

AI Bootcamp Week 2 Example

Fathom Transcript

Atlas

Example Fathom-Style Client Meeting Transcript - 2026-06-11

Example artifact for AI Bootcamp only. This is not a real client meeting. It is a realistic fake transcript designed to show how one messy meeting artifact can populate a company brain across Meetings, People, Projects, Workflows, Content, SOPs, and Receipts.

Meeting Metadata

- **Meeting title:** BrightPath Wellness x Northstar Ops - Front Desk Follow-Up Workflow
- **Date:** 2026-06-11
- **Time:** 10:00-10:31 AM ET
- **Duration:** 31m 12s
- **Meeting type:** Client workflow discovery
- **Recording tool:** Fathom-style meeting capture
- **Transcript language:** English
- **Meeting URL:** <https://zoom.example.com/j/brightpath-northstar-example>
- **Replay URL:** <https://fathom.example.com/share/example-brightpath-workflow>
- **Summary URL:** <https://fathom.example.com/share/example-brightpath-workflow?tab=summary>

Attendees

- **Maya Chen** - Operations Director, BrightPath Wellness
 - Email: maya.chen@example-brightpath.com
 - Role in workflow: owns intake quality, staff training, and weekly operations reporting.
- **Dr. Lena Ortiz** - Founder / Clinical Director, BrightPath Wellness
 - Email: lena.ortiz@example-brightpath.com
 - Role in workflow: approves patient-facing policy changes and compliance-sensitive messaging.
- **Jordan Ellis** - Workflow Consultant, Northstar Ops Studio
 - Email: jordan.ellis@example-northstarops.com
 - Role in workflow: designing the first agent-ready workflow map.
- **Sam Patel** - Automation Specialist, Meridian Automation
 - Email: sam.patel@example-meridianauto.com
 - Role in workflow: evaluating integrations with HubSpot, Google Workspace, and the phone system.

Fathom-Style Summary

BrightPath Wellness wants to reduce missed follow-ups after prospective patients call or submit a website form. The team currently uses a shared Gmail inbox, HubSpot, RingCentral call logs, Google Sheets, and a weekly staff meeting to track open leads. The workflow is inconsistent because front desk staff rely on memory, sticky notes, and manual spreadsheet updates.

The first workflow candidate is **New Patient Inquiry Follow-Up**. The trigger is a missed call, voicemail, website form, or inbound email from a prospective patient. The desired output is a daily follow-up brief that lists each lead, current status, missing information, recommended next action, and any item requiring human approval.

The group agreed that an AI agent should not send patient-facing messages without review. The first safe version should draft follow-ups, organize open leads, flag missing context, and create a daily review packet for Maya. Dr. Ortiz must approve any change to clinical language, pricing language, insurance language, or cancellation policy language.

Decisions

- Start with **New Patient Inquiry Follow-Up** as the first workflow.

- Use HubSpot as the source of truth for lead status when HubSpot and Google Sheets disagree.
- Keep Google Sheets as a temporary backup tracker until HubSpot stages are cleaned up.
- Do not let an agent send patient-facing messages automatically in version one.
- Build a daily review brief before attempting automated sending.
- Create a BrightPath Voice and Compliance Rules note before any prompt writes patient-facing copy.

Action Items

- **Maya Chen:** export one week of missed calls, voicemails, form submissions, and follow-up notes by Friday.
- **Dr. Lena Ortiz:** send approved language for insurance, pricing, cancellation, and privacy-sensitive disclaimers.
- **Jordan Ellis:** create the workflow map, people notes, project note, source-system audit, and first daily-brief prompt.
- **Sam Patel:** confirm whether RingCentral call logs and HubSpot contacts can be exported or accessed through API/Zapier.

Transcript

00:00 - Opening

Jordan Ellis: Thanks everyone. The goal today is not to automate the whole front desk. The goal is to understand one repeatable workflow well enough that an AI assistant could help without creating risk.

Maya Chen: That makes sense. The pain point is follow-up. We are not bad at answering the phone, but when people leave voicemails or fill out forms after hours, things get messy.

Dr. Lena Ortiz: And I want to be careful. We are a healthcare-adjacent practice. I do not want an AI tool promising anything clinically or sending something that sounds too casual.

Sam Patel: Good guardrail. I am mostly here to understand what systems are involved so we know what the agent can read or export from.

03:12 - Current workflow

Jordan Ellis: Maya, walk us through what happens when a new patient inquiry comes in.

Maya Chen: If they call, RingCentral logs the call. If they leave a voicemail, one of the front desk coordinators listens and adds a note. If they submit the website form, it goes to Gmail and usually gets entered into HubSpot manually. Sometimes the person also gets added to our Google Sheet.

