



AGENTS OF CHANGE · JULY 2026

# FROM CONVERSATION TO KNOWLEDGE

*How AI turns your calls into strategy.*



**"I SHOULD REMEMBER THAT."**

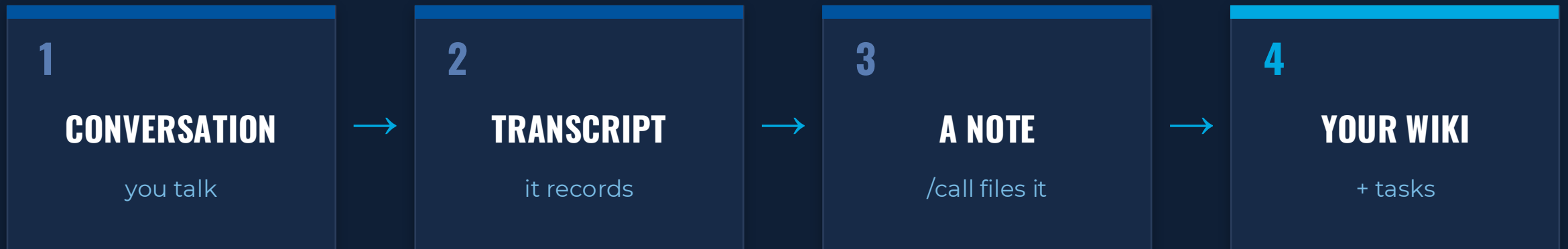


THE SHIFT

**Most of us use AI.  
Few of us work inside of it.**

*That's the whole difference.*

# EVERY CALL BECOMES A FILE.



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*...and it loops back — every file makes the next conversation smarter.*

# 01

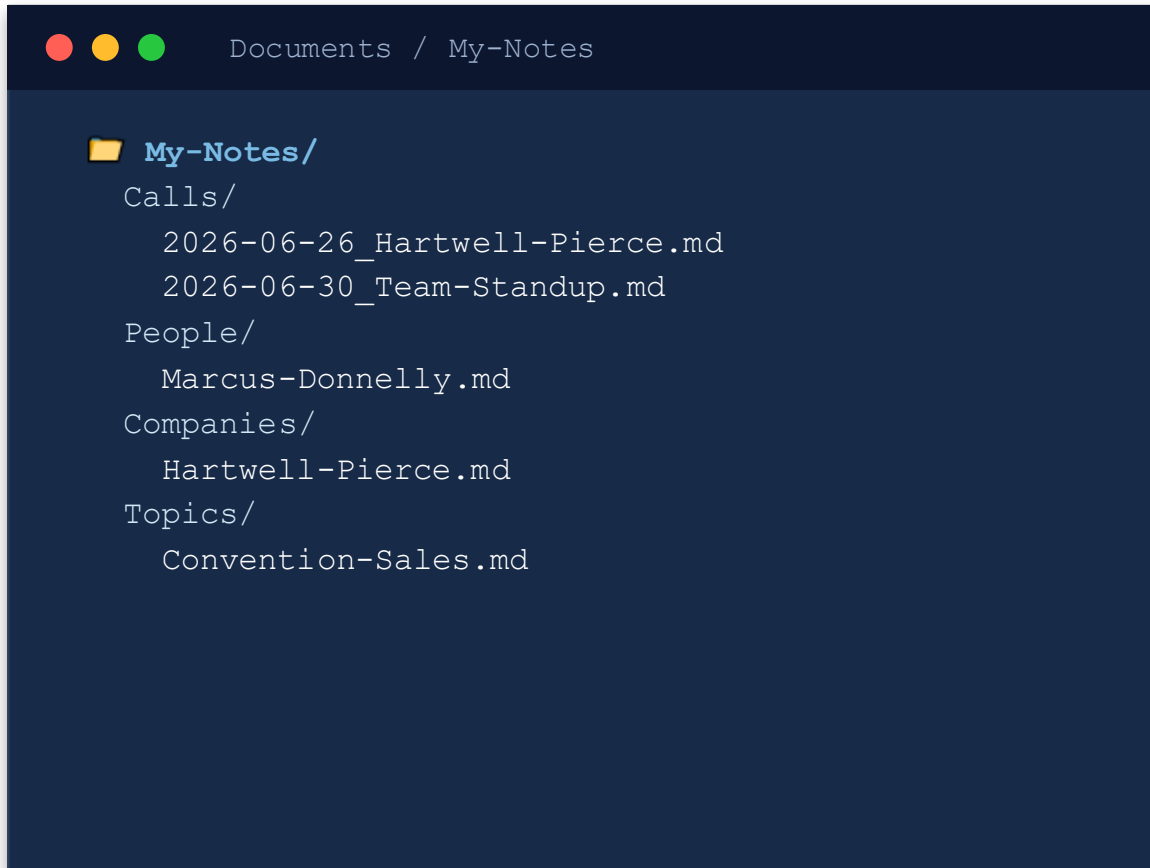
STEP 01

## SET IT UP ONCE

Ten minutes, one time. Then you never think about it again.

