

Ai Note Taker

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User Problems
Possible Solutions

Product Discovery Journey Map

Project Structure:

1. Should we enter the Ai note taker market? Yes / No and why
2. Note taking JTBDs in general
3. Which customer segment should we enter into?
 - a. Look at each of the customer segments -
 - i. understand the needs and behavior characteristics and if there are any particular JTBD
 - ii. Which segment is worth penetrating? Look at the user behavior and back it by market research
 - iii. Select the most profitable segment based on market size
4. Is there any further subdivision for the selected customer segment
 - a. Study those
5. Customer journey mapping
 - a. Job Steps + Relevant needs of that step + Job Variables for that step <https://hellopom.co/jobs-to-be-done-for-product-managers/>
6. User Personas
7. Identify the problems → categorize the problems and prioritize
8. Solutions → brainstorm solutions and prioritize

Introduction

An AI notetaker is an artificial intelligence-powered tool designed to assist individuals in capturing, organizing, and processing the information within their notes.

It either uses natural language processing to convert spoken language into text, generating a conversation record, or leverages AI algorithms to understand the context and provide suggestions.

Such a tool is beneficial for professionals who juggle multiple meetings, students attending online lectures, or even conference attendees who need a reliable transcription of discussions. In fact, anyone needing a dependable record of detailed discussions can benefit from an AI note-taker.

Market Research

How big is the market for note taker? What is the potential of this market?

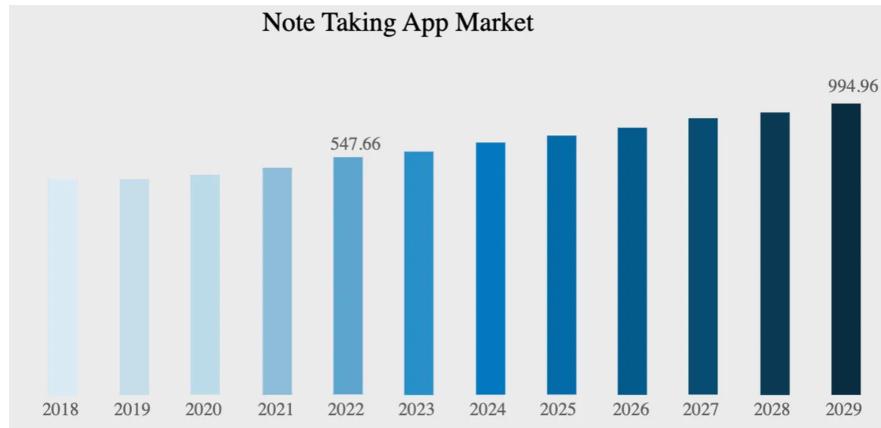
Goal: To understand the potential of this market

Market Size

According to **Global Growth Insights**, the Note Taking App Market is projected to grow from USD 547.66 million in 2022 to USD 994.96 million by 2031, at a CAGR of 22.02%, driven by digital transformation, remote work trends, and technological advancements such as AI integration and cross-platform compatibility.

The Note Taking App Market presents several lucrative opportunities for growth and innovation, particularly in the education sector, where there is a growing demand for digital tools to enhance learning. Corporate collaboration tools are also in high demand as businesses continue to adopt remote and hybrid work models. The integration of AI and ML technologies offers the potential to create more intelligent and differentiated note-taking apps, providing features like automatic categorization and content recommendations. Additionally, there is an opportunity for specialized

note-taking apps tailored to specific industries, which can cater to unique needs and preferences. Expansion into new markets and the development of niche products represent further opportunities for market players to capitalize on.



Regional Analysis of the Ai Note Taker

In terms of **region**, the global note taking app market is classified as Asia Pacific, North America, Latin America, Europe, and Middle East & Africa. In 2023, North America led the regional market, mainly due to the influence of the United States. The penchant for digital enhancement and technological ubiquity in the United States, combined with the existence of numerous multinational tech corporations, has significantly driven the uptake of Note Taking Apps.

- According to a published report, the United States has one of the highest smartphone penetration rates in the world at approximately **81.5%**, indicating massive potential users for such apps.

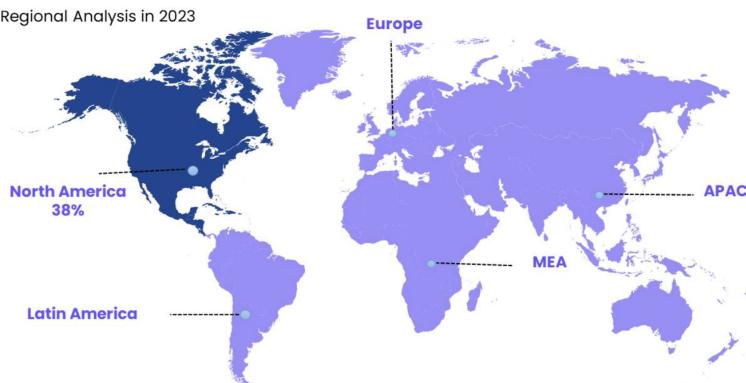
In 2023, **North America** dominated the AI Note Taking Market with a **38%** share, driven by high demand for productivity tools that enhance efficiency in both educational and corporate settings. The region's robust tech infrastructure, combined with a culture that emphasizes innovation and productivity, has made AI-powered note-taking solutions increasingly popular. The U.S., in particular, is leading the market, with widespread use in universities, corporations, and professional services.

The market in Asia Pacific is anticipated to grow at a rapid pace during the forecast period. Countries such as China, India, and Japan are at the heart of this anticipated growth. These nations are currently witnessing a digital revolution with increasing Internet access, rising **smartphone** users, and government initiatives further boosting the regional market. The expansion of digital capabilities and access in these countries provides an ideal environment for the growth of this sector.

Europe is also a significant market, with growing adoption in the education and business sectors, particularly in the U.K. and Germany. Latin America and the Middle East & Africa are gradually catching up, with increased awareness of the benefits of AI in enhancing productivity and streamlining workflows.

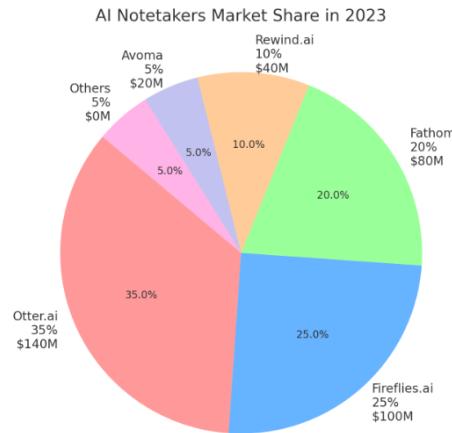
AI Note Taking Market

Regional Analysis in 2023



Understanding Existing Players in the Market

Goal: To understand the existing competition and gain insight on their value proposition



Product Name & Link	Companies Using Them (according to the product website)	User Base	Market Share	User Personas	Number of Active Users	Revenue	Pricing Plan
Otter.ai	Over 50,000 companies (e.g., Zoom, IBM, Dropbox)	~10 million	35%	Professionals, Students, Journalists	~4 million	\$140 million	Free, Pro (\$8.33/month), Business (\$20/month)
Fireflies.ai	20,000+ companies (e.g., Nike, Netflix, Uber)	~6 million	25%	Sales teams, Recruiters, Marketers	~2.5 million	\$100 million	Free, Pro (\$10/month), Business (\$19/month)
Fathom	10,000+ companies (e.g., Google, Microsoft)	~4 million	20%	Remote workers, Teams, Analysts	~2 million	\$80 million	Free, Premium (\$12/month)
Rewind.ai	5,000+ companies (e.g., Shopify, Airbnb)	~2 million	10%	Entrepreneurs, Startups, Researchers	~1 million	\$40 million	Free, Pro (\$7/month), Enterprise (Custom)
Avoma	8,000+ companies (e.g., Salesforce, HubSpot)	~1.5 million	5%	Sales teams, Customer Success, Consultants	~700,000	\$20 million	Free, Starter (\$15/month), Growth (\$40/month)

Summary:

1. Otter.ai and Fireflies.ai is leading the market share in AI notetakers with ~10Million and ~6million users respectively.
2. Revenue: \$140 Million and \$100million each
3. All the AI notetakers found online are concentrating on tech companies
4. The top companies already have approximately 25 million active users all together
5. The market potential is therefore verified and looks promising

What do users think/feel about the existing Ai Note Takers?

