



AGENTS OF CHANGE · JULY 2026

FROM CONVERSATION TO KNOWLEDGE

How AI turns your calls into strategy.



"I SHOULD REMEMBER THAT."

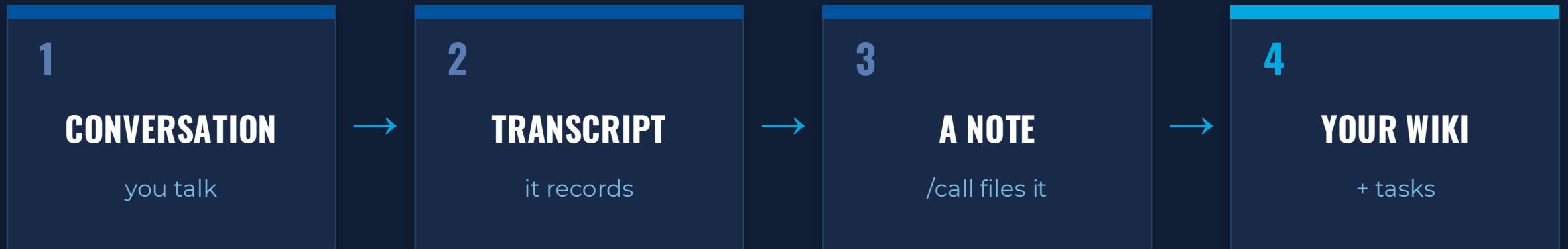


THE SHIFT

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

That's the whole difference.

EVERY CALL BECOMES A FILE.