THE ONE THING TO SET UP

# One folder. Everything lands here.



Point your AI tool at **one folder** on your computer.

Every call note, every person, every company, every theme — all in one place it can read and write. That single folder becomes your second brain.

# WHICH TOOL ACTUALLY DOES THIS?

Two halves: (1) turn a transcript into a note · (2) read across ALL your notes

## CLAUDE COWORK

BOTH HALVES — your on-ramp

Reads and writes across every note on its own. Capture, file, retrieve, compound — the real thing.

✓ makes the note ✓ reads them all back

## GEMINI

BEST NON-CLAUDE FOR RETRIEVAL

A “Gem” holds your note format; Gemini reads across your whole Google Drive folder.

✓ makes the note ~ you save the Doc yourself

## CHATGPT

GREAT AT HALF ONE

A Project + Custom GPT turns a transcript into the note. Retrieval only across files you re-upload.

✓ makes the note ✗ you're the file clerk

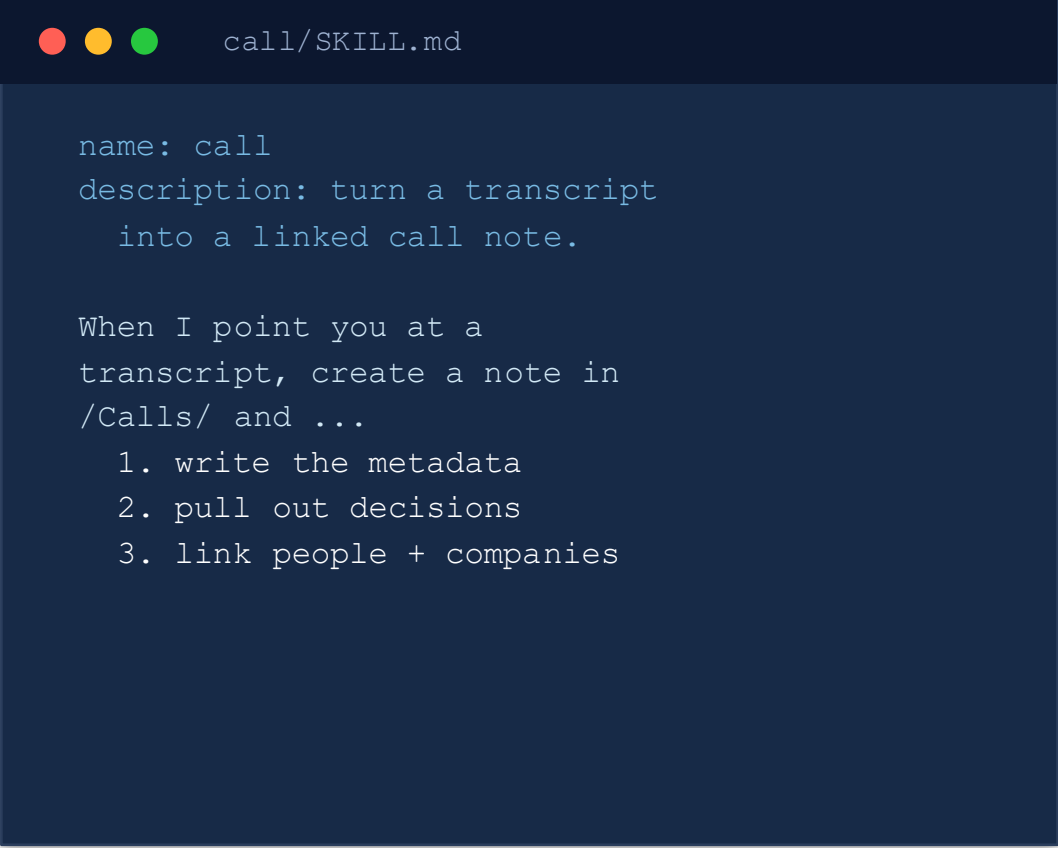


THE ONE NEW WORD

# A “skill” is a saved prompt you build once.

You write the instructions for a task **one time**. Save it. Now it's a command you can run on any call, forever.

*No coding. It's a plain text file of directions — written in English.*



```
name: call
description: turn a transcript
              into a linked call note.

When I point you at a
transcript, create a note in
/Calls/ and ...
  1. write the metadata
  2. pull out decisions
  3. link people + companies
```



# BUILD IT ONCE — TWO WAYS.

## EASIEST — IN COWORK

**1** Ask it: “build me a skill that turns a call transcript into a linked note” (paste the file).

**2**

It hands you a skill — click **“Save skill.”**

**3**

Type `/call` — it's live.

