

AI CALL NOTES · WORKFLOW 2026

Stop Typing. Start Listening.

Typing during a call costs accuracy, and finishing notes after it costs your queue. How to use AI notes on calls, check them in twenty seconds and keep them lawful.

■ What typing during a call actually costs

- **Split attention.** The facts get heard, the tone and the real reason for the call get missed.
- **Slower calls.** Every "hang on, let me get that down" adds time, and callers repeat themselves.
- **Partial notes.** The address makes it in. The promise to ring back Thursday does not.
- **Work pushed after the call,** while the next caller waits.

■ Wrap-up time is where your queue comes from (illustrative, Erlang C)

Six people, 50 calls in the busy hour, 4 min talk	2.5 min wrap-up	30 sec wrap-up
Time each call occupies a person	6.5 min	4.5 min
How busy the team is	About 90%	About 62%
Callers who wait at all	About 75%	About 23%
Average wait	About 8 min	About 27 sec
Answered within 20 seconds	About 28%	About 81%

Less waiting and better notes are the same goal

Queues do not behave in a straight line. As a team gets busier, waits climb slowly and then very steeply, so a small saving on every call makes a very large difference. **Nobody works harder in the second column.** Two minutes of typing moved from the person to the phone system.

■ During the call: talk for the transcript

Habit	Sounds like
Read numbers back	"So that is 0412 555 019."
Spell names	"Nguyen, N G U Y E N?"
Say promises in full	"I will ring you before 3pm Thursday."
Name who does what	"You send the photos, I book Dave."
Say what you looked up	"Your last service was in March."

■ After the call: the twenty second review

- 1 **Who.** Right customer, name spelled right.
- 2 **Numbers.** Phone, invoice, amounts, dates, times.
- 3 **Promises.** Everything you committed to, nothing you did not.
- 4 **Who does what.** Tasks on the right person.
- 5 **Missing.** One line for anything known but unsaid. Then approve. Fix, do not rewrite.

Watch for invented action items most of all

Models tend to fill a summary with what would normally happen next, so a note may say "**send the customer a brochure**" when nobody mentioned one. A wrong number is annoying. A task nobody agreed to is dangerous, because the next person may act on it.

■ Template: trades

- Customer and site address
- Problem in one line
- Urgency
- Access notes
- Booking or quote date
- Who is attending

■ Template: support

- Account or order number
- Issue in one line
- Steps tried
- Outcome
- Ticket reference
- Promised follow-up

■ Shadow notetakers: why personal apps and bots are out

- No notice to the caller, and data sits in a personal account, often overseas.
- No access control or deletion, and recordings leave when the staff member does.
- US class action **Brewer v. Otter.ai** (filed August 2025) alleges recording without all participants' consent. Allegations only, being defended.

■ How to tell it is working

- **Wrap-up time** falls first and furthest.
- **Busy hour answer time** shows small wrap-up savings as large improvements.
- **Abandoned calls** fall as fewer callers wait.
- **Corrections per summary and missed callbacks** both fall. If speed improves and quality does not, people are approving without reading.

The Australian rule set in one paragraph

Recording law is federal plus state and territory, and it varies, so **notify every caller on every call**. Transcripts are personal information under the Privacy Act: limit access, set retention, mention them in your privacy policy, keep them in Australia. From **10 December 2026** privacy policies must disclose substantially automated decisions. General information, not legal advice.