

Should Fireflies.ai be introduced for customer meetings?

Standard Decision Brief - 12-user pilot across Sales, Customer Success, RevOps and leadership in a 45-person B2B team.

Vendor	Package	Pilot	Rollout
Fireflies.ai	Standard Decision	Conditional Go	No-Go until evidence gates close

Pilot

Conditional Go

30 days, 12 users, only customer/prospect meetings and internal account handoffs. No HR, legal, board, investor, M&A or special-category meetings.

Rollout

No-Go until evidence gates close

Broad rollout waits for subprocessor/transfer matrix, LLM/transcription vendor matrix, DPA clause map, retention model, export test and plan-fit proof.

Decision in one sentence: Fireflies.ai is acceptable for a controlled 30-day pilot with customer and prospect meetings because no-training, DPA basis, admin controls, export paths and Enterprise governance are documented; broad rollout stays blocked until subprocessors, LLM/transcription vendors, retention, privacy defaults and Enterprise plan-fit are evidenced.

1. Use case and scope

The team is not testing Fireflies as a generic note-taking toy. The real use case is a meeting-intelligence layer for recurring customer and prospect conversations where follow-ups, objections, commitments, account context and internal handoffs currently get lost across calls, CRM, Slack/Teams and notes.

Field	Scope assumption
Customer situation	45-person B2B team; 12-user pilot across Sales, CS, RevOps and leadership.
Primary use	Customer/prospect call capture, summaries, action items, account handoff and searchable meeting context.
Initial exclusions	HR, legal, board, investor, M&A, health/special-category data and confidential contract negotiations.
Integrations	Meeting platform and calendar only. CRM, API, webhooks and cloud-storage export stay off in first pilot.

2. Decision logic

Review field	Decision criterion	Status
AI/LLM processing	No training, feature-vendor matrix, retention/ZDR and plan relation.	Pilot acceptable; rollout proof needed.
DPA	Roles, instructions, Service Data, disposal, transfers and subprocessors.	Basis exists; clause map needed.
Subprocessors/transfers	Name, function, data category, country/region, retention/ZDR and change process.	Rollout blocker.
Admin/privacy/consent	Restrictive defaults, user groups, consent logic and meeting visibility.	Pilot test required.
Retention/export	Auto-delete, offboarding, recording modes, export and downstream copies.	Enterprise likely; pilot test required.
TCO/plan-fit	Cost at 12, 35 and 60 users with required controls.	Enterprise scenario must be budgeted.

3A. AI/LLM processing and training

Fireflies documents that meeting content, including audio, video, transcripts, summaries and derivatives, is not used for internal or external AI model training [\[FF-S05\]](#). Fireflies also describes restrictions for third-party vendors around training and retention after processing [\[FF-S05\]](#) [\[FF-S06\]](#).

Question	Evidence-based reading	Decision effect
Training on meeting content?	Official sources say no [FF-S03] [FF-S05] .	No pilot blocker.
Third-party model training?	Fireflies says vendors are restricted from training and retention after processing [FF-S05] [FF-S06] .	Positive signal.
Feature-level vendor mapping?	Not fully visible from public sources.	Rollout gate.
Region/ZDR per feature?	Not granular enough for rollout approval.	Written vendor confirmation needed.

Recommendation: Start the pilot only with low-risk customer/prospect meetings. Before rollout, request a feature-level LLM/transcription vendor matrix by provider, feature, region, retention/ZDR and plan.

3B. DPA and data roles

Fireflies provides a DPA. The useful question is not simply whether a DPA exists, but whether the actual pilot instructions are clear: permitted meeting types, prohibited meeting types, integrations, retention, export and ownership of defaults [\[FF-S02\]](#).

DPA point	Why it matters for this pilot
Customer instructions	Tool configuration becomes part of the processing instruction; weak defaults become a governance problem [FF-S02] .
Service Data	Operational, support, billing and product data must be separated from meeting content [FF-S02] .
Disposal	Contract-end deletion, return and legal retention need separate treatment [FF-S02] .
Transfers	DPF/SCC/UK IDTA references are relevant, but countries and recipients still need mapping [FF-S02] .