## IF THAT ERRORS — DROP THE FILE

**1** Make a folder: `~/.claude/skills/call/`

**2**

Paste the file, save it as **SKILL.md**

**3**

Type `/call` — same result, no build step to fail.

# Build it in Cowork, or drop it in ~/.claude/skills/call/SKILL.md

call / SKILL.md

---

**name:** call

**description:** Turn a meeting transcript into a structured note, and keep my People, Companies, and Tasks up to date.

---

When I point you at a transcript, do ALL of this. Work only from the verbatim transcript — never the summary; it drops the decisions that matter.

**# 1 · The call note → Calls/YYYY-MM-DD\_<name>.md**

Frontmatter: type, date, people, companies, topics

## Context            who / why / what (2-3 lines)

## Decisions        what actually got decided

## Action Items    each one with an owner

# Build it in Cowork, or drop it in ~/.claude/skills/call/SKILL.md

call / SKILL.md

## # 2 · People → People/<Full-Name>.md

For every person on the call, create their file  
if it's missing (their role + company).

Append one dated line under  
## Relationship History that links this call.

## # 3 · Companies → Companies/<Org>.md

For every org with someone on the call, create  
the file if missing (what they do + key people).

Add a row to ## Engagement Timeline:  
date → what happened → [[this call]]

# Build it in Cowork, or drop it in ~/.claude/skills/call/SKILL.md

call / SKILL.md

## # 4 · Tasks

Turn every action item into a task with an owner, and a due date if one was mentioned.

When I ask "what's on my list," gather the open ones across all my notes.

## # 5 · Link it all

Connect the note, people, companies, and topics with [[wikilinks]]. If a linked file doesn't exist, create it.

When you're done, tell me what you filed, what you created, and anything waiting on a decision from me.

# 02

STEP 02

## **CAPTURE EVERYTHING**

If it was said out loud, it should end up as text you own.

IN-PERSON CALLS

## Wear it. It records.



### A WEARABLE AI RECORDER

Clip it on. It captures the conversation and turns it into a transcript automatically.

The recorder I use is **Plaud** — a small clip or card that syncs to an app.

Any recorder works. The goal: you want it to give you back the words, not just a summary.

THE ONE MANUAL STEP

**Plaud → your folder. By hand — and that's fine.**

**1**

## **Record**

the meeting on the device



**2**

## **Download**

the transcript file from the app



**3**

## **Drop it**

into your Calls/ folder

*Plaud has no automatic connector yet — so you move the file yourself. Ten seconds. You can automate it later; you don't need to today.*