Jordan Ellis: Why both HubSpot and the sheet?

Maya Chen: HubSpot is supposed to be the real tracker, but the team trusts the sheet because it is easier to scan. The problem is the sheet is always slightly wrong.

Sam Patel: So HubSpot should probably be the system of record, but the sheet is the current human dashboard.

Maya Chen: Exactly.

07:40 - Where work breaks

Jordan Ellis: Where do leads fall through the cracks?

Maya Chen: Three places. First, voicemails after 5 PM. Second, people asking about insurance because those need a more careful answer. Third, when someone says they are not ready yet and asks us to check back in two weeks. Those reminders live in someone's head.

Dr. Lena Ortiz: The insurance piece matters. We can say which providers we commonly work with, but we cannot guarantee coverage. I want that language controlled.

Jordan Ellis: So one human review gate is anything involving insurance, pricing, privacy, or clinical claims.

Dr. Lena Ortiz: Yes. Also cancellation policy. People get upset if that is unclear.

12:55 - Desired output

Jordan Ellis: If the agent helped tomorrow but did not send anything yet, what would be useful?

Maya Chen: A daily list. Who contacted us, where they came from, what they need, who already replied, what is missing, and what the next action should be.

Sam Patel: Daily email? Google Doc? HubSpot task list?

Maya Chen: For now, a daily brief in Google Docs or email is fine. Eventually HubSpot tasks would be great.

Jordan Ellis: What would make you trust the brief?

Maya Chen: It needs links back to the original email, voicemail note, or HubSpot contact. I do not want a mysterious summary with no source.

17:30 - Source systems

Sam Patel: I hear five systems: RingCentral, Gmail, HubSpot, Google Sheets, and Google Drive. Is that right?

Maya Chen: Yes. Plus the website form, but it just lands in Gmail.

Dr. Lena Ortiz: We also have a folder in Drive called Front Desk Scripts, but it is outdated.

Jordan Ellis: That folder still matters because it shows current approved language, even if we need to mark it stale.

Maya Chen: We should create a new approved language document. The team keeps asking me what they are allowed to say.

21:18 - First safe version

Jordan Ellis: I would propose version one does three things. It collects the messy inputs, creates a daily review brief, and drafts suggested follow-ups for Maya to approve.

Dr. Lena Ortiz: I like that as long as patient-facing messages are drafts only.

Sam Patel: From a technical side, exports might be easier than direct API access at first. HubSpot has API options. RingCentral has exports. Gmail and Drive are easy enough. Google Sheets is easy.

Jordan Ellis: Good. That means version one can be semi-manual and still valuable.

25:44 - Project and ownership

Jordan Ellis: Let's name this project Front Desk Follow-Up Workflow.

Maya Chen: Works for me.

Dr. Lena Ortiz: I want Maya to own the operational version, but I want final approval on the approved language note.

Sam Patel: I will own the access review and confirm what we can pull from RingCentral and HubSpot.

Jordan Ellis: Great. I will create the workflow map and the first agent brief.

29:10 - Close

Jordan Ellis: The immediate homework is simple. Maya exports one week of examples. Lena sends approved language. Sam checks access. I will turn this meeting into a company-brain starter package.

Maya Chen: This is helpful because I can already see why the workflow feels messy. The data is not in one place, and the rules are not written down.

Dr. Lena Ortiz: Exactly. I am comfortable with the agent helping if we start with drafts and review gates.

Sam Patel: I will report back on HubSpot and RingCentral access by Monday.

Jordan Ellis: Perfect. That gives us enough to build a safe first version.

Raw Extraction Targets For The Bootcamp Exercise

Use this section to check whether Claude populated the vault correctly.

People to extract

- [[Maya Chen]]
- [[Dr. Lena Ortiz]]
- [[Jordan Ellis]]
- [[Sam Patel]]

Companies to extract

- [[BrightPath Wellness]]
- [[Northstar Ops Studio]]
- [[Meridian Automation]]

Projects to extract

- [[Front Desk Follow-Up Workflow]]
- [[BrightPath Voice and Compliance Rules]]

Workflows to extract

- [[New Patient Inquiry Follow-Up]]
- [[Daily Follow-Up Brief]]

Source systems to extract

- [[RingCentral]]
- [[Gmail]]
- [[HubSpot]]
- [[Google Sheets]]
- [[Google Drive]]
- [[Website Form]]

Human review gates to extract

- Insurance language
- Pricing language
- Cancellation policy language
- Privacy-sensitive disclaimers
- Clinical claims
- Patient-facing sends

Proof receipts to extract

- Original email link
- Voicemail note
- HubSpot contact link
- Daily review brief
- Maya approval

- Dr. Ortiz approved language note