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

01

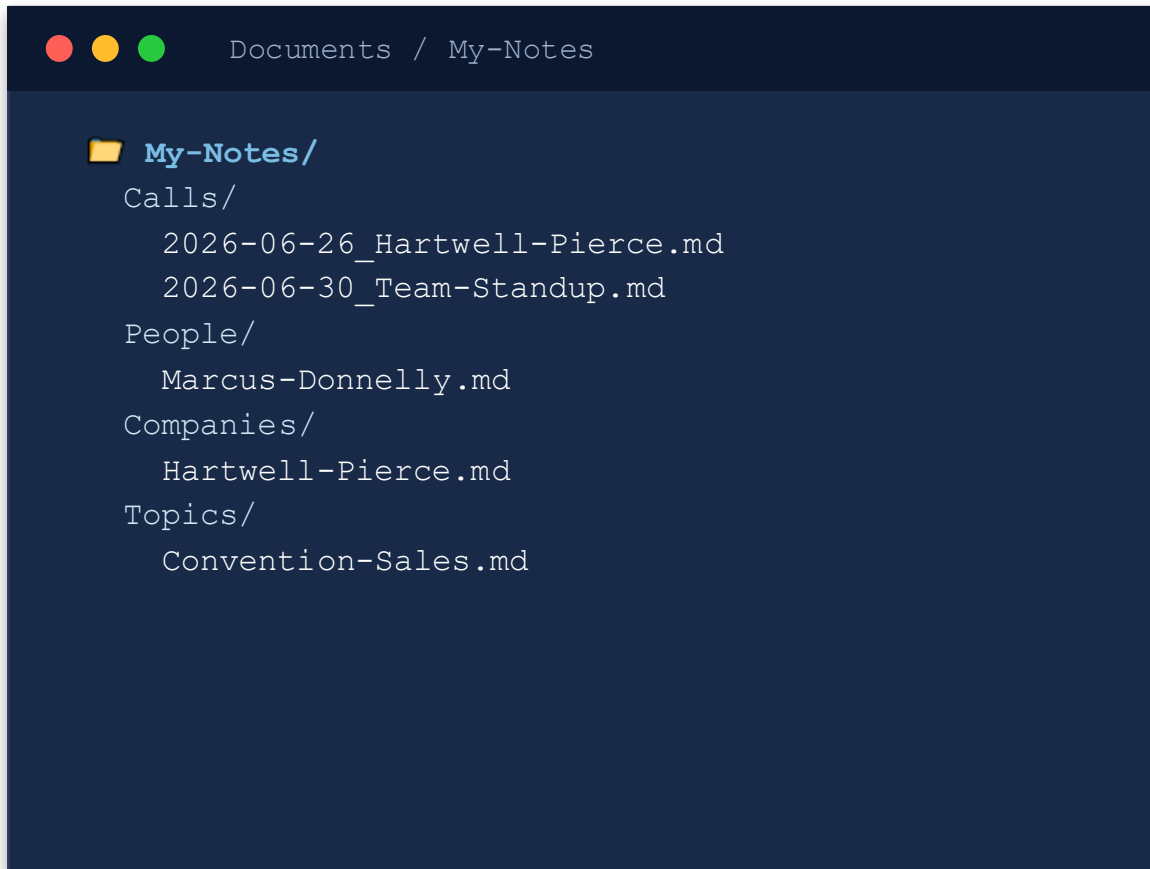
STEP 01

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.

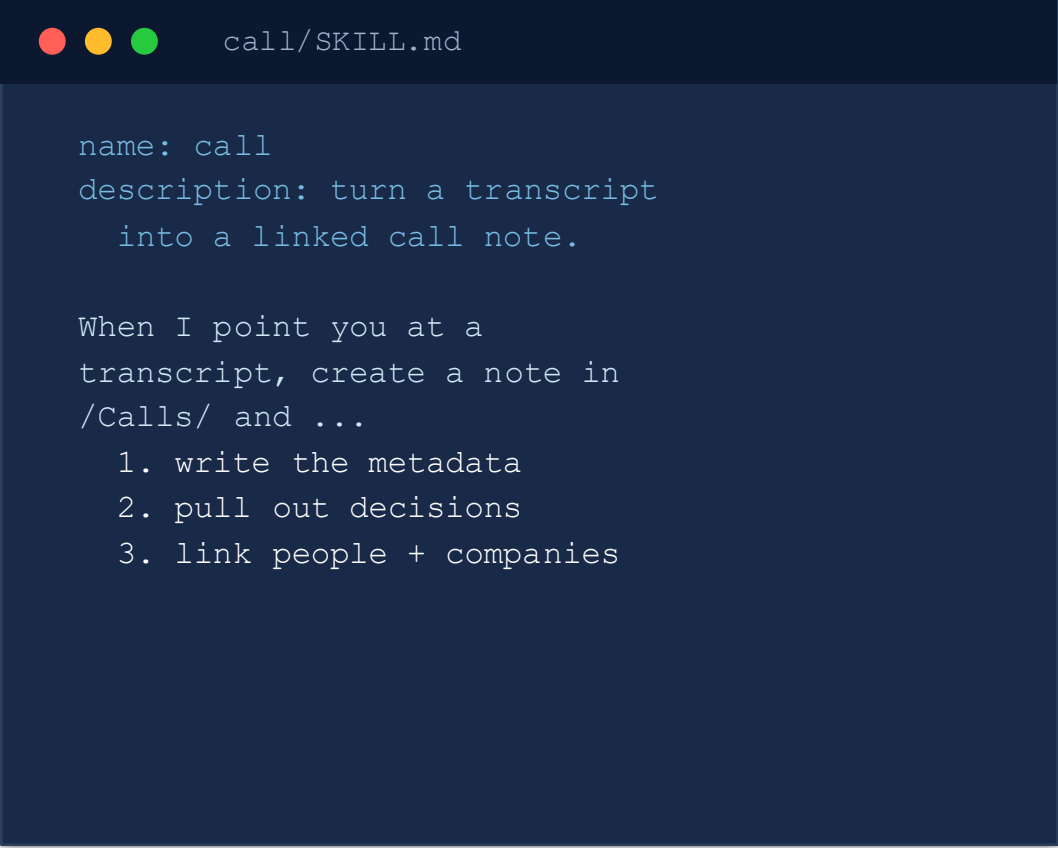
✓ makes the note ✗ you're the file clerk