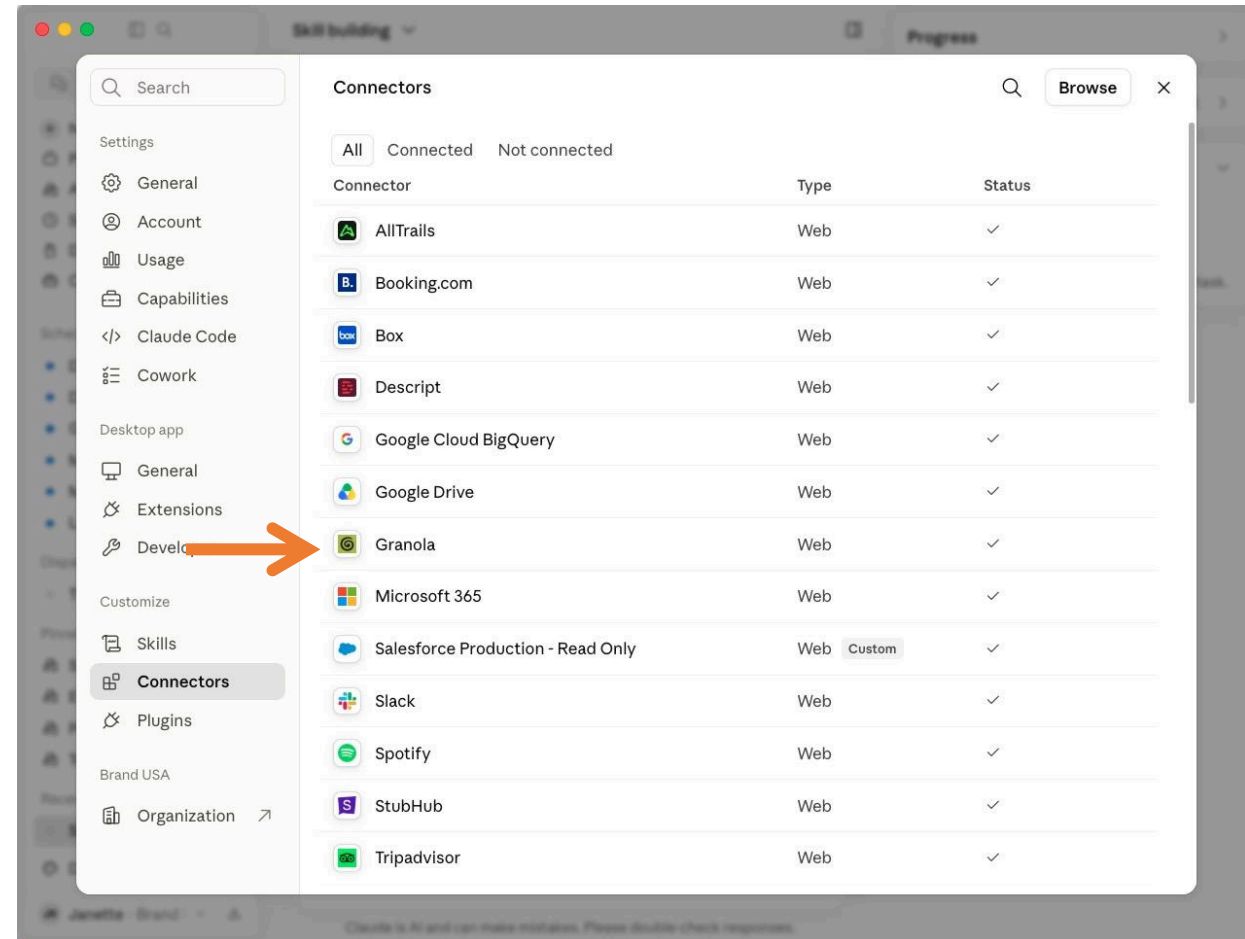


## VIRTUAL CALLS

# Granola catches the ones on your screen.

For Zoom, Teams, Meet — **Granola** listens in the background and keeps the full transcript.

Then you just ask your AI tool to pull that transcript in — the same folder, the same pipeline.



# TWO RULES FOR CAPTURE.

## **Always say you're recording.**

Get it out of the shadows. "I record my meetings so nothing gets lost — okay with you?"  
Almost everyone says yes.

## **The transcript is the source of truth.**

Work from the actual words. The auto-summary quietly drops the decisions that matter most.

# 03

STEP 03

## RUN IT

One command does the filing. You watch.

## THE WHOLE POINT

# Watch it file itself.

```
SalesCallTranscript

Alicia: So we're looking at
        about 420 attendees...
Marcus: Three nights, and
        we need a walkable block.
Nina: Send the request list
      today – proposal in five
      business days.
...

```



/call



```
2026-06-26_Hartwell-Pierce.md

type: call
people: [[Marcus-Donnelly]]
companies: [[Hartwell-Pierce]]
topics: [[Convention-Sales]]

## Decisions
Walkable district block; two-
option proposal in 5 days.
## Action Items
□ Send request list today

```

WHAT YOU GET BACK

# A note with structure built in.

2026-06-26\_Hartwell-Pierce.md

```
type: call    date: 2026-06-26
people: [[Marcus-Donnelly]] ...
```

## ## Context

420-attendee leadership conf,  
3 nights, mid-November.

## ## Decisions

District room block; two-option  
proposal + decision matrix.

## ## Action Items

☐ Request list today — Alicia

### METADATA

Who, when, and every link — filled in for you.

### CONTEXT

The situation in two lines, so future-you remembers fast.

### DECISIONS

What actually got decided — the part summaries drop.

### ACTION ITEMS

Every follow-up, with an owner.

# EVERY NOTE LINKS THREE WAYS.



frontmatter

## people:

[[Marcus-Donnelly]]

[[Nina-Alvarez]]

## companies:

[[Hartwell-Pierce]]

## topics:

[[Convention-Sales]]

## PEOPLE

Every person gets a profile that remembers your history together.