Goal: To understand what the user's value and if there are any pain points with the current Ai Note Takers

 [deleted] · 6mo ago

"Research is addictive, because it rewards us with the false impression of making progress. Finding something interesting isn't the same as knowing something and being able to work with it. I call this the Collector's Fallacy."

- [[Christian Tietze]]

AI can help you find the information you need. But your brain needs to ultimately process it by writing it down as a note in your own words. That is what leads to understanding.

↑ 23 ↓ Reply Award Share ...

(+) 1 more reply

 thrustyluststation · 6mo ago

Writing is thinking. Write your notes so you know what you think about them. You're only shortcircuiting yourself when you use AI

↑ 41 ↓ Reply Award Share ...

 leshiy19xx · 6mo ago

Yes. At time I also think about possible related notes I can link. This thinking is often more important than the created links.

↑ 10 ↓ Reply Award Share ...

(+) 1 more reply

 Sandertp · 6mo ago

I personally wouldn't use AI to generate content in my notes, but maybe to query and analyze it (my machine is too low on ram to have a local LLM atm).

From a worldbuilding and creative writing point of view, it might inspire some new additions, but not directly create them

↑ 17 ↓ Reply Award Share ...

After trying many note-taking apps, I decided to stick with Obsidian frankly because of the level of configurability and efficiency it offers. I use it for nearly everything -- capturing lecture notes, schedules, journals, and sometimes even for coding (thanks to the plugins it offers that allow me to run the code inside of obsidian).

However, I have noticed that everyone is shifting towards using AI-based solutions for note-taking. We now have AI-based image generators, text transcription, essay writers, essay shorteners, essay elongaters, writing letters for your valentine; you name it.

And, as not as big of a surprise, we have AI solutions for note-taking as well.

When AI features were introduced to popular note-taking apps -- like Notion, EverNote, etc. -- it created a huge hype. Obsidian too have many plugins that leverage AI capabilities directly (or indirectly) to 'enhance' note-taking.

But AI has its own problems. It hallucinates, as in it tends to make up data on its own. It has privacy issues, as in these data-heavy machines that use every bit of your information to make itself better.

For small vaults, consisting of around 10-100 notes, AI can be useful since you can find and make out if your AI has made any errors. However, what about the case when you have nearly thousands of notes?

It becomes practically challenging to detect any errors that your AI made.

Hello all, this is a great group with lots of good ideas. With the changing environment brought on by AI, I'm wondering if there is an app that would help with the following NoteTaking use case:

- Web-based to avoid cross-platform syncing issues where installation of apps is restricted (eg. can't install a native app on a corporate Windows machine)
- Email to note function (like Evernote)
- Note can be created from a web link (expand page content into note), document (multi-format eg. Word, Excel, PDF), freeform text note, images
- Query entire database using AI (eg. Chat with PDF or web site content)

This is in addition to the basic note-taking functionality found in most other apps like hashtags, text formatting, pinning, Support for lists, images, links, attachments, quotes, code blocks.

As many mention, Notion, OneNote and Evernote are good for different reasons but don't handle freeform management of assets. They require a structure that takes a long time to perfect and manage.

AlanG VIP Sep 2023

markusphan:

- Do you think using Obsidian (or similar apps) for various tasks affects its efficiency as a note-taking tool?
- Is there a point where adding too many functionalities becomes counterproductive?

This is why I'm so grateful that the Obsidian team chose to design towards a plugin ecosystem, *including all of the core features*.

Evernote became crap because they added everything under the sun, and the app was awful and bloated with features I never wanted to use.

With Obsidian, I simply turn off most of the core plugins, and my app is lean and fast. I install the few community plugins I need to get it working as my ultimate PKM and off I go.

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This market research provided the following insights:

1. There is vast potential for the Ai Note Takers and the future looks promising.
2. North America has the highest market cap of 38% due to high demand for productivity tools, robust tech infrastructure and cultural emphasis on innovation and productivity.
3. There are existing players in the market. [Otter.ai](#) and [Fireflies.ai](#) are leading the market share in AI notetakers with ~10Million and ~6million users respectively.
4. User insights:
 - a. Pros:
 - i. Efficient in querying and analyzing information
 - ii. Multiple use cases - notes, schedules, journaling, to write code
 - iii. Makes use of plugin ecosystem

- iv. Can configure the settings / features as per needs
- b. Cons:
 - i. Statement: "Ai note taking steals away the core function of writing which is understanding and being able to think about the subject"
 - ii. There are privacy concerns
 - iii. Ai hallucinates as it makes up data on its own. This can be a problem if there are too many notes as it becomes practically challenging to identify the errors made by ai
- c. Possible Features:
 - i. Email to note function like Evernote
 - ii. Query entire database using Ai
 - iii. Create notes from web page links, documents, images, audio etc.
 - iv. Web-based to avoid cross-platform syncing issues

Why do people take notes in general?

Why do people take notes in general? What is the JTBD of taking notes?

1. **Focus** - Taking notes can help to stay awake and pay attention.
2. **Understand** - Notes can help to understand the main concepts and connect key ideas.
3. **Remember** - Summarizing what is heard helps to retain the information.
4. **Prepare** - Notes can be a resource for studying, preparing for exams / meetings
5. **Action** - To track action items

Current Note Taking Methods:

1. **Hand written notes:** Written by hand on a piece of paper using pen or pencil.
 - a. Pros:
 - i. Handwriting notes aids memory retention due to the physical act of writing.
 - ii. It allows for greater flexibility in format and structure.
 - b. Cons:
 - i. Handwritten notes often require a solid surface to write on.
 - ii. They can be time-consuming and challenging to organize or search through.
 - iii. Limited backup options.
 - iv. Often require typing up.
2. **Typed Notes:** Typed using a keyboard instead of hand.
 - a. Pros:
 - i. Typing can be quicker than handwriting, particularly for those with fast typing skills.
 - ii. Typed notes are easily searchable and can be organized using digital tools.
 - b. Cons:
 - i. It's easy to become a passive note taker, mindlessly typing instead of engaging with the material.
3. **Speech to Text Dictation:** Converts spoken words into digital text on the screen
 - a. Pros:

- i. Quick and easy.
 - ii. Speech transcribed as you talk.
- b. Cons:
- i. Unstable internet connection can disrupt transcription.
 - ii. Fast talking and background noise, can affect transcription accuracy.
 - iii. On screen transcription delays during dictation, can interfere with thought flow.

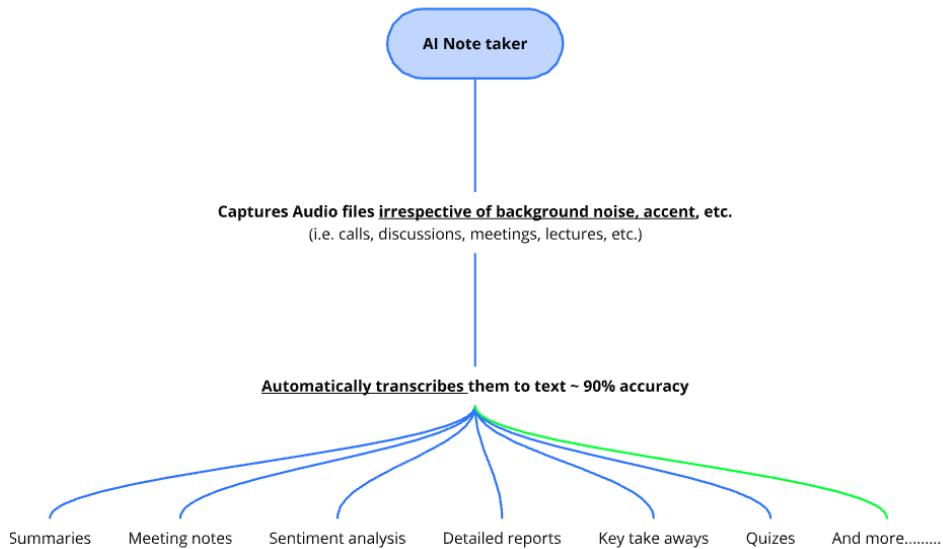
Why is AI Note Taking Better than Traditional Note taking?

