FREE ONE-PAGE KIT

Test an AI note taker before you pay for one

An AI note taker records a call and writes the notes. Before you pay, ask 12 questions, record a 5-minute practice call, and try it on a few real calls for 7 days.

1. Ask the maker (12 questions)

1. What does it cost each month? What do I lose on the free plan, like minutes or saved history?
2. Which meeting and phone tools does it work with?
3. How does it join a call? Can the other people see it?
4. How are people told they are being recorded?
5. Where are the recordings and notes stored, and who can see them?
6. Does it use my calls to train its AI? Can I say no?
7. Can I delete a recording and its notes for good?
8. How does it do with accents, phone calls and noisy rooms?
9. Can I edit the notes and the to-do list?
10. Can it send to-dos to my email, my task list, or my CRM?
11. Can I export everything if I leave?
12. Is there a contract? How do I cancel?

Know the recording rule. Most states let one person on a call say yes to a recording. A smaller group of states needs everyone on the call to say yes. If your callers live in different states, the Justia survey says to follow the stricter rule. So ask the maker how the tool tells people it is recording, and say it out loud at the start. This is a starting point, not legal advice. Source: Justia: Recording phone calls and conversations, 50-state survey (last reviewed Sept 2024).

2. Record one 5-minute practice call

Get a friend on a call. Say names, numbers, dates and one to-do on purpose, then check the notes.

1. Say 3 full names and 2 phone numbers. Did it spell them right?
2. Say a date and a dollar amount. Are they right in the notes?
3. Give one clear to-do. Did it show up in the to-do list?
4. Both talk at once for 10 seconds. Does it keep the speakers straight?
5. Call from a noisy place. How bad is the text?
6. Delete the recording. Is it really gone from the notes too?

3. Your 7-day trial plan

Day 1	Write down how long you spend on notes after a call each week.
Day 2	Ask the questions. Check the storage and delete settings.
Day 3	Do the 5-minute practice call. Fix what you can.
Day 4	Tell people at the start of each call that you are recording.
Day 5	Use it on 2 or 3 real calls. Read the notes against what you remember.
Day 6	Note every mistake. Check that to-dos went where they should.
Day 7	Compare time spent to Day 1. Keep it, change it, or cancel.

4. Red flags: walk away if you see these

- It records without telling the people on the call.
- You cannot delete a recording.
- They claim the notes are always right.
- It uses your calls to train its AI and you cannot opt out.
- You cannot export your notes.
- They will not say where the recordings are stored.

Tools in our directory for this job

- Otter
- Fathom
- Fireflies
- TurboScribe Call and Meeting Transcripts
- Plaud AI Note Taker
- Zocks

Best lists: Best AI note takers for small business. All free kits: busyworkbots.com/test-kits/

Not sure which tool fits? Take the Free Busywork Audit or book a Free Profit Leak Check (TimeGentic runs BusyWorkBots, so this is our own service). We do not test every tool. Prices change; check each maker's site.