3C. Subprocessors and transfers

Subprocessors are central because customer calls can contain customer names, voices, objections, commitments, pricing, roadmap context and confidential business information. A 12-user low-data-class pilot can proceed, but a broad rollout needs a procurement-grade matrix.

Required field	Why it is needed
Subprocessor name	Contract and vendor-file review.
Function	LLM, transcription, hosting, analytics, support, email, storage or workflow.
Data category	Audio, video, transcript, summary, metadata, account data.
Country/region	Transfer and residency assessment.
Retention/ZDR	AI and transcription risk boundary.
Feature/plan relation	Business vs Enterprise; AI Skills, API, CRM and storage.
Change mechanics	Operationalizes the objection right.

Rollout blocker: Do not approve broad rollout until the subprocessor/transfer matrix is extracted and reviewed by the responsible owner.

3D. Admin controls, privacy defaults and consent

Fireflies is configurable, but not automatically safe. Public links, workspace visibility, first-inviter behavior, bot-free recording and AI Skills are control points, not footnotes [\[FF-S08\]](#) [\[FF-S09\]](#) [\[FF-S16\]](#) [\[FF-S17\]](#) [\[FF-S18\]](#).

Setting	Target state before meeting 1
Meeting visibility	Only Owner or Participants for pilot meetings [FF-S08] .
External sharing	Public links off; external sharing only by exception.
Pilot owner	Only defined pilot owners may invite Fireflies.
User groups	Sales, CS and leadership separated where plan allows [FF-S09] .
AI Skills	No self-created AI Skills without admin approval [FF-S18] .
Recording mode	Prefer transcript/summary-only where policy requires less permanent audio/video [FF-S11] .
Consent	Meeting invite or call-start notice agreed before pilot [FF-S16] .

3E. Retention, deletion and export

Auto-delete is Enterprise-only and applies to future meetings; admins can set workspace-level behavior, but this still requires a practical test [\[FF-S10\]](#). Fireflies documents account data export, transcript/summary/recording downloads and offboarding behavior [\[FF-S12\]](#) [\[FF-S13\]](#) [\[FF-S14\]](#).

Test	Success criterion
Export 10 pilot meetings	Transcript, summary, action items, speaker labels and metadata are usable outside Fireflies.
Delete one test meeting	Workspace deletion and downstream copies are identified.
Offboard one test user	Keep/delete/transfer behavior is documented [FF-S12] .
Recording mode	No permanent audio/video if pilot policy requires transcript/summary-only [FF-S11] .
Retention	Desired retention can be enforced at workspace level; otherwise Enterprise quote is needed [FF-S10] .

3F. Integrations and API

The first pilot should not activate CRM/API/webhook/storage automation. Otherwise the team stops evaluating Fireflies and starts evaluating a larger data-flow network.

Integration	Pilot status	Reason
Zoom / Google Meet / MS Teams	Allowed	Core function.
Calendar	Allowed for pilot users	Required for meeting capture context.
CRM	Off	Creates downstream customer data and deletion/export questions.
API / webhooks	Off	Wait until data model and deletion behavior are tested.
S3 / Box / cloud storage	Off	Additional storage location with its own retention model.
Bot-free/system-audio recording	Blocked or separately approved	No visible bot; higher transparency and consent risk [FF-S17] .

3G. TCO and plan-fit

Fireflies lists Business at 19 USD per seat/month billed annually and Enterprise at 39 USD per seat/month billed annually [\[FF-S01\]](#). Enterprise includes rollout-relevant controls such as Rules Engine, SSO + SCIM, Audit Logs, private storage, custom data retention, Transcript + Summary only mode, Super Admin Role and dedicated account support [\[FF-S01\]](#).