AI note-taking presents a swift, simple and precise alternative to traditional note taking approaches. No more typing up handwritten notes from your notebook!

Record audio notes almost anywhere and let artificial intelligence handle transcription (no internet connection required) and processing wherever you have an internet connection.

AI note taking comes with remarkable benefits:

- It handles audio files in multiple languages,
- It can work with audio files that have background noise,
- It copes with audio files containing different accents.
- Transcribes audio files to text typically at 90% plus accuracy.
- Quickly converts transcribed text into summaries, meeting notes, detailed reports, key takeaways, talking points. The options are almost limitless!
- Processing times vary according to audio file size and transcribed text length.



How AI Can Assist with Report Generation?

In addition to speed and convenience when transforming transcribed text into a report, AI can also assist with:

Summarization: AI can help in summarizing the content of the meeting. Text summarisation techniques can be used to condense the information into a shorter form, highlighting the most important points, decisions made, and actions agreed upon.

Named Entity Recognition (NER): This is a process where AI identifies and categorises key information in the text such as people's names, companies, locations, dates, and other specific data. It can be particularly useful in recognising who was assigned specific tasks or responsibilities during the meeting.

Action Item Extraction: AI can also be trained to recognise and extract action items from the transcript. This often involves identifying certain patterns or phrases that indicate an action item (like "John will follow up on...").

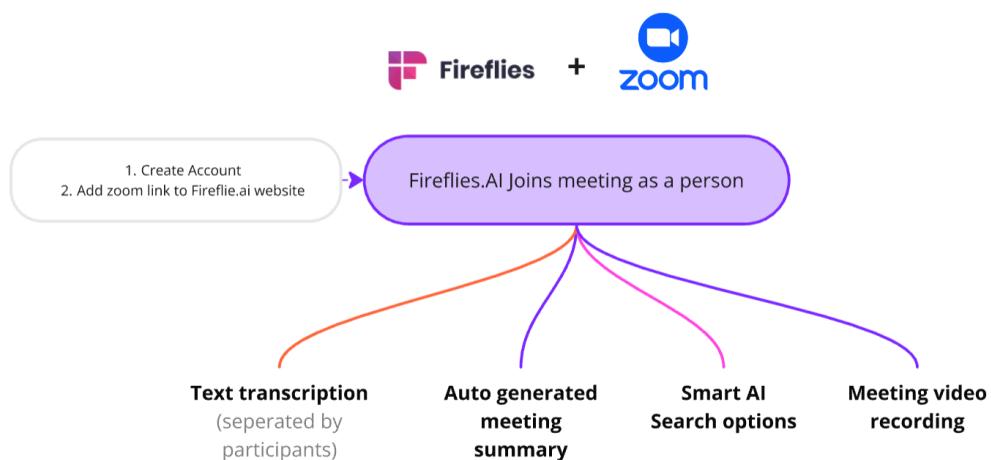
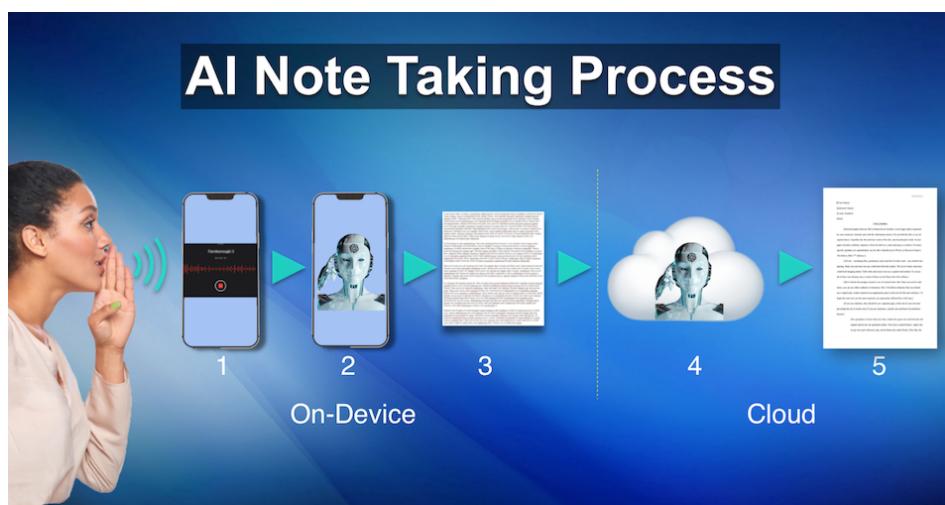
Sentiment Analysis: This involves the AI determining the sentiment conveyed in different parts of the meeting, which can give context to the report. For example, if a particular topic was met with negative sentiment, it can be worth noting in the report.

Topic Modeling: This involves identifying the main topics discussed in the meeting. AI can use techniques like Latent Dirichlet Allocation (LDA) to identify the main themes from the transcription.

Structuring the Report: AI can help structure the report in a logical and readable format. The report would typically include an introduction, the main topics discussed, key decisions made, action items, and a conclusion. AI can automate this process to some extent, though it might require some human intervention to ensure the final report is coherent and meaningful.

Quality Check: Machine learning algorithms can be used to assess the report for completeness, grammatical, and coherence, providing suggestions for improvement before the report is finalized.

How does an Ai Note Taker work?



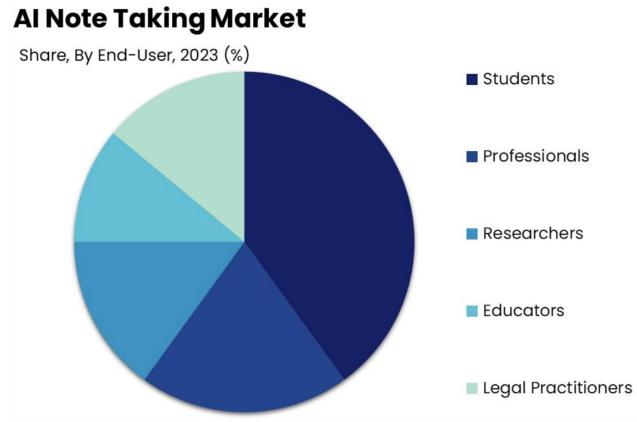
Who are the end users for an Ai Note Taker?

End User Analysis

Students held a dominant market position in the By End-User segment of the AI Note Taking Market, capturing more than a 40% share.

In 2023, Students were the primary end-users of AI note-taking solutions in 2023, capturing over 40% of the market share. The growing need for efficient and organized note-taking in educational settings has led to widespread adoption among students, who benefit from AI's ability to enhance their study practices and academic performance.

Professionals and Researchers are also significant users, leveraging AI tools to improve meeting productivity and streamline research documentation. Educators and Legal Practitioners are increasingly adopting AI note-taking solutions to manage teaching materials and case notes more effectively. As AI continues to evolve, its application across all end-user segments is expected to expand, further transforming traditional note-taking practices.



Analyzing the Top 3 User Segments

Students

How many students are there in this world?

University enrollment - 254 million students were enrolled in universities around the world in 2023, which is more than double the number in 2000.

High school and college enrollment - In October 2023, 21.4 million 16- to 24-year-olds, or 54.4% of youth, were enrolled in high school or college. This includes 9.5 million in high school and 11.9 million in college.

Hypothesis: The main JBTD for the students is to understand the content by creating a mental image and use the notes as future reference.

Should we consider targeting Students? This will be based on the students willingness to pay for an Ai Note Taker

User Interview 1:

Name: Parth Mehra

Occupation: Student

University: University of California Santa Barbara

Education: Bachelor of Accounting

Location: California, USA

Years of Education: 3 years

Tech Literacy: Advance

Statement: I write down notes as it helps me to remember when I am attending lectures.

Day-to-Day: Attends lectures in the university and then I hang out with my friends and study. On the weekends, I do a part time job to earn some money and pay for college.

Method to take notes: Pen and Paper; However, I don't take extensive notes.

Reason: Writing notes helps me to remember what was taught in the class. I don't write a lot of notes. I use the notes to reflect what was taught in the class.

Are the notes saved: I keep my notes till the quarter end, after that I discard my notes.

Challenge: Challenge is to keep up with the speed in class however the professors release the slides they use in class which suffices for the lack of speed

Would I pay for an Ai Note Taker: Maybe, there are so many out there in the market, if I thought of buying, I would buy the most reasonably priced one that serves the need. I don't think I would use this after the university gets over so not willing to spend much.