## COMPANIES

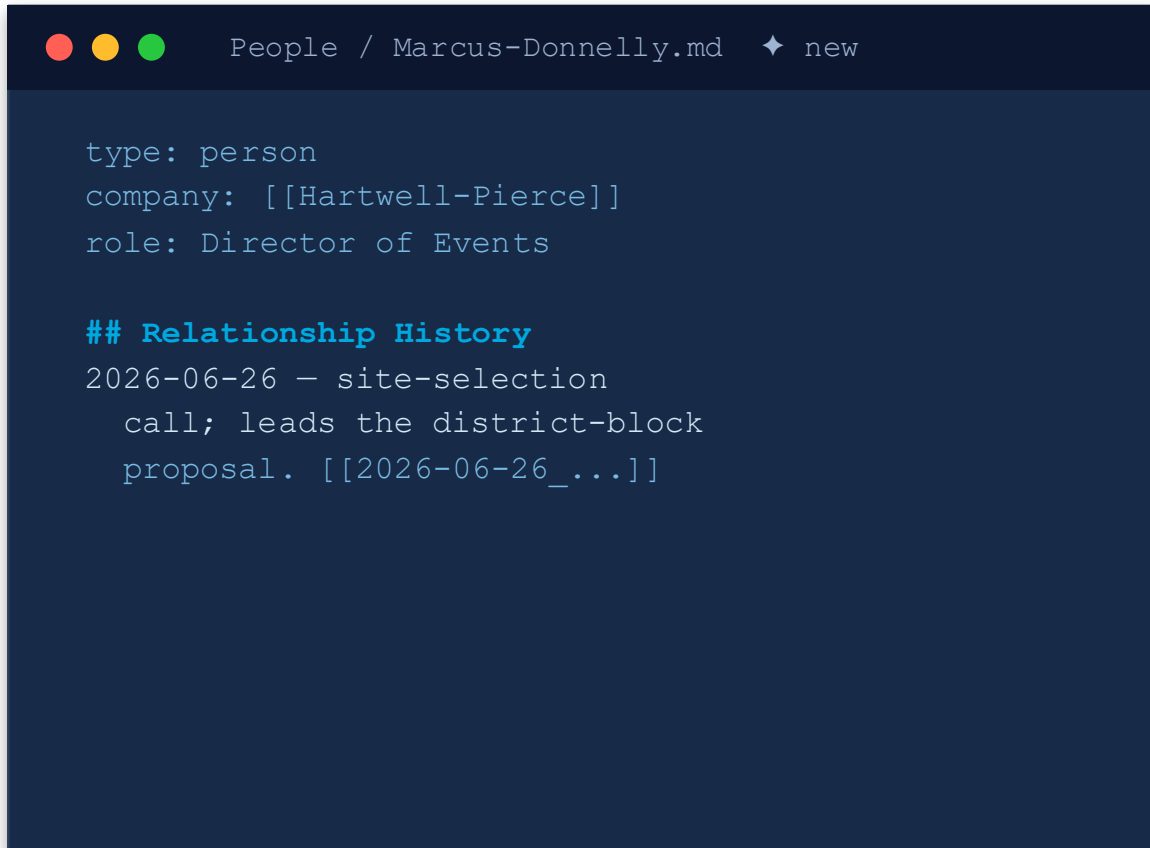
Every org gets a page — products, contacts, timeline.

## TOPICS

Every theme gets a hub that gathers every call about it.

NO FILE YET?

# It creates the file, then wires it up.

A screenshot of a code editor window with a dark blue background. The title bar at the top shows three colored window control buttons (red, yellow, green) on the left, followed by the text 'People / Marcus-Donnelly.md' and a star icon with the word 'new' on the right. The main area of the editor contains the following text:

```
type: person
company: [[Hartwell-Pierce]]
role: Director of Events

## Relationship History
2026-06-26 — site-selection
  call; leads the district-block
  proposal. [[2026-06-26_...]]
```

Mention someone new and the note **creates their file** — then links back to the call automatically.

*One habit worth keeping: after it files, glance that the links landed. Thirty seconds of trust-building.*

# 04

STEP 04

## GET IT BACK

Everything you ever filed — on demand, in plain language.





WHY IT'S WORTH IT

# The file becomes your external brain.

*Every phone call creates a file about the person you talked to.*

THE PAYOFF, FILE BY FILE

# Every person carries their whole history.

People / Marcus-Donnelly.md

```
role: Director of Events  
company: [[Hartwell-Pierce]]
```

## ## Relationship History

```
2026-06-26 — site selection;  
    leads the district proposal.  
2026-05-02 — intro at ESTO;  
    asked about walkable venues.
```

Open anyone's file and it's all there:  
every call, every decision, every promise.

Companies get a full page. Topics  
gather every call about a theme. **You  
never start a relationship from zero  
again.**

ASK IN PLAIN ENGLISH

# “Prep me for my next call with Marcus.”

It reads every file that touches Marcus and hands back:

- Where you left off — the district-block proposal
- What's owed — request list due, soft hold on Foundry Market
- Who else was in the room — Nina, Trevor
- The one open question — DMC vs. transport vendor