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

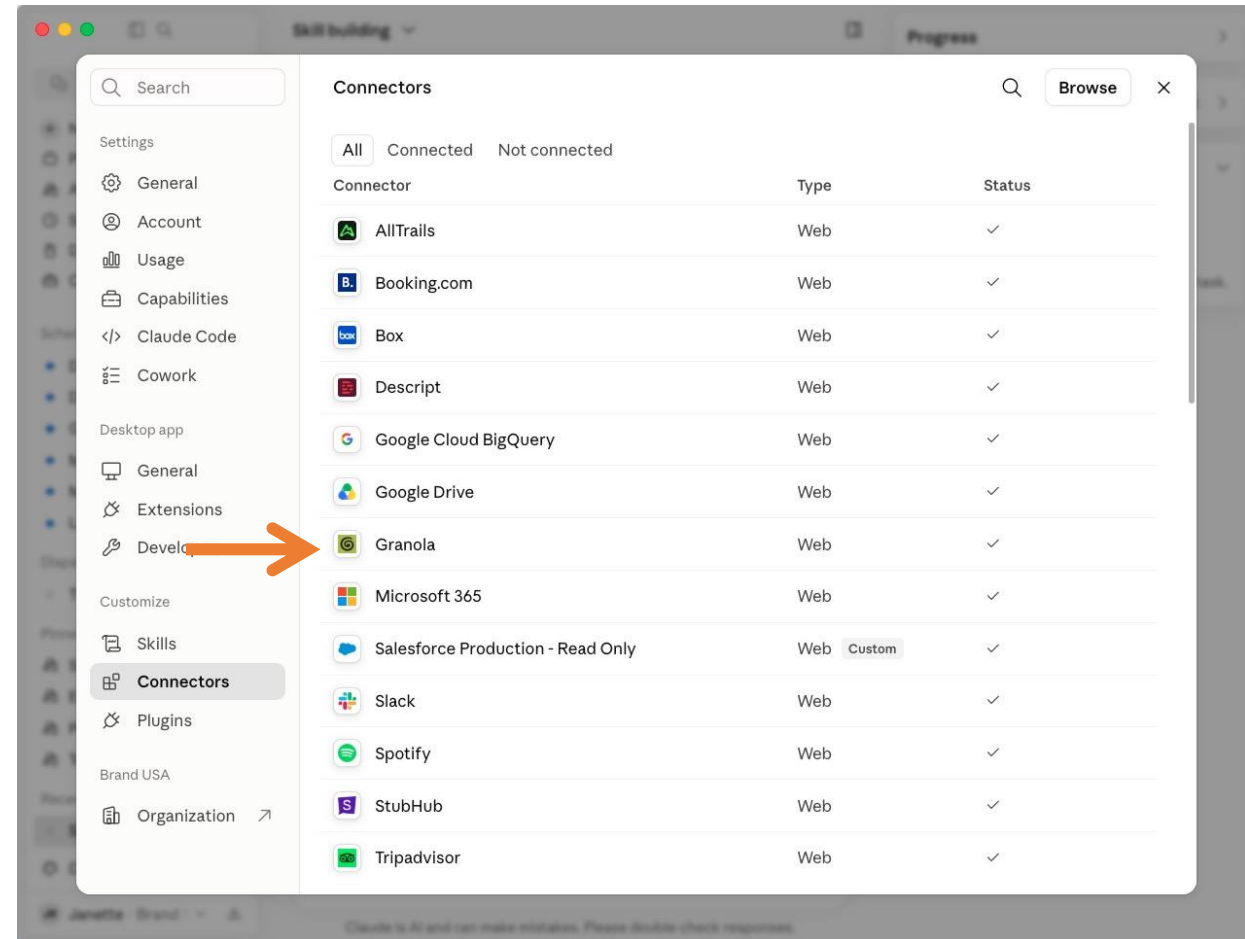
Plaud has no automatic connector yet — so you move the file yourself. Ten seconds. You can automate it later; you don't need to today.