Scenario	Users	Likely plan	Unit price	Price anchor	Decision
Pilot	12	Business	19 USD	228 USD/month; 2,736 USD/year	Use only if Enterprise controls are not mandatory for pilot data.
Team rollout	35	Enterprise	39 USD	1,365 USD/month; 16,380 USD/year	Budget Enterprise if SSO, SCIM, audit logs, private storage or custom retention are required.
Full Ops rollout	60	Enterprise	39 USD	2,340 USD/month; 28,080 USD/year	No budget Go if the buyer only modeled Business pricing.

TCO trap: Do not buy against Business cost if the actual governance requirement forces Enterprise controls.

4. Pilot configuration

Control	Decision
Pilot	Yes: 30 days, 12 users.
Plan	Business only for low data class; request Enterprise quote in parallel.
Allowed meetings	Customer/prospect calls, internal account handoffs, implementation conversations.
Not allowed	HR, legal, board, investor, M&A, health/special-category data and confidential contract negotiations.
Integrations	Meeting platform + calendar only. No CRM/API/webhook/storage export in first pilot.
Required tests	Privacy default, consent, export, deletion, offboarding, recording mode, AI Skills controls.

Pilot phase	Test	Evidence
Before start	Admin baseline, visibility, pilot owners, meeting classes.	Screenshot / admin log.
Week 1	3-5 real low-risk meetings.	Summary/transcript/visibility check.
Week 2	Export, deletion and offboarding test.	Export package + deletion note.
Week 3	Recording mode, retention and AI Skills controls.	Test note + settings.
Week 4	Rollout/stop/extend decision.	Evidence sheet + vendor answers.

5. Rollout gates

Gate	Required proof
1	Subprocessor/transfer matrix by name, function, data category, country/region, retention/ZDR and plan relation.
2	LLM/transcription vendor matrix by feature.
3	DPA clause map covering Service Data, deidentified data, disposal, transfers and subprocessors.
4	Admin baseline with restrictive meeting visibility and defined pilot owners.
5	Retention/deletion model for workspace, user, meeting, export and downstream systems.
6	Export test with a usable evidence package.
7	Enterprise quote or written confirmation that Business covers all required controls.
8	SOC 2 Type II report or equivalent security artifact in the procurement folder.

6. Verification questions for Fireflies

#	Question
1	Which LLM, transcription, hosting, storage, analytics and support subprocessors are used in the selected plan?
2	Which features use OpenAI, Anthropic or other LLM providers: summary, AskFred, AI Skills, Voice Agents, Conversation Intelligence?
3	Does Zero Data Retention apply to all third-party processing in the selected plan and for all enabled features?
4	Which data is stored or processed in the United States by default, and which private-storage options exist for international/EU customers?
5	Are SSO, SCIM, Audit Logs, Custom Retention, Rules Engine, Super Admin and Transcript + Summary only mode included in the quote?
6	Can CRM/API/webhook/storage export be disabled workspace-wide or restricted to admins?
7	How is deletion after contract end, account deactivation and backup retention implemented in practice?
8	Is a SOC 2 Type II report available under NDA, and which audit period does it cover?
9	How are subprocessor changes communicated, and how can the customer operationalize the objection right?
10	Which support/admin access to meeting content is possible, and how is customer permission documented?

7. Final recommendation

Verdict	Pilot approved. Broad rollout not approved. Fireflies has enough documented vendor evidence to justify a controlled 12-user pilot for low-risk customer/prospect meetings. It does not yet have enough rollout-grade evidence for broad use with sensitive meeting content, integrations, retention, subprocessors and Enterprise controls.
Expansion question	The next decision should not be 'Fireflies yes/no'. It should be whether Fireflies can expand after the pilot with Enterprise controls, a completed evidence file and signed-off proof for subprocessors, LLM/transcription vendors, retention, export, privacy defaults and plan-fit.
Decision boundary	Final legal, privacy or security approval remains with the responsible owners. This brief prepares the decision by separating documented claims, unresolved evidence, pilot conditions and rollout gates.
Evidence detail	The attached workbook contains all 18 sources, 46 claims, verification queue, TCO model and source register.