JTBD and VOS:

JTBD
1. Capture essential lecture information to reinforce learning and aid in exam preparation.
2. Comprehend lecture content by actively engaging with the material during class.
3. Refer to notes later for revision and reflection before exams.

VOS	VOS Description
Effective Recall	Parth is able to recall key lecture content during exams, demonstrating that his note-taking method is helping him retain the material.
Understanding of Concepts	Parth uses his notes to reflect on lectures, leading to a solid understanding of the concepts taught.
Comprehension	Parth actively engages in lectures and uses his notes to enhance his understanding, reflected in his ability to discuss and apply the concepts during and after lectures.
Ease of Reference	Ease of Reference: Parth can quickly and easily find and use his notes when preparing for exams, demonstrating that his notes are organized and thorough enough to serve as an effective study resource.

User Journey:

User Step	Attending Lectures	Studying and Reflecting	Working Part-Time Job
User Action	1. Attends accounting lectures regularly. 2. Listens to professors and tries to absorb the content being taught. 3. Occasionally takes brief notes using pen and paper.	1. Reviews brief notes taken during lectures. 2. Uses professor-provided slides for studying. 3. Reflects on the content of notes to reinforce learning.	1. Works on weekends to earn money for college expenses. 2. Juggles study and work responsibilities.
Goals	1. Understand and remember the key points from lectures. 2. Reflect on the lecture content for better retention.	1. Use notes and slides to understand the material thoroughly. 2. Prepare adequately for exams using notes.	1. Manage time effectively to balance work and study. 2. Use earnings to support education.
Experience	1. Finds it challenging to keep up with the speed of the lecture. 2. Relies on lecture slides provided by professors to fill in gaps.	1. Finds brief notes helpful for memory but relies heavily on lecture slides. 2. Discards notes at the end of each quarter once exams are over.	1. Feels time-constrained due to balancing work, study, and social life. 2. Notes do not play a significant role during part-time work hours.
Thoughts and Feelings	1. Feels slightly stressed when the lecture moves too quickly to take notes effectively. 2. Finds comfort knowing that lecture slides are available as a backup. Enjoys the process of writing notes to enhance memory retention.	1. Appreciates the simplicity of using pen and paper. 2. Feels that the notes, combined with slides, provide sufficient study material. 3. Is satisfied with the method as it serves the immediate purpose of exam preparation.	1. Feels the need to manage time efficiently. 2. Prioritizes job and study responsibilities effectively.

Insights:

- Reliance on Lecture Slides:**

- Parth uses professor-provided lecture slides as a primary source for studying, filling in gaps that he may miss during lectures. This reliance indicates that lecture slides are an essential resource for his academic success.

- Note-Taking as a Memory Aid:**

- Although Parth does not take extensive notes, the act of writing down brief points helps him remember lecture content. This suggests that note-taking is more about aiding memory retention rather than detailed documentation.

- **Balancing Study and Work:**

- Parth manages both his studies and a part-time job, indicating that he values efficient use of time. He prioritizes tasks to ensure he can handle both responsibilities effectively, which is crucial for his academic and financial goals.

- **Simplicity and Purpose:**

- Parth appreciates the simplicity of pen-and-paper note-taking and finds that his current method of using notes and lecture slides meets his needs for exam preparation. He discards notes after exams, highlighting a short-term focus on note retention.

- **Stress Management:**

- Parth feels stressed when lectures move too quickly, making it difficult to take notes. Knowing that slides are available helps alleviate this stress, providing a safety net for his learning.

Pain Points:

- **Keeping Up with Lecture Speed:**

- Parth finds it challenging to keep up with the pace of lectures when taking notes, leading to potential gaps in his understanding during class.

- **Limited Time for Study:**

- With the added responsibility of a part-time job, Parth experiences time constraints. Balancing work, study, and social life can be stressful and might impact his ability to allocate sufficient time for thorough study.

- **Short-Term Note Retention:**

- Since Parth discards notes at the end of each quarter, he lacks a long-term repository of knowledge that could be useful for cumulative learning or future reference.

- **Stress During Fast-Paced Lectures:**

- Quick lecture speed causes stress as Parth tries to absorb and record key points simultaneously. This can lead to gaps in his understanding if the slides are not comprehensive enough.

- **Manual Note-Taking Limitation:**

- Using pen and paper limits the amount of information Parth can capture during lectures, potentially leading to incomplete notes if he falls behind. This method may not be efficient for more detailed or complex subjects.

User Interview 2:

Name: Prasad Kumar

Occupation: Student

Post secondary education: Online Certification

Highest level of Education: Masters in Engineering

Location: Germany

Years of Education: 6 years

Tech Literacy: Advanced

Statement: I take notes because I love to write. Writing notes helps me to summarize the content I have read and use it as reference.

Day-to-Day: Attends lectures in the university and then I hang out with my friends and study. On the weekends, I do a part time job to earn some money and pay for college.

Method to take notes: Pen and Paper. Takes extensive notes

Reason: I enjoy writing notes as I like to physically write down the information. Writing helps me to create a mental picture of the content that I have read. I have ADHD so I scribble on my notes helping me to stay focused. Additionally, I create diagrams as I am a bit artistic and the diagrams help me to visualize the concepts. I reread my notes before continuing my studies as it helps me to remember.

Are the notes saved: Yes I save my notes for further reference.

Challenge: The only challenge I have to being able to find information from my notes

Would I pay for an Ai Note Taker: Maybe. I enjoy writing and nothing can beat that.

User Interview 3:

Name: Richa Jain

Occupation: Student

University: California State University, East Bay

Education: Masters in Economics

Location: California, USA

Years of Education: 4 years

Tech Literacy: Advanced

Statement: I take notes because I love to write. I like to refer to my notes when I study on my own.

Day-to-Day: Attends lectures in the university and then I work part time at a bank. On the weekends, I go out with my friends and study.

Method to take notes: Pen and Paper. Takes extensive notes

Reason: I enjoy writing notes as I like to physically write down the information. I like to use my notes to study as I don't like to reread the text book or listen to the lecture. Professors give out their notes and release the slides, however I don't like to refer to those as I rely on my notes.

Are the notes saved: Yes I save my notes for further reference.

Challenge: The only challenge I have to keeping up with the speed however most of the Professors go at a normal pace so its not much of a challenge. Sometimes I do like to just listen to the Professor and not take notes though.

Would I pay for an Ai Note Taker: No. I think its a passive method of learning and I like to be actively engaged when I am studying.

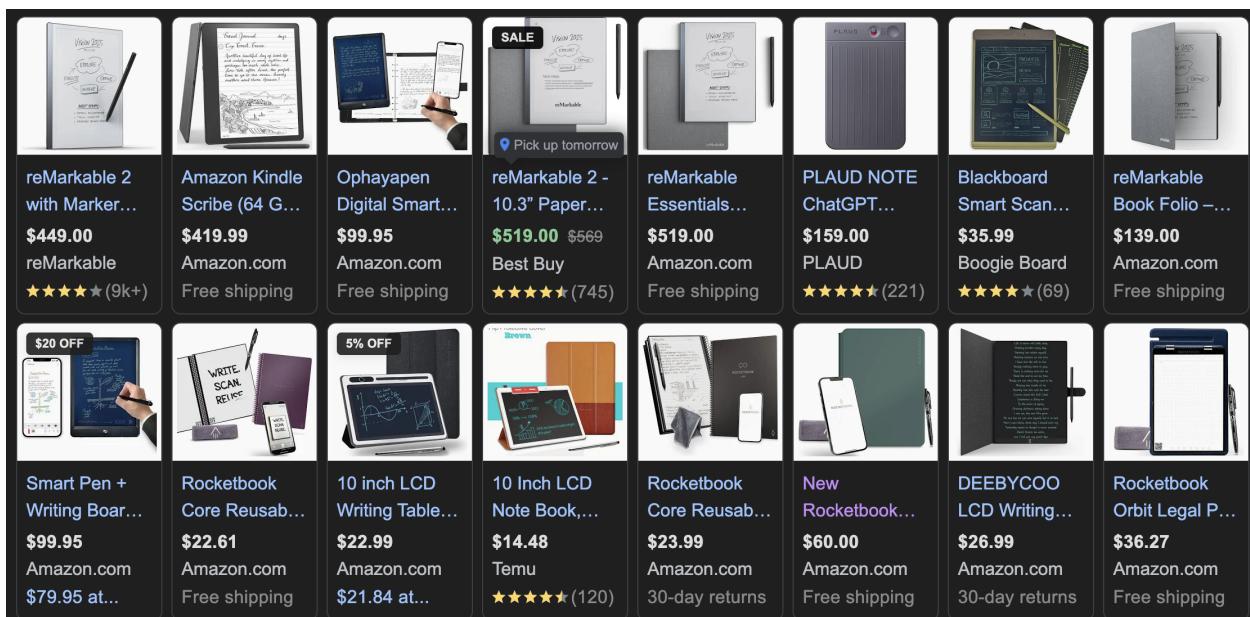
Should Students be the Target Audience?