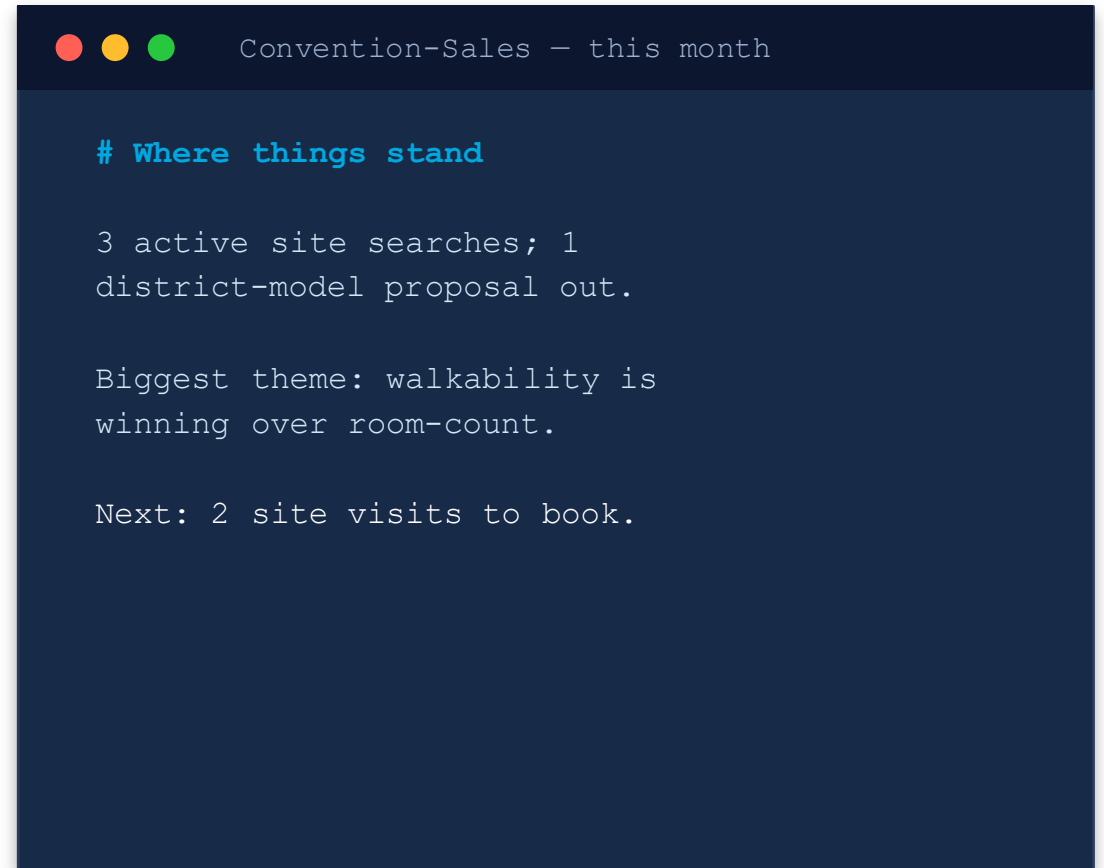
**No re-reading old notes.** You walk in already caught up — because the files did the remembering.

ONE MORE ASK

# Turn a month of calls into a report.

**“Summarize every convention-sales call this quarter for my director.”**

It reads across all the notes and writes the summary. The reporting you dreaded is now a sentence.



AND THE FOLLOW-UP

## Draft the email — in your voice.

It already knows what was decided and how you write. **You edit and send — you stay the author.**

To: Marcus Donnelly

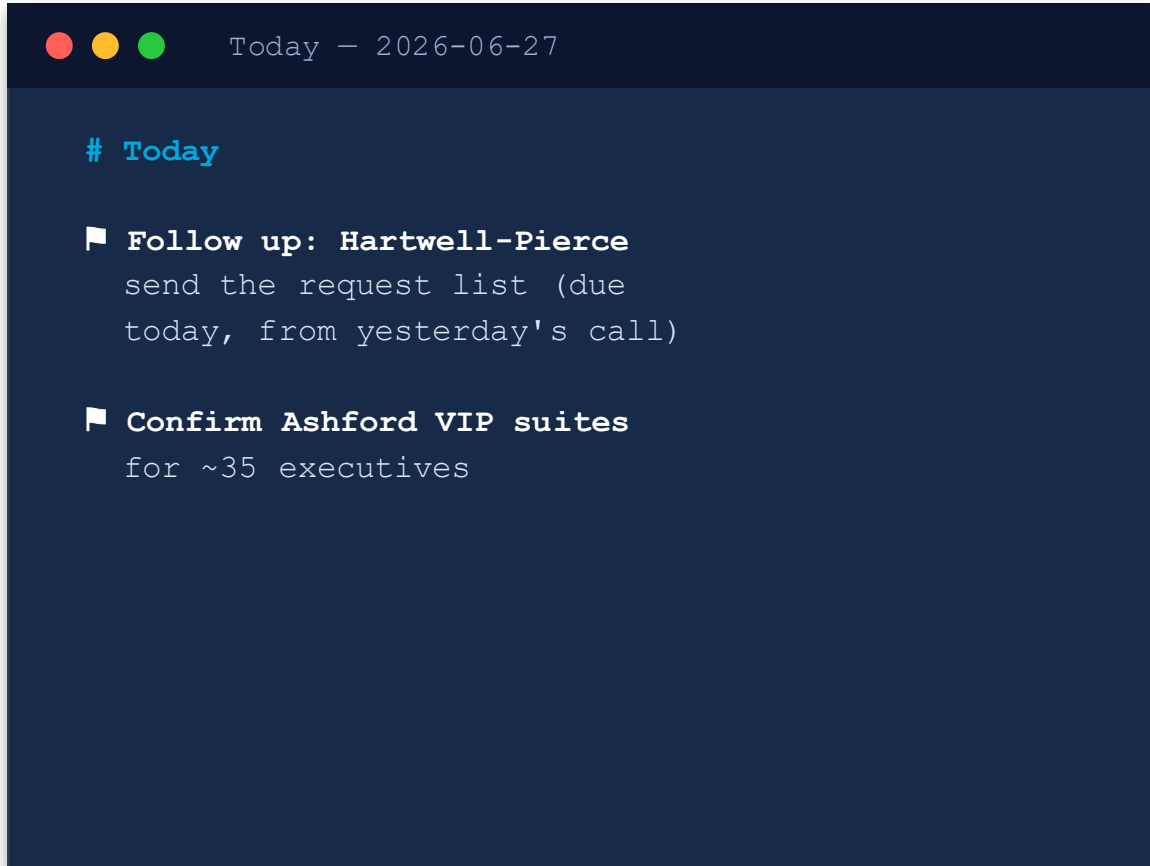
Marcus — great talking through the district model today.

