Arohan
Strategies

Meeting Makeover
Your Guide to Choosing the Right AI Notetaker

Why This Guide Matters:

Taking notes during meetings and coaching sessions is tough—especially when you want to stay fully present. If you have ADHD or just struggle to juggle listening deeply and logging details, an AI notetaker can be a game-changer. This guide helps you find the right tool and use it to reclaim your focus, presence, and impact.

Framework Overview:

1. The must-have features for an AI notetaker, especially for neurodivergent brains
2. A simple 4-step framework to choose the right tool for your needs
3. Key criteria to evaluate tools effectively and avoid decision fatigue
4. Practical tips to get started fast and integrate the tool into your workflow

How to use this guide:

➔ **Start with Section 1:** Learn what to look for in an AI notetaker, especially if you're neurodivergent or need tools that support your ability to stay present. This section helps you understand what matters most before diving into options.

➔ **Move to Section 2:** Follow the four-step process to narrow down your options and test tools in real-world situations. Don't rush—take your time with trial runs to see what truly frees you up.

➔ **Review Section 3:** Use the key criteria outlined here to evaluate tools effectively. These practical benchmarks will help you cut through marketing noise and figure out what actually makes a tool useful (or not).

➔ **Follow Section 4:** Once you've chosen your notetaker, jump into this section for step-by-step tips to set it up quickly and start using it with ease. These actions help you integrate it smoothly into your workflow without creating extra stress.

Pro tip: *Keep this guide handy during your tool exploration. Use it as a reference when comparing options, testing features, and making decisions.*

Step 1: What to Look For in an AI Notetaker:

➔ **Accuracy**: Does it reliably capture what's actually said, or does it make guesses and filler mistakes?

➔ **Privacy**: Are proper consent and compliance practices in place? Can participants opt out easily?

➔ **Clarity**: Are the notes immediately useful, or do you have to dig through messy transcripts?

➔ **Integrations**: Does it play nicely with your calendar, CRM, or email tools?

➔ **Collaboration**: Can clients or teammates access what they need without hassle?

➔ **Supportive**: Does it feel like it helps or does it feel like a burden?

Bonus: The best tool will support your thinking style and workflow. It should reduce friction, not create more.

Step 2: Use This 4-Step Framework to Choose the Right Tool:

1. **Define Your Priorities**
- Are you most concerned about privacy, integration with other apps, or how easy it is to use? Clarifying your must-haves helps you narrow your options and avoid overwhelm.

2. **Test the Top Contenders**
- Use your top picks during real meetings or coaching sessions. Notice how accurate the notes are and whether the tool actually frees you up to be more present.

3. **Assess Workflow Fit**
- Check if the notetaker syncs with your existing tools and automates steps like sending transcripts or summaries. The goal is to reduce your workload, not add to it.

4. **Check User Experience**
- Is the interface intuitive? Can your clients or team easily access notes? Does it feel like a helpful partner, not a tech headache?

Bonus: When testing, you might discover unexpected features or integrations that weren't on your initial checklist but end up making your workflow much smoother or your meetings more productive.

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Step 3: Key Criteria to Evaluate Tools Effectively:

1. **Ease of Setup:**
- Can you get started quickly without watching hours of tutorials?
2. **Customization:**
- Can you adjust what's recorded, when, and how summaries are generated?
3. **Transparency:**
- Does the tool make it easy to keep clients and teammates informed?
4. **Cognitive Load:**
- Does it reduce the mental burden of tracking everything—or add to it?
5. **Support for Your Brain:**
- Does it match the way you think? If you're neurodivergent, this might mean avoiding cluttered UIs, having searchable transcripts, or minimizing manual steps.

Bonus: A good workflow fit can mean not just syncing with your existing tools, but also automating tedious tasks like sending follow-up emails, saving you hours each week.

Step 4: Practical Tips to Get Started Fast:

You've picked your tool. Here's how to make it work for you:

1. **Connect Your Calendar**: Enable automatic meeting capture so you never forget to hit "record" or invite the notetaker bot.
2. **Run Test Meetings**: Try it out in low-stakes meetings or solo recordings to explore how transcripts, summaries, and follow-ups work.
3. **Create a Post-Meeting Flow**: Set up your process: What gets sent to clients? When do you review action items? Automate what you can.
4. **Share Notes Transparently:** Let clients or collaborators know how you're using the tool. This builds trust and makes follow-up easier.
5. **Adjust Over Time:** Experiment with settings, formats, or integrations as you figure out what truly saves you time and supports your focus.

Bonus: Choosing a tool with an intuitive interface reduces frustration and increases adoption, which means everyone benefits and you avoid extra training time.

Signs You've Chosen the Right AI Notetaker

➜ You feel more focused and present during meetings.
➜ Follow-ups feel easier with nothing slipping through the cracks.
➜ You trust the notes or summaries without needing to rewatch or relisten.
➜ Your clients or team members are engaging more clearly and proactively.
➜ You're spending less time doing admin and more time in your zone of genius.

Reflection Prompt: When was the last time you felt fully "there" in a meeting? What helped?
Action Step: After your next session, notice how you feel using the AI notetaker. Less stress? More clarity? Take 2 minutes to jot it down.

Signs This isn't the Right Notetaker For You

➜ You're still distracted trying to track everything yourself.
➜ Notes are messy, unreliable, or missing the point.
➜ You avoid using the tool because it feels like more work.
➜ You're not seeing a shift in how supported or clear you feel.
➜ You're dreading meetings instead of feeling more equipped.

Reflection Prompt: What's feeling clunky or frustrating? Is it the tool—or the setup?
Action Step: Pick one feature (like summary settings or integrations) to revisit and refine this week.