

# Zapier Tutorial: Build a Zoom-to-Asana Workflow that Automates Task Creation

## What You'll Get

**A Zapier workflow that automatically converts Zoom meeting summaries into organized Asana tasks — eliminating manual note-taking and task entry after every meeting.**

This workflow runs automatically after each Zoom meeting, pulls the meeting summary, uses ChatGPT to extract action items, loops through each task, and creates individual tasks in your Asana project. Set it up once, never manually transcribe meeting notes again.

## What You'll Need

**Time:** 4–6 hours to set up (expect troubleshooting)

**Budget:** \$17-20/mo

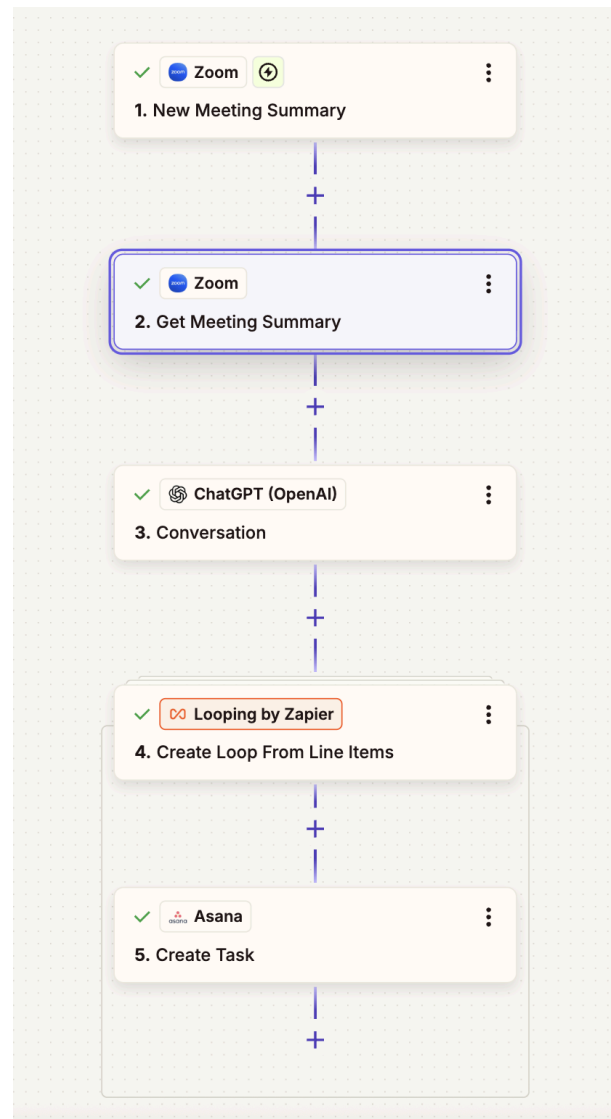
**Experience:** None required (some workflow history helpful for JSON, looping logic)

**Key tools:** **Zapier account** ([Free](#)\* for 100 tasks/mo) – connects all your apps

**Zoom Workplace Pro** ([\\$16.99/user/mo](#)) – required for meeting summaries

**OpenAI API key** ([\\$0.20-1/mo usage-based](#)) – Powers the AI analysis

**Asana account** ([Free](#) tier works) – creates and organizes tasks



## STEP 1

## PREPARE YOUR ZOOM ACCOUNT

**Function:** Ensuring Zoom can generate meeting summaries that trigger the workflow.

**Time:** 5 minutes

**Actions:**

1. Verify you have Zoom Workplace Pro or higher (free Zoom doesn't have meeting summaries)
2. In Zoom settings, enable "Meeting Summary" feature
3. Test by holding a short meeting and confirming a summary is generated

**Pro tip:** Meeting summaries are created automatically when a meeting ends. You don't need to do anything during the meeting.