Students actively take notes to create a mental image to remember and understand the contents. They use the notes for future reference. The physical notes are discarded after the exams/semester is done. Only critical notes are saved sometimes. They need something physical to actively write or type. They might get side tracked/distracted when not actively taking notes. Students may or may not pay for an Ai Note Taker and would prefer to use a free version over a paid version.

Target audience "Students" is not actively pursued considering the business aspect as they are not willing / willing to pay minimum for the product

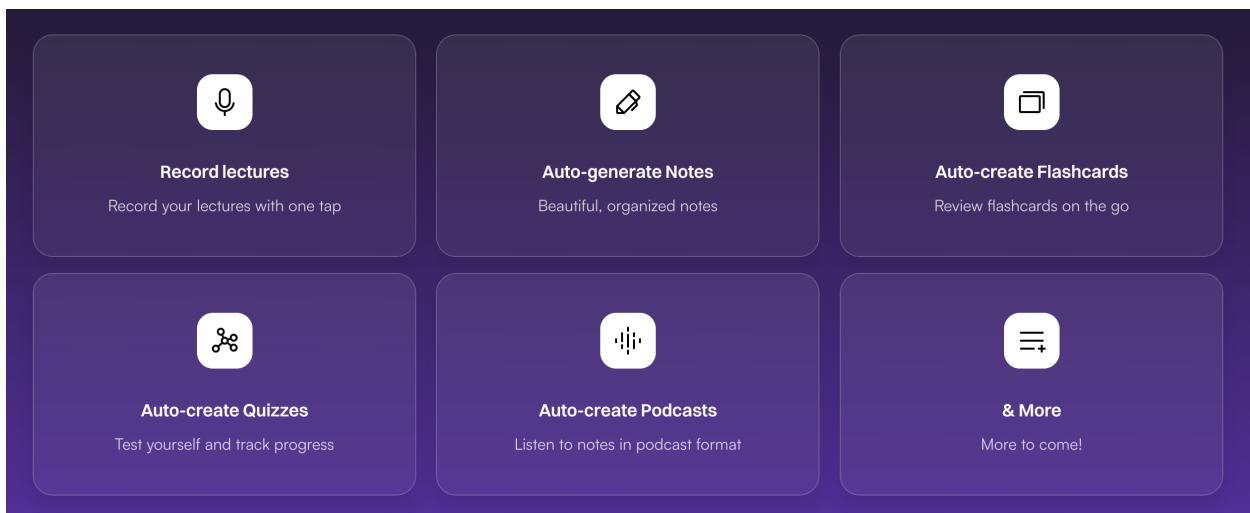
Existing solutions to resolve the problems

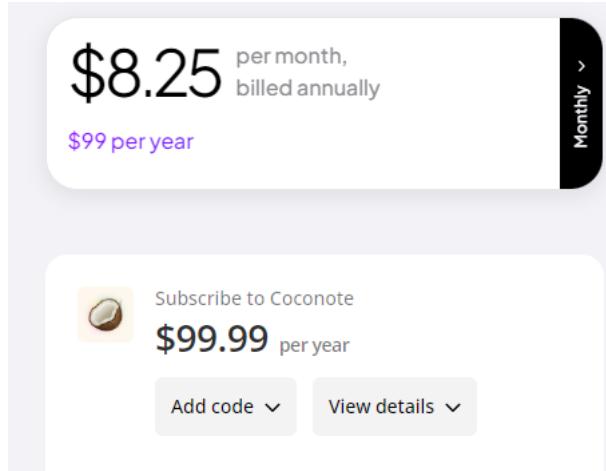
1. Digital Note Taker with a Pen



2. Note Taker App for Students - Example: Coconote App

<https://coconote.app/>





Reasons for considering Corporate Professionals as the Target Audience

Corporate professionals take notes to manage tasks, track meetings, and ensure alignment with business goals. These notes are crucial for decision-making, follow-ups, and maintaining accountability, however it is not the most important part of their job. It is an auxiliary task. Balancing active note-taking with full participation in discussions can be challenging. An AI note-taker can assist by capturing key points, ensuring nothing is missed, and allowing professionals to focus more on engagement and strategy. This enhances productivity and ensures that critical information is easily accessible for future reference. Additionally, Corporations are willing to invest in tools that add value to the professional's jobs.

Professionals

Corporate professionals – Product Managers, QA Engineer, Sales Manager, Investigations Manager (Compliance Research)

Hypothesis:

Why are notes taken?

1. To track down action items to deliver on time and as expected
2. To document the discussions

Why are notes not taken?

1. Fast paced meetings
2. No time to take notes during discussions

User Interview 1:

Name: Rachna Mehta

Occupation: Product Manager at Goldman Sachs, USA

Role: Product Manager handling multiple projects in finance, focusing on compliance and user needs.

Typical Day:

1. Starts with daily discussions with global engineering teams (Japan, India) to address open issues and provide compliance guidance.
2. Works on and participates in regulatory and internal audits.
3. Manages multiple projects, ensuring alignment between user needs and engineering solutions.
4. Continuously engages with end users to understand their requirements.
5. Resolves user issues in collaboration with the engineering team.
6. Manages relationships with various stakeholders.

Goals:

1. Ensure the engineering team meets compliance requirements.
2. Facilitate meetings and monitor engineering team progress.
3. Participate in audits and submit necessary documents on time.
4. Follow up on engineering progress and communicate updates to the compliance team.

Note-Taking Behavior:

1. Attends online meetings with 10 to 12 participants; uses OneNote for note-taking.
2. Does not record meetings due to privacy policies and the inefficiency of reviewing recordings.
3. Writes brief hints during meetings and rewrites them immediately afterward, then emails them to the team with the senior manager CC'd.
4. Takes notes during meetings to stay focused, even when not directly involved.
5. Finds transcribing entire meetings unnecessary.
6. Occasionally integrates notes from other team members into her follow-up emails.
7. Prefers not to collaborate on note-taking, viewing it as a personal task.

Best Practices:

1. Has used OneNote for five years and finds it effective.
2. Sends meeting agendas in advance to ensure participants are prepared.
3. Facilitates meetings and takes notes simultaneously using split-screen for MS Teams and OneNote.

Pain Points:

With Note-Taking:

1. Struggles to concentrate during meetings while taking notes constantly.
2. Feels that note-taking is not recognized as part of her core responsibilities and doesn't impact year-end assessments.
3. Redrafting notes takes at least 30 minutes before sharing with colleagues.
4. Finding specific information in OneNote can be challenging; previously had difficulty locating a particular point.

Without Note-Taking:

1. Finds it difficult to communicate effectively without reference notes, having tried skipping note-taking but found it challenging.

User Interview 2:

Name: Vasanth R.

Occupation: Regional Sales Head, Exxon Mobil Lubricants India

Role: Regional Sales Head for South India with 15+ years of experience, responsible for ~\$50 million in revenue.

Typical Day:

1. Arrives at work and checks emails.
2. Reviews task progress and assigns tasks to team members.
3. Generates and sends sales reports to management.
4. Attends meetings with functional heads (e.g., Marketing, Engineering) for updates on products and campaigns.
5. Plans and communicates tasks with team members based on meeting outcomes.