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

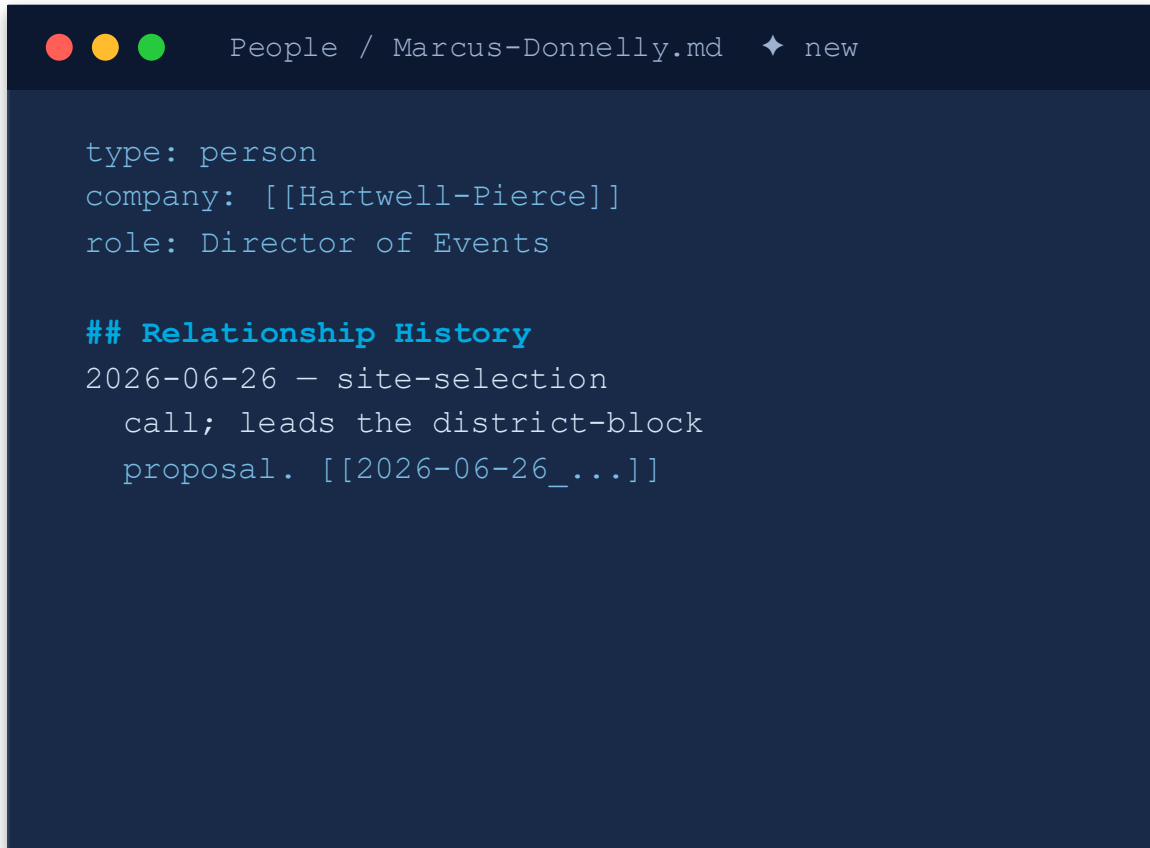
Every org gets a page — products, contacts, timeline.