**Done when:** You've confirmed Zoom generates a meeting summary after your test meeting ends.

## STEP 2

## BUILD YOUR ZAPIER WORKFLOW

**Function:** Creating the automation that captures meeting notes and converts them to tasks.

**Time:** 2-3 hours (includes troubleshooting)

**Actions:**

**1. Start a new Zap in Zapier**

- Click the orange "Create" button
- Select "Zaps"
- You can describe what you want and let Zapier Copilot help, or build manually

**2. Add Zoom Trigger: "New Meeting Summary"**

- App: Zoom
- Event: "New Meeting Summary"
- Meeting Type: Select "Meeting"
- Trigger Scope: "All new Meetings on my account"
- Connect your Zoom account when prompted
- Test the trigger to confirm it can see your meetings

### 3. Add Zoom Action: "Get Meeting Summary"

- App: Zoom
- Action: "Get Meeting Summary"
- Meeting UUID: Select "1. Meeting Details UUID" from the previous step
- "Successful if no search results found": Set to False
- "If multiple search results are found": Set to False
- Test the step to confirm it retrieves meeting summary text

### 4. Add ChatGPT Action: "Conversation"

- App: ChatGPT (OpenAI)
- Action: "Conversation"
- Model: gpt-4o-mini (balances cost and quality)
- **User Message:** "Organize this into tasks and output as valid JSON."
- **Instructions:**



#### STARTER PROMPT

Copy/Paste  
This Entire  
Section

Act as a product manager tasked with taking this meeting summary and converting them into tasks. Review this meeting summary creating all appropriate tasks which can be imported into our project management tool. Structure all tasks returned in JSON format using this format: {"tasks": [{"task": {"description": "the task description", "assignee": "task assigned to", "status": "Not Started | In Progress | Completed"}}, {"task": {"description": "the task description", "assignee": "task assigned to", "status": "Not Started | In Progress | Completed"}}]}

- **Response Format:** JSON Object
- **Tool Choice:** None
- Test the step to see ChatGPT extract tasks from your meeting summary

**Why JSON?** This structured format allows the next step (looping) to process each task individually.

### 5. Add Looping: "Create Loop From Line Items"

- App: Looping by Zapier
- Action: "Create Loop From Line Items"
- Create three value sets by clicking "Add value set":
  1. **Description** (from ChatGPT output)
  2. **Assignee** (from ChatGPT output)
  3. **Status** (from ChatGPT output)

**Important:** This is the trickiest step. The looping function captures each task from ChatGPT's JSON output so they can be added to Asana

individually. You may need to reference Zapier's looping documentation or use their copilot for help.

#### 6. Add Asana Action: "Create Task"

- App: Asana
- Action: "Create Task"
- **Workspace:** Select your workspace (Zapier will show your options after you connect Asana)
- **Project:** Select the project where tasks should be created
- **Section:** Select the section within that project (optional)
- **Task Name:** Click the + button and select "4. Create Loop From Line Items... → Description"
- **Assignee:** Select "4. Create Loop From Line Items... → Assignee" (if you want tasks assigned)
- Test the step to confirm tasks are created in Asana

#### 7. Test the entire workflow

- Click "Test Zap" or run it manually
- Hold a short Zoom meeting with a colleague
- After the meeting ends, check your Asana project
- Confirm tasks appear correctly

**Done when:** Tasks from your test meeting automatically appear in Asana with correct descriptions and assignees.

## STEP 3 REFINE THE CHATGPT PROMPT

**Function:** Teaching ChatGPT to extract the right tasks in the format your team needs.

**Time:** 30-60 minutes

#### Actions: 1. Review your first test results

- Did ChatGPT capture all action items?
- Are task descriptions clear and actionable?
- Are assignees being identified correctly?