Goals:

1. Oversee South Indian sales activities.
2. Acquire new sales partners.
3. Manage relationships with existing partners.

4. Supervise team members.
5. Handle stakeholder management.

Note-Taking Behavior:

1. Primarily uses pen and paper; occasionally uses digital sticky notes.
2. Relies on Zoom for meetings, often with a fully booked calendar.
3. Takes notes less frequently, depending on meeting formality.
4. Uses sticky notes for long-term notes.
5. Delegates note-taking to team members or others as needed.
6. Sometimes sends minutes of meetings (MoM) to management.
7. Prefers using a laptop for communication; finds iPad note-taking ineffective.

Best Practices:

1. Assigns tasks via direct messages during meetings to ensure immediate action.
2. Delegates note-taking to less active meeting participants.
3. Encourages team members to record their own tasks.

Pain Points:

With Note-Taking:

1. Note-taking feels like a lengthy, distracting process that detracts from focusing on solutions during meetings.
2. Digital note-taking tools are inefficient and uncomfortable to use.
3. Taking notes during intense discussions disrupts the flow and can be a distraction.

Without Note-Taking:

1. Occasionally forgets to assign tasks to team members, only realizing during follow-up discussions.
2. Struggles with managing overwhelming amounts of data from various electronic devices, leading to difficulties in prioritizing tasks.

JTBD and VOS:

JTBD	
Oversee and manage the regional sales activities to drive revenue and maintain relationships with partners.	
Ensure effective communication and coordination within the team to align with business goals and strategies.	

VOS:

VOS	VOS Description
Task Delegation Efficiency	Effectively assigning tasks during meetings to ensure team members know their responsibilities.
Meeting Productivity	Maintaining focus on problem-solving during meetings without the distraction of taking extensive notes.
Information Management	Efficiently managing and prioritizing data from multiple sources (emails, reports, meetings).
Recall of Key Points	Remembering and referring to important discussion points without relying heavily on manual note-taking.
Time Management	Balancing time between taking notes, engaging in meetings, and other managerial tasks to avoid task overload.

Customer Journey:

User Step	Morning Routine and Task Review	Team Coordination and Task Assignment	Attending Meetings	Managing Reports and Documentation	Partner and Stakeholder Management	End-of-Day Review and Planning
User Action	<p>1. Arrives at the office and begins the day by checking emails.</p> <p>2. Reviews tasks completed from the previous day and tasks pending for the current day.</p> <p>3. Checks for updates from his team and any immediate issues requiring his attention.</p>	<p>1. Calls for a quick morning huddle with his direct reports.</p> <p>2. Assigns tasks based on the review of the day's priorities and any new directives.</p> <p>3. Uses direct messaging platforms to delegate tasks efficiently during the day.</p>	<p>1. Participates in several meetings throughout the day, including strategy meetings, sales performance reviews, and product update sessions.</p> <p>2. Attends meetings with functional heads (e.g., Marketing, Engineering) to discuss product campaigns and regional sales strategies.</p> <p>3. Engages actively in discussions, focusing on finding solutions and strategic planning.</p>	<p>1. Generates and sends out sales reports to upper management, summarizing the region's performance.</p> <p>2. Reviews data and metrics to create accurate and insightful reports.</p> <p>3. Occasionally documents Minutes of Meetings (MoM) for critical discussions.</p>	<p>1. Manages relationships with existing sales partners and seeks to acquire new ones.</p> <p>2. Communicates regularly with key stakeholders to keep them informed and engaged.</p> <p>3. Attends meetings and calls with partners to discuss sales strategies and performance.</p>	<p>1. Reviews the day's progress and outstanding tasks.</p> <p>2. Checks in with team members to get updates on ongoing tasks and projects.</p> <p>3. Prepares a to-do list for the next day based on the day's review.</p>
Goals	<p>1. Start the day with a clear understanding of ongoing tasks and priorities.</p> <p>2. Identify any urgent matters that need to be addressed first.</p> <p>3. Ensure smooth operations by keeping track of ongoing sales activities.</p>	<p>1. Ensure the team is aligned and clear about their responsibilities.</p> <p>2. Delegate tasks effectively to optimize team performance.</p> <p>3. Address any issues raised by the team promptly.</p>	<p>1. Gather information on product updates and marketing campaigns.</p> <p>2. Align sales strategies with product and marketing initiatives.</p> <p>3. Influence decision-making to favor regional sales goals.</p>	<p>1. Provide management with clear and accurate sales performance data.</p> <p>2. Use reports to highlight achievements and areas needing attention.</p> <p>3. Ensure transparency and accountability in communication.</p>	<p>1. Strengthen relationships with current partners to maintain sales performance.</p> <p>2. Identify and onboard new partners to expand regional market reach.</p> <p>3. Keep stakeholders informed about regional sales activities and performance.</p>	<p>1. End the day with a clear understanding of what was accomplished.</p> <p>2. Identify tasks that need to be carried over to the next day.</p> <p>3. Plan for the next day's activities to maintain productivity.</p>
Experience	<p>1. Finds email checks to be routine but critical for staying updated.</p> <p>2. Uses pen and paper or digital sticky notes to jot down key points or reminders.</p> <p>3. Feels that reviewing tasks helps him maintain control and direction over his team's activities.</p>	<p>1. Finds direct messaging an efficient way to assign and follow up on tasks.</p> <p>2. Prefers real-time communication for immediate task assignment and updates.</p> <p>3. Sometimes delegates note-taking to other team members or uses brief notes for key action items.</p>	<p>1. Finds meetings valuable for gathering insights and setting direction but also time-consuming.</p> <p>2. Prefers to engage in discussions rather than taking notes, which he finds distracting.</p> <p>3. Delegates note-taking to team members to focus on the meeting content.</p>	<p>1. Finds report generation to be routine but crucial for management decisions.</p> <p>2. Uses pen and paper or simple digital tools to note key data points during meetings.</p> <p>3. Delegates detailed note-taking to team members to follow up with all stakeholders due to time constraints.</p>	<p>1. Enjoys interacting with partners and stakeholders, finding it rewarding to build strong relationships.</p> <p>2. Uses informal notes to remember key points from partner discussions.</p> <p>3. Sometimes struggles to follow up with all stakeholders due to time constraints.</p>	<p>1. Finds end-of-day reviews helpful for staying organized.</p> <p>2. Uses pen and paper or digital sticky notes to jot down key tasks and reminders.</p> <p>3. Sometimes feels the burden of tasks that remain incomplete.</p>

Thoughts and Feelings	1. Feels organized and ready to tackle the day after reviewing tasks. 2. Enjoys the routine of morning task reviews as it provides structure. 3. Slightly concerned about keeping up with the volume of emails and tasks.	1. Feels empowered by the ability to coordinate the team effectively. 2. Sometimes experiences frustration when team members miss out on important tasks or misunderstand instructions. 3. Values having a clear line of sight on what each team member is doing.	1. Feels frustrated when meetings drag on without clear outcomes or actions. 2. Values meetings that lead to actionable insights and clear next steps. 3. Occasionally feels overwhelmed by the number of meetings in a day.	1. Feels confident in his ability to generate useful reports. 2. Finds it challenging to consolidate data from multiple sources. 3. Sometimes feels bogged down by the repetitive nature of report creation.	1. Feels proud of the relationships he has built over the years. 2. Occasionally feels pressured to maintain high performance and keep all stakeholders satisfied. 3. Desires more streamlined communication to manage partner expectations effectively.	1. Feels a sense of accomplishment when reviewing tasks completed. 2. Occasionally feels stressed about carrying over tasks and deadlines. 3. Values the sense of control and preparedness that end-of-day planning provides.

Summarized Insights:

1. Structured Morning Routine:

- Vasanth begins his day with a review of emails and tasks, which helps him maintain control and direction over his team's activities.

2. Team Coordination is Key:

- Vasanth values effective communication and coordination with his team, using morning huddles and direct messaging to align tasks and responsibilities.

3. Meeting-Centric Role:

- He participates in multiple meetings throughout the day, focusing on strategic planning and sales performance. Vasanth prefers active engagement over note-taking.

4. Reporting for Accountability:

- Generating sales reports is a routine but essential part of Vasanth's role, providing insights to upper management and ensuring transparency.

5. Relationship Management:

- Managing relationships with partners and stakeholders is a rewarding aspect of Vasanth's job, critical for maintaining and expanding market reach.

6. End-of-Day Review:

- Vasanth finds end-of-day reviews helpful for staying organized and preparing for the next day, which supports his productivity and planning.