Sending the full request list this afternoon; you'll have the two-option proposal within five business days. I'll flag the Foundry Market reception as a soft hold once you advance.

Talk soon,  
Alicia

THE NEXT MORNING

# Tomorrow, it reminds you.



The action items you captured don't sit in a note you forget. **They surface on tomorrow's list — automatically.**

SO HERE'S THE REAL PAYOFF

# Get value from every trip you pay for.

*You already send people to conferences. The intel walks out the door with them.  
This is how it comes home.*

# ONE PERSON WENT. THE TEAM GOT THE INTEL.

Record the AI sessions at a conference. Process the notes. Then ask for a shareable brief — and the whole team gets what you learned, **without going**.

## Real example:

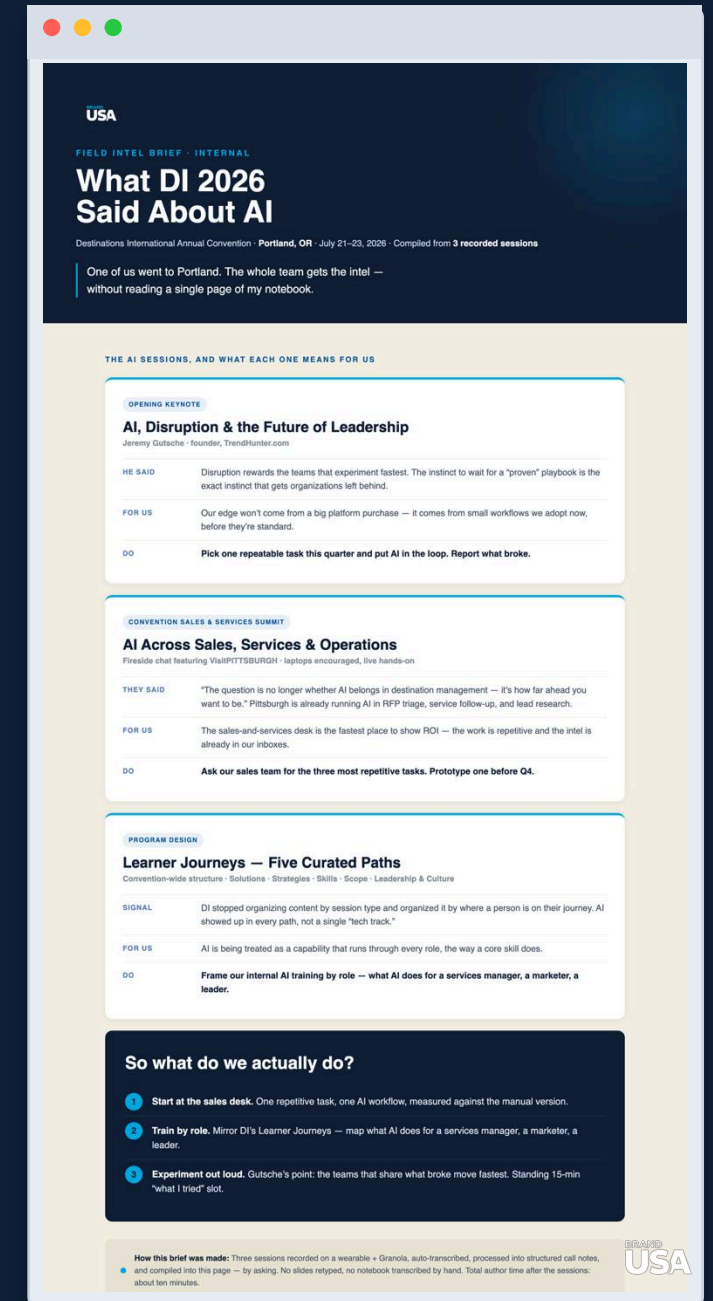
Destinations International 2026, Portland