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

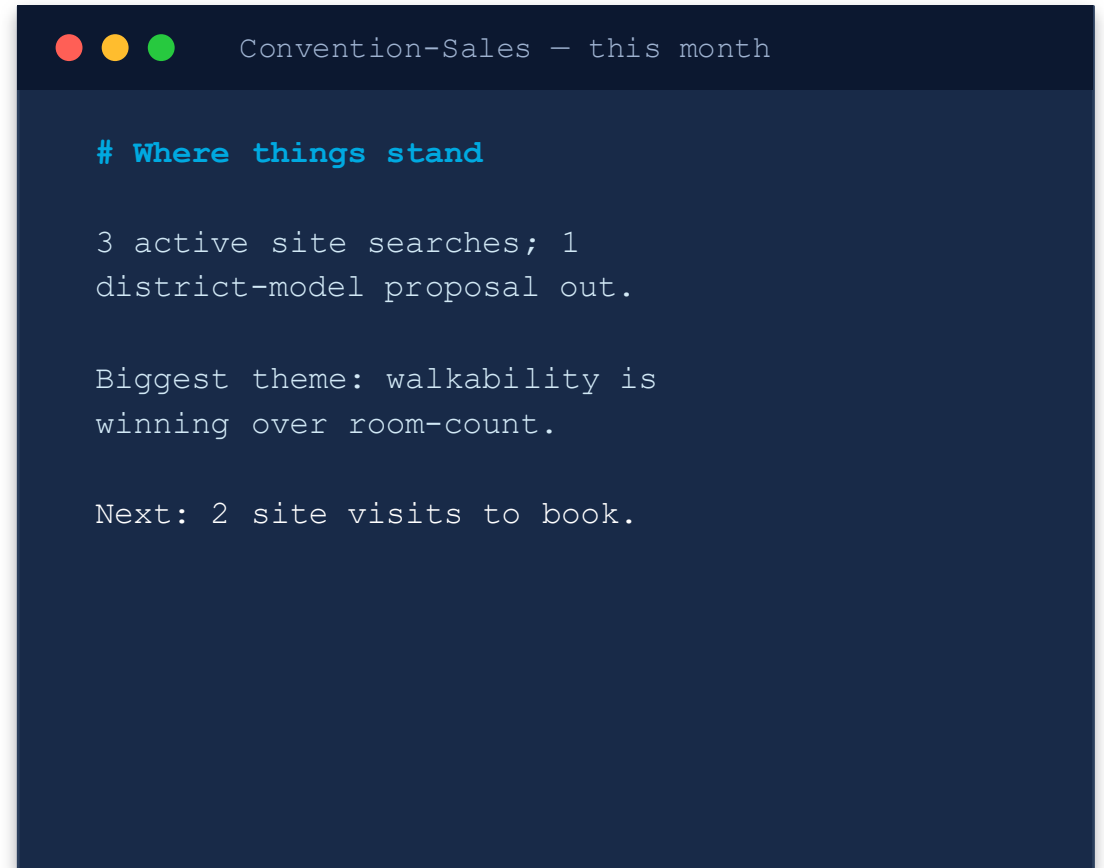
No re-reading old notes. You walk in already caught up — because the files did the remembering.