Pain Points/Problems:

1. Email Overload:

- Vasanth feels slightly concerned about keeping up with the volume of emails and tasks, which could lead to important matters being overlooked.

2. Meeting Fatigue:

- While meetings are valuable, Vasanth sometimes feels overwhelmed by their number and finds it frustrating when meetings lack clear outcomes.

3. Documentation Challenges:

- Vasanth finds it challenging to consolidate data from multiple sources for reports, indicating a need for more streamlined reporting processes.

4. Time Constraints with Stakeholders:

- Following up with all stakeholders can be difficult due to time constraints, potentially affecting communication and relationship management.

5. Stress from Pending Tasks:

- Vasanth occasionally feels stressed about carrying over tasks to the next day, impacting his sense of control and accomplishment.

User Interview 3:

Name: Maya Patel

Occupation: Senior QA, HemoGo,

Role: Senior QA working remotely with teams in India and the UK.

Typical Day:

1. Works 100% remotely, starting the day by verifying task completion from the previous day.
2. Reviews tasks assigned by project leads and prioritizes them.
3. Writes down tasks on digital sticky notes for personal reference.
4. Works on tasks via DevOps, following the priorities set.

Goals:

1. Complete tasks on time, adhering to priority levels.
2. Ensure software is delivered bug-free and as per the business requirement document.
3. Accurately understand project requirements during discussions.

Note-Taking Behavior:

1. Primarily uses digital sticky notes for ease of use, autosave features, and compact UX.
2. Notes down action items as bullet points and deletes them once tasks are completed.
3. Maintains a backlog sticky note for long-term tasks.
4. Avoided Notepad due to lack of autosave, bullet points, and it being cumbersome to use.
5. Uses OneNote for documenting project progress and discussions with the team.
6. Takes notes to remember discussion points and prioritize action items.
7. Refers to meeting recordings when available, finding them useful for catching missed points.
8. Occasionally uses pen and paper for note-taking, later transferring to sticky notes.
9. Prefers listening to recordings over reading transcripts, as they are easier to manage.

Pain Points:

Using Sticky Notes:

1. Unable to categorize tasks by priority.
2. Lacks search functionality for finding specific information.
3. No reminder options.

Using OneNote:

1. Reluctant to use another app, as it occupies too much space on the screen.

With Note-Taking:

1. Struggles to concentrate on meetings while taking notes.

Without Note-Taking:

1. Sometimes misses key discussion points and has difficulty focusing, especially during network issues.

With Recording Meetings:

1. Long recordings can be overwhelming without summaries, making it difficult to review meetings that last over an hour.

JTBD and VOS:

JTBD	VOS
<ul style="list-style-type: none"> - Ensure that software is delivered bug-free and meets the business requirement documents by accurately understanding project requirements and completing tasks on time. - Keep track of discussions, tasks, and project progress through efficient note-taking and documentation. 	<ul style="list-style-type: none"> - Task Completion Rate: Successfully completing tasks as per the set priorities and within deadlines. - Bug-Free Delivery: Ensuring that software is delivered with minimal to no bugs, meeting quality standards. - Documentation Quality: Maintaining accurate and thorough documentation of project progress and meeting discussions. - Meeting Effectiveness: Ability to capture key points during meetings and refer back to meeting recordings efficiently. - Tool Efficiency: Effectiveness of digital tools (e.g., sticky notes, OneNote) in managing tasks, priorities, and documentation. - Work-Life Balance: Maintaining a balance between work demands and personal time, reducing stress from workload and information overload.

Customer Journey:

User Step	Start of the Day - Task Verification	Reviewing and Prioritizing Tasks	Task Execution	Attending Meetings and Discussions	Documentation and Progress Tracking	End of Day Review and Planning
User Action	<ol style="list-style-type: none"> 1. Logs into her computer remotely at the start of the workday. 2. Checks DevOps or other task management tools to verify task completion from the previous day. 3. Reviews any updates or notifications received overnight from the team or project leads. 	<ol style="list-style-type: none"> 1. Opens her task management tool (e.g., DevOps) to review tasks assigned by project leads. 2. Prioritizes tasks based on deadlines, importance, and impact. 3. Updates her digital sticky notes to reflect the priority of tasks for the day. 	<ol style="list-style-type: none"> 1. Works on assigned tasks using DevOps, following the set priorities. 2. Refers to digital sticky notes to ensure she is working on the correct tasks. 3. Occasionally consults with team members or project leads for clarification on task requirements. 	<ol style="list-style-type: none"> 1. Participates in virtual meetings with teams in India and the UK to discuss project updates, requirements, and issues. 2. Takes notes using OneNote or digital sticky notes to capture key points and action items. 3. Refers to meeting recordings if available to review discussions and ensure nothing was missed. 	<ol style="list-style-type: none"> 1. Uses OneNote to document project progress, discussions, and key decisions. 2. Maintains a backlog of tasks on digital sticky notes for long-term items. 3. Updates notes regularly to reflect task completion and new information. 	<ol style="list-style-type: none"> 1. Reviews the day's accomplishments and updates her digital sticky notes. 2. Verifies task completion and adjusts priorities for the next day. 3. Logs off from work with a to-do list ready for the following day.
Goals	<ol style="list-style-type: none"> 1. Begin the day with a clear understanding of what has been completed and what is pending. 2. Ensure that tasks are on track and aligned with the project timelines. 3. Identify any blockers or issues that need immediate attention. 	<ol style="list-style-type: none"> 1. Focus on the most critical tasks first to meet deadlines and project goals. 2. Maintain a clear understanding of task priorities to manage her time effectively. 3. Ensure all high-priority tasks are completed to prevent project delays. 	<ol style="list-style-type: none"> 1. Complete tasks on time while ensuring quality and adherence to project requirements. 2. Deliver bug-free software that meets the specifications outlined in the business requirement document. 3. Maintain productivity and efficiency throughout the workday. 	<ol style="list-style-type: none"> 1. Gain a clear understanding of project requirements and updates. 2. Collaborate effectively with team members and project leads. 3. Capture all necessary information to complete tasks accurately and efficiently. 	<ol style="list-style-type: none"> 1. Keep a detailed record of project progress and any changes in requirements. 2. Ensure that all critical information is documented for future reference. 3. Maintain a clear understanding of what has been completed and what remains. 	<ol style="list-style-type: none"> 1. End the day with a clear understanding of what was achieved. 2. Prepare for the next day to ensure a productive start. 3. Keep track of long-term tasks and action items.

Experience	<p>1. Finds task verification to be a routine but necessary part of her day.</p> <p>2. Uses digital sticky notes to quickly jot down reminders or action items.</p> <p>3. Prefers starting her day in a systematic and organized manner to avoid missing critical tasks.</p>	<p>1. Finds digital sticky notes useful for maintaining a quick reference to prioritized tasks.</p> <p>2. Prefers a visual and organized approach to task management to keep track of multiple priorities.</p> <p>3. Sometimes finds it challenging to juggle high-priority tasks with other ongoing responsibilities.</p>	<p>1. Finds digital sticky notes convenient for tracking tasks and referring to key action items.</p> <p>2. Prefers concise and clear task descriptions to avoid misunderstandings.</p> <p>3. Uses a combination of tools (e.g., sticky notes, DevOps, communication platforms) to manage tasks.</p>	<p>1. Finds note-taking during meetings necessary but sometimes struggles to concentrate on both taking notes and engaging in discussions.</p> <p>2. Prefers listening to recordings over reading transcripts for ease of reference and comprehension.</p> <p>3. Uses OneNote for more detailed documentation and sticky notes for quick references.</p>	<p>1. Finds OneNote useful for detailed documentation but prefers digital sticky notes for quick, daily task tracking.</p> <p>2. Appreciates autosave features and the ability to use bullet points for organized notes.</p> <p>3. Occasionally feels the need for better categorization and search functionality in her note-taking tools.</p>	
Thoughts and Feelings	<p>1. Feels a sense of responsibility to ensure all tasks are progressing as planned.</p> <p>2. Sometimes feels overwhelmed if there are too many incomplete tasks or issues.</p> <p>3. Values the ability to get an overview of tasks quickly to set the tone for the day.</p>	<p>1. Feels in control when tasks are clearly prioritized and organized.</p> <p>2. Experiences stress if too many tasks are labeled as high-priority simultaneously.</p> <p>3. Appreciates tools that help her visualize and manage task priorities efficiently.</p>	<p>1. Feels productive and accomplished when tasks are completed as planned.</p> <p>2. May feel frustrated if tasks take longer than expected or if unclear requirements cause delays.</p> <p>3. Appreciates having well-defined tasks to work on, as it reduces confusion and enhances focus.</p>	<p>1. Feels connected and informed during meetings, especially when the discussions are productive and informative.</p> <p>2. Experiences frustration when network issues disrupt meetings or when discussions are unclear.</p> <p>3. Values the ability to refer back to meeting recordings for clarification and context.</p>	<p>1. Feels secure knowing that documentation is up-to-date and easily accessible.</p> <p>2. Sometimes feels overwhelmed by the amount of information to document and track.</p> <p>3. Desires more efficient ways to categorize and search for information within her notes.</p>	<p>1. Feels satisfied and accomplished when reviewing completed tasks.</p> <p>2. Occasionally feels stressed if there are many pending tasks or unresolved issues.</p> <p>3. Values having a consistent routine for ending her workday, which helps with work-life balance.</p>

Summarized Insights:

1. Structured Start of the Day:

- Maya values starting her day with a systematic check of tasks using DevOps or task management tools, which helps her feel organized and prepared.