## Built from:

3 recorded AI sessions — the Gutsche keynote, the VisitPittsburgh fireside, the Learner Journeys

## Author time after the sessions:

about ten minutes





# 05

STEP 05

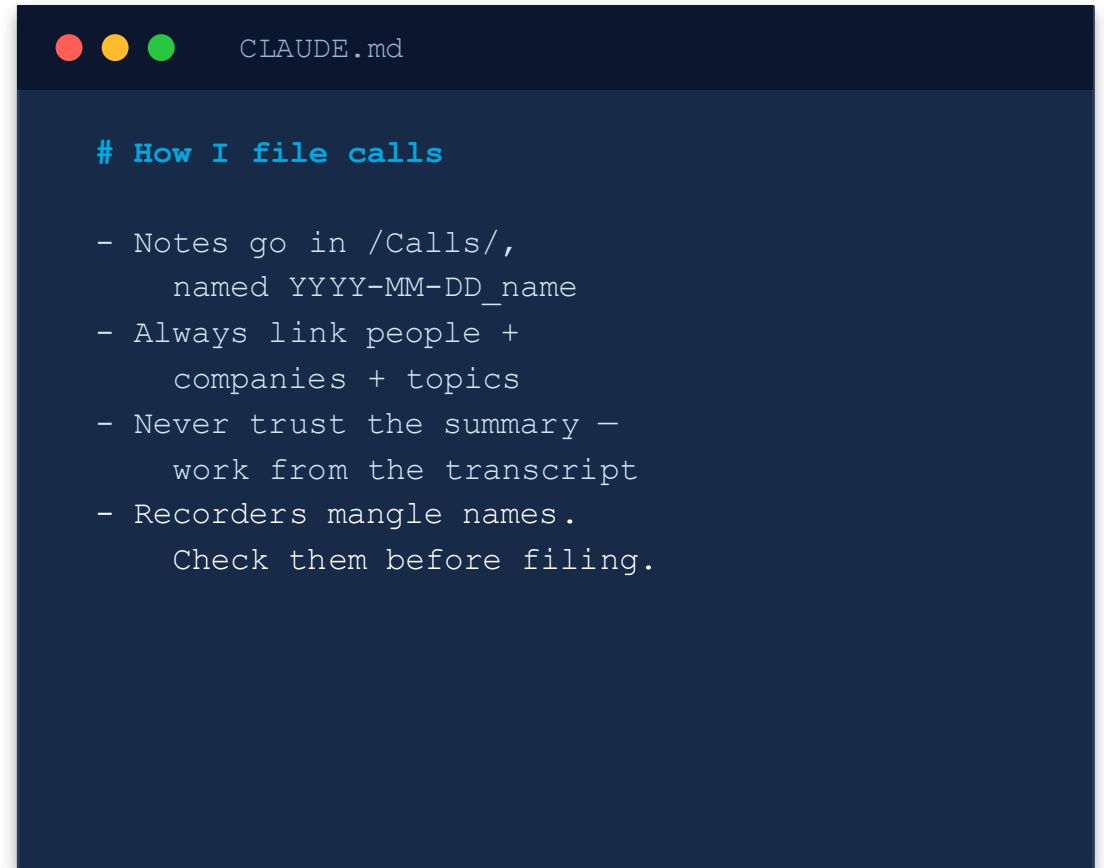
## MAKE IT YOURS

Teach it your rules once. It follows them every time.

YOUR STANDARDS, WRITTEN DOWN

# One file sets the rules.

One plain-English file holds your preferences. **Every note follows them** — the format, the folders, the cautions — without you repeating yourself.



```
# How I file calls

- Notes go in /Calls/,
  named YYYY-MM-DD_name
- Always link people +
  companies + topics
- Never trust the summary -
  work from the transcript
- Recorders mangle names.
  Check them before filing.
```

# TELL IT WHEN IT'S WRONG.

*It updates itself, so it never makes that mistake again.*

**YOU**

That name is wrong — it's Marcus Donnelly, not Marcus Donley.

**IT**

Fixed. I've also added a note to always double-check names against your People files before filing.

**YOU**

Save that as a rule.

**IT**

Done — added to your CLAUDE.md. It'll apply to every call from now on.



IT EVEN COACHES YOU

**“I leak the most value  
after the call.”**

*Real feedback Claude gave me a couple months ago.*

# START THIS WEEK.

**01**

## **One paid tool**

Pick one. Make it the paid version. Give it a real folder.

**02**

## **One recorder**

A wearable, or Granola for your virtual calls.

**03**

## **Your next call**

Record it. Run /call. Watch it file. That's the whole loop.



AND ONE LAST THING

**WHAT'S YOUR FIRST WORKFLOW?**