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

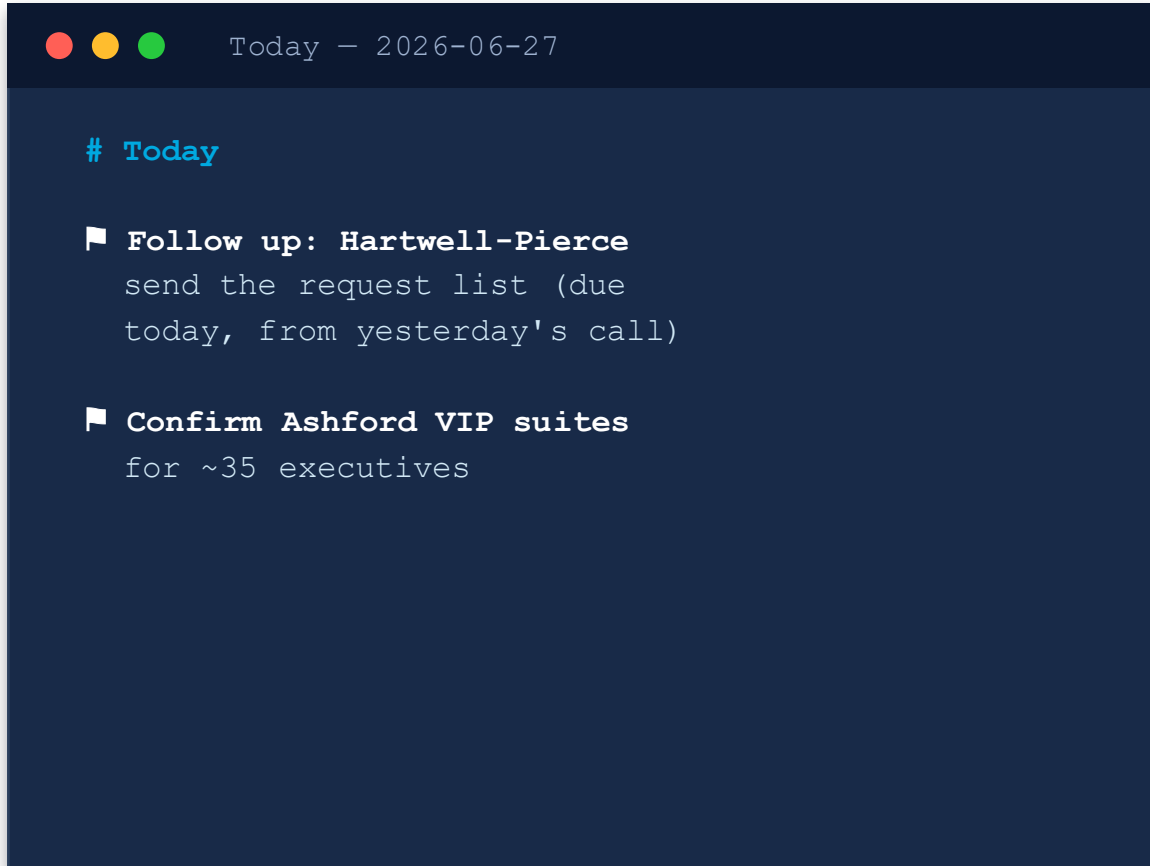
Marcus — great talking through the district model today.

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:

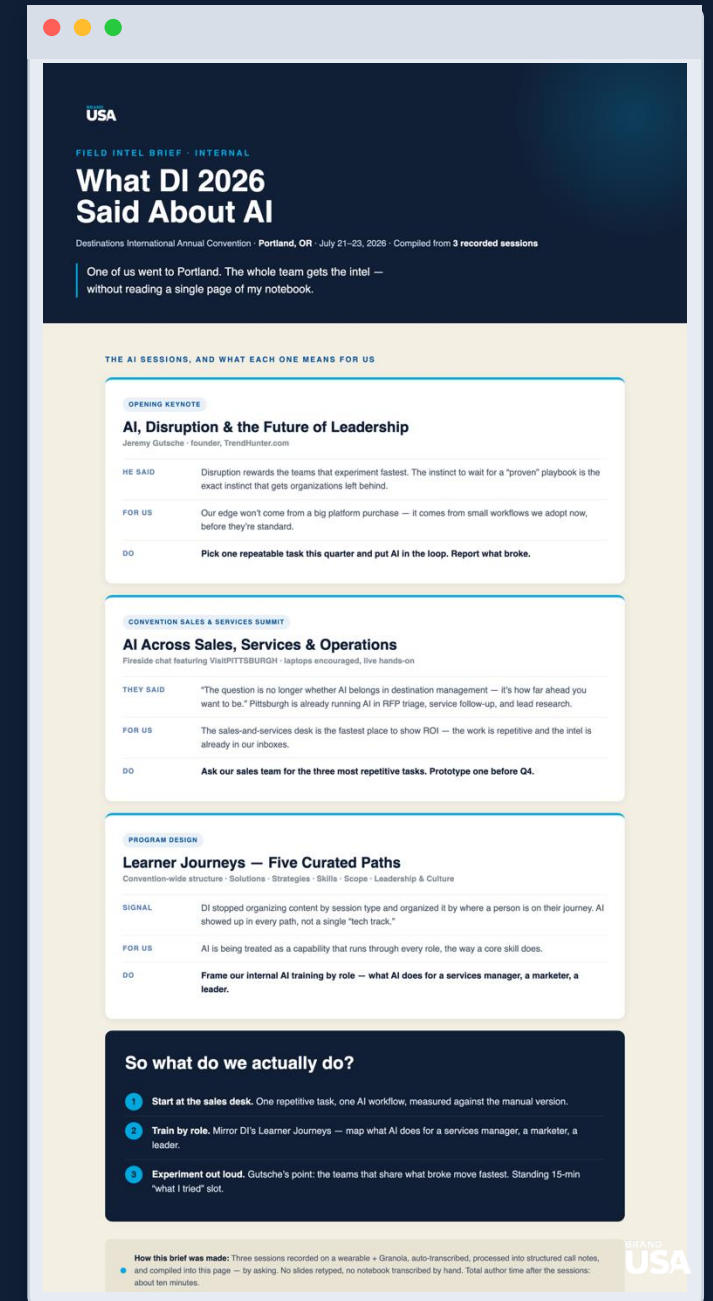
Destinations International 2026, Portland

