record and transcribe," then "Start transcription".
- **Select language:** You may be prompted to select the meeting's language.
- **Monitor the transcript:** A live transcript will appear on the side of your meeting window, but you can close the window without stopping the transcription.

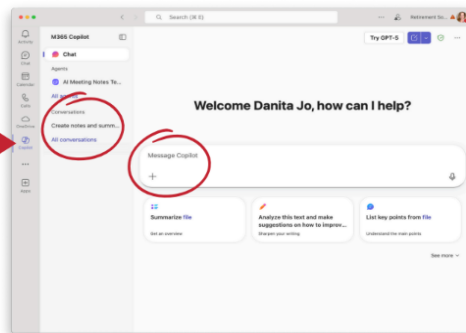
After the meeting



- **Find the recap:** After the meeting ends, go to the meeting calendar or chat and find the "View recap" option or a "Recap" button.
- **Download the Transcript:** Hit **Transcript** button and download as a **.docx file**
 - Open this meeting transcript document in Word and make any edits necessary. Save (create file name, inputting date).
- **Use M365 Co-Pilot to summarize:** Ask Co-Pilot questions about the meeting, get summaries, follow ups etc.

3 Us Co-Pilot to summarize

Integrated
Co-Pilot



» **Prompt: (copy and paste)**
Create notes and summary of meeting based on this document. Analyze the document and also create a list of to do items. Format this into a shareable PDF as well as an email draft for the team.



- **Step 1:** Open Co-Pilot **In Teams**, click icon in left menu
 - You may be asked to authenticate Microsoft account. This requires you to use your authentication credentials (sent to your phone).
 - **Step 2:** Prompt Co-Pilot with this: "Create notes and summary of meeting based on this document. Analyze the document and also create a list of to do items." This prompt will be saved in your Conversations
 - **Step 3:** Hit "+" and select Upload the meeting transcript document, choose the correct file and click the **blue arrow**
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- **Review** the AI results. Ask it more related questions as needed.
 - **Save** the results: Prompt Co-Pilot to "format this into a shareable PDF and email draft for the team"

SAMPLE (SIMPLE) PROMPTS

- » Email Drafting:
"Write a polite follow-up email to a client who hasn't responded in two weeks. Keep it professional, concise, and friendly."
- » Meeting Summary:
"Summarize this meeting transcript into 3 key decisions and 5 action items, in bullet points."
- » Data Analysis:
"Analyze this sales data (paste table) and highlight 3 key trends and opportunities."
- » Brainstorming Ideas:
"Give me 5 creative ideas for engaging customers in a loyalty program."