2. Importance of Prioritization:

- She uses digital sticky notes to prioritize tasks, focusing on deadlines and impact, which enables her to manage time and stress effectively.

3. Task Execution and Quality Focus:

- Maya follows a structured approach to completing tasks, emphasizing quality and adherence to requirements. She appreciates clear and concise task descriptions.

4. Meetings as Information Sources:

- Virtual meetings play a crucial role in understanding project requirements and updates. Maya uses note-taking to capture key points but finds it challenging to balance note-taking and active participation.

5. Documentation for Clarity and Reference:

- Maya relies on OneNote for detailed documentation and digital sticky notes for quick references, highlighting the need for both comprehensive and accessible records.

6. End-of-Day Review:

- Reviewing her day's work and planning for the next day is essential for Maya, helping her stay organized and reduce stress.

Pain Points/Problems:

1. Overwhelm from Task Verification:

- Maya sometimes feels overwhelmed if there are too many incomplete tasks or issues during her initial task review.

2. Stress from Multiple High-Priority Tasks:

- Handling multiple high-priority tasks simultaneously can be stressful and challenging for Maya.

3. Balancing Note-Taking and Participation in Meetings:

- Maya struggles to concentrate on both taking notes and engaging actively in discussions, affecting her focus and understanding.

4. Documentation Management Challenges:

- Maya occasionally feels the need for better categorization and search functionality in her note-taking tools, indicating that current solutions may not fully meet her needs.

5. End-of-Day Stress:

- If many tasks remain incomplete by the end of the day, Maya feels stressed, impacting her sense of accomplishment and work-life balance.

User Interview 4:

Name: Prayash Kapadia

Occupation: Compliance Investigations Manager, Goldman Sachs

Role: Conducts intense investigations relating to financial crimes escalated from Level 1 investigators at Goldman Sachs and reports suspicious activity to the Regulators.

Typical Day:

1. Reviews escalations received from Level 1 investigators, line and divisional compliance managers, and trade desk escalations. For each escalation, review market news, trading activities, analyze different risks associated and then, form a conclusion whether a Suspicious Activity Report should be filled.
2. Draft the SAR report and file to Fincen post manager approval.
3. Communicate findings to External Regulators on pressing matters and provide feedback received from Regulators to internal teams.

Goals:

1. Complete Investigative Report within the time limit set by Regulators
2. Identify all the risks associated with a trade / transaction
3. Ensure proper compliance

Note-Taking Behavior:

1. Takes notes in Excel. Takes screenshots of the news articles and other relevant information received and pastes it on Excel sheet.
2. Notes are taken in Excel as I have to analyze quantitative trade data which is retrieved from a trade retrieval system and is exported in Excel. Excel helps me to keep everything together in one place. Additionally, the screenshots help me to justify my point when someone comes back and asks me questions.
3. I save all the notes for future reference as the regulators can come back anytime to inquire about something about a SAR filing. Also, I use it to show as an example to any new joiner to bring them up to speed.

Pain Points:

1. I have to keep switching between multiple different tabs when I have to find a piece of information so now I have created a structured way of keeping my excel sheet to reduce time toggling.
2. When I keep toggling, I am able to remember most of the pointers in the notes, so its not such a big challenge.

3. It is difficult to write the detailed investigative report as the language has to be in a proper format as it has to be submitted to the external regulators.

JTBD and VOS:

JTBD
Receive, review, and understand escalations from Level 1 investigators and compliance managers.
Collect relevant data from market news, trading activities, and internal documents.
Analyze the gathered information to identify potential compliance risks.
Cross-reference various data points to ensure a holistic understanding of each case.
Prepare detailed and accurate Suspicious Activity Reports (SAR) based on the findings. Ensure that reports meet regulatory standards and are filed within the required deadlines.
Present investigation outcomes to regulators and internal teams effectively.
Utilize past case documentation to train new team members and inform ongoing investigations.

VOS	VOS Description
Accuracy and Thoroughness of Analysis	Successfully identifying all relevant risks associated with each case.
Timeliness of Reporting	Filing SAR reports within the regulatory deadlines to avoid penalties and ensure compliance.
Quality of SAR Reports	Producing clear, detailed, and well-formatted SAR reports that meet or exceed regulatory standards.
Effective Communication with Regulators and Teams	Clearly communicating findings and feedback to regulators and internal teams to enhance compliance processes.
Organization and Accessibility of Documentation	Having well-organized, easily accessible documentation for future reference or inquiries.
Reduction in Compliance Issues	Improving the internal compliance processes based on feedback and past investigation outcomes.

Customer Journey Map:

User Step	Receiving and Reviewing Escalations	Gathering and Documenting Information	Conducting Risk Analysis and Forming Conclusion	Drafting and Filing SAR Report	Communicating Findings to Regulators and Internal Teams	Retaining Documentation for Future Reference	
User Action	<ul style="list-style-type: none"> - Receives escalations from Level 1 investigators, line, and divisional compliance managers. - Reviews escalations and relevant documentation. - Checks market news and trading activities. - Analyzes various risk factors associated with each case. 	<ul style="list-style-type: none"> - Gathers information from various sources such as market news, trading data, and risk assessments. - Takes notes in Excel, including screenshots of relevant news articles. - Analyzes quantitative trade data exported to Excel. 	<ul style="list-style-type: none"> - Analyzes all gathered information to identify potential risks. - Cross-references data to ensure a thorough understanding of the case. - Forms a conclusion on whether a Suspicious Activity Report (SAR) should be filed. 	<ul style="list-style-type: none"> - Drafts the SAR report, ensuring it is detailed and formatted correctly. - Files the approved SAR report to FinCEN. 	<ul style="list-style-type: none"> - Communicates findings on pressing matters to external regulators. - Provides feedback from regulators to internal teams for improvement. - Uses documented notes and reports to support communications. 	<ul style="list-style-type: none"> - Saves notes, screenshots, and reports for future reference. - Uses saved documentation to train new team members. - Keeps records for potential inquiries from regulators. 	
Goals	<ul style="list-style-type: none"> - Quickly understand the context and severity of the escalation. 	<ul style="list-style-type: none"> - Ensure all relevant information is readily available 	<ul style="list-style-type: none"> - Accurately identify all risks and reach a well-informed conclusion. 	<ul style="list-style-type: none"> - Draft a comprehensive, accurate, and well-formatted SAR report. 	<ul style="list-style-type: none"> - Ensure transparent and effective communication with regulators. 	<ul style="list-style-type: none"> - Maintain a comprehensive archive of investigations. - Facilitate 	

	<ul style="list-style-type: none"> - Identify all relevant risks associated with the case. 	for analysis and reference.	<ul style="list-style-type: none"> - Ensure the compliance and integrity of the investigation process. 	<ul style="list-style-type: none"> - Meet deadlines set by regulators. - Ensure that the report meets the required standards for compliance. 	<ul style="list-style-type: none"> - Improve internal processes based on regulatory feedback. 	<ul style="list-style-type: none"> training and onboarding of new employees. - Be prepared for any future inquiries regarding past investigations. 	
Experience	<ul style="list-style-type: none"> - Efficiently handles