

## AI CALL NOTES · 2026

# Let the Phone Do the Typing

Your team types during calls and again after them. Both cost you. What changes when the notes write themselves, and how to keep them right.

## ■ The same call, taken twice

|                | Typing                   | AI notes                           |
|----------------|--------------------------|------------------------------------|
| Listening      | Split with the keyboard  | Full attention on the caller       |
| Key detail     | Valve location missed    | Heard, repeated, in the transcript |
| Promise        | "I will get someone out" | "Plumber rings within the hour"    |
| After the call | Two minutes writing      | Thirty seconds checking            |
| Record         | Written from memory      | Based on what was said             |

## ■ The minutes after every call (illustrative, Erlang C)

| 5 people, 30 calls in busy hour, 5 min talk | 3 min wrap-up | 1 min wrap-up |
|---------------------------------------------|---------------|---------------|
| Each call occupies someone for              | 8 min         | 6 min         |
| Team busy                                   | About 80%     | About 60%     |
| Callers who wait                            | About 55%     | About 24%     |
| Average wait                                | About 4.5 min | About 45 sec  |

### Why two minutes matters so much

Queues are not linear. When a team is busy, every call that runs a little longer pushes all the calls behind it back. **Wrap-up is queue time that nobody counts**, and some callers who wait four minutes hang up and never ring back.

## ■ Five speaking habits for accurate notes

- 1 **Read numbers back.** Fifteen and fifty sound alike on a bad line.
- 2 **Spell names** that could go several ways.
- 3 **Say promises precisely**, with a deadline.
- 4 **Say who is doing what.**
- 5 **Say what you looked up.** Silent screen reading never reaches the note. Finish with a recap.

■ Check before you save: four Ps and a plus

| Check       | Ask                                             |
|-------------|-------------------------------------------------|
| Person      | Right customer, name spelled right?             |
| Particulars | Numbers, dates, times, addresses right?         |
| Promises    | Every commitment there, nothing invented?       |
| Parties     | Each task on the right person?                  |
| Plus        | Anything known but unsaid? Add a line, approve. |

**The dangerous error: a task nobody agreed to**

Language models add what usually happens next, so a summary may say "follow up with a site visit" when nobody mentioned one. Read each action item and ask: did anyone actually say this? Correct, do not rewrite, and check straight after the call.

■ Summary formats by industry

| Business      | First line                 | Leave out       |
|---------------|----------------------------|-----------------|
| Trades        | Customer, suburb, job type | Haggling detail |
| Allied health | Patient, reason for call   | Clinical detail |
| Property      | Property, caller role      | Opinions        |
| IT support    | Client, ticket, severity   | Passwords, ever |
| Hospitality   | Name, date, party size     | Card details    |

■ Callbacks and handovers that do not start from zero

- Show the last summary when a known number rings, before anyone says hello.
- Every approved promise becomes a task with its deadline and owner.
- End of day list of open promises replaces "anything I need to know?" at the door.
- Transcript behind every summary for complaints and disputes, with a short access list.

■ The notetaker nobody approved

- No notice to the caller.
- Data in a personal account, often offshore.
- Leaves when the staff member does.
- **Brewer v. Otter.ai** (US, Aug 2025) alleges recording without consent. Allegations, contested.

■ The Australian basics

- Notify every caller, every call.
- Transcripts are personal information.
- Limit access, set retention.
- Automated decision disclosure from **10 Dec 2026**. Not legal advice.