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

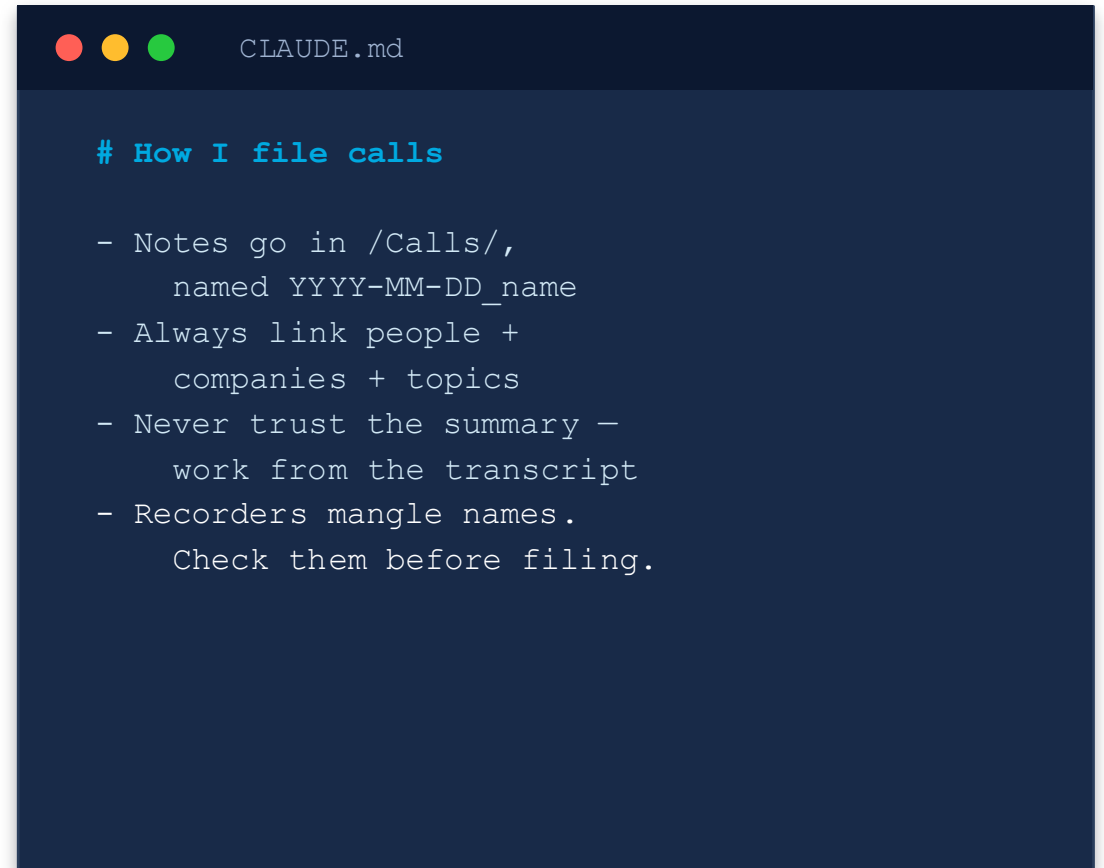
MAKE IT YOURS

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.



```
CLAUDE.md

# 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?