#### 2. Customize the ChatGPT Instructions

Go back to your ChatGPT step and modify the Instructions field. Add specifics about your team:

**Example additions:**

Additional context:

- Our team members are: [List names]
- Always include due dates if mentioned in the meeting
- Flag tasks as "HIGH" priority if meeting notes say "urgent" or "ASAP"
- If no assignee is mentioned, assign to [default person]
- Break large tasks into smaller subtasks

**3. Add examples to improve accuracy**

You can add example outputs to the prompt:

Example good task:

```
{"description": "Send updated budget proposal to finance team",  
"assignee": "Sarah", "status": "Not Started"}
```

Example bad task:

```
{"description": "Stuff", "assignee": "Unknown", "status": "Maybe"}
```

**4. Test again with a real meeting**

- Run another Zoom meeting
- Review the Asana tasks created
- Keep refining the prompt until quality is consistent

**Pro Tip:** Save your prompt versions in a Google Doc so you can roll back if a change makes things worse.

**Done when:** 80%+ of tasks from meetings are captured accurately without manual editing.

## STEP 4 SET UP REGULAR USE

**Function:** Making this workflow part of your team's routine.

**Time:** Ongoing

**Actions:****1. Communicate to your team**

- Let everyone know that meeting action items will automatically go to Asana
- Remind people to speak clearly about action items and assignees during meetings
- Set expectations: "After each meeting, check Asana within 5 minutes"

**2. Create a review routine**

- After important meetings, have someone quickly review the auto-created tasks
- Edit any that need clarification
- Delete any that aren't actually tasks (ChatGPT sometimes captures discussion items)

**3. Monitor Zapier task usage**

- Free plan: 100 tasks/month
- Each meeting creates multiple tasks, so monitor your usage
- Upgrade to paid plan if needed (~\$20/mo for 750 tasks)

**4. Troubleshoot common issues**

- If tasks aren't appearing, check Zapier's task history for errors
- If assignees are wrong, improve the ChatGPT prompt with team member names
- If getting too many irrelevant tasks, adjust the prompt to be more selective

**Done when:** Your team trusts the automation and uses it for 80%+ of meetings.

## Quick Start Checklist

- ☐ Verified Zoom Workplace Pro or higher subscription
- ☐ Enabled "Meeting Summary" in Zoom settings
- ☐ Created Zapier account
- ☐ Built Zap with 6 steps: Trigger → Get Summary → ChatGPT → Loop → Asana
- ☐ Connected all accounts (Zoom, OpenAI, Asana)
- ☐ Tested with a real meeting
- ☐ Refined ChatGPT prompt based on results
- ☐ Communicated process to team
- ☐ Set up review routine for auto-created tasks

## Common Issues and Quick Fixes

### **"No tasks are being created in Asana"**

→ Check Zapier task history for errors. Most common: Zoom summary not generating or ChatGPT API key invalid

### **"ChatGPT is creating weird or irrelevant tasks"**

→ Refine the Instructions prompt with more specific guidance about what qualifies as a task

### **"Looping step is failing"**

→ Check that ChatGPT is outputting valid JSON. Use Zapier's formatter to validate the JSON structure

### **"Assignees aren't being set correctly"**

→ Add your team members' names explicitly to the ChatGPT prompt

### **"I'm running out of Zapier tasks"**

→ Upgrade to a paid plan, or use the workflow only for important meetings

## Next-Level Enhancements

Once you have the basic workflow running for 4+ weeks, consider:

Add Meeting Type Filter	Create Subtasks	Set Due Dates	Send Slack Notifications
Only run workflow for specific types of meetings (e.g., client calls, sprint planning)	Have ChatGPT break complex tasks into subtasks automatically	Extract due dates from meeting transcripts	Notify team in Slack when their tasks are assigned

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## Want help building this?

### We Know This Workflow Inside and Out—Because We Built It for Ourselves

This tutorial gives you everything you need to build your own meeting-to-task automation. But we also know from experience that this specific workflow is **tricky**—it took us longer than expected and required our senior developer to troubleshoot the looping and JSON parsing.

### Three ways [Rocket Jones](#) can help

- **Done-For-You Setup:** Complete workflow built and customized in 3-5 days
- **Guided Build:** We guide you through the build and troubleshoot with you
- **Advanced Features:** Add filtering, subtasks, notifications, and more

Questions? Email us: [info@rocketjones.com](mailto:info@rocketjones.com)

*\*Zapier free plan (100 tasks/mo) sufficient for ~10-15 meetings/month. Upgrade to Starter (\$19.99/mo) for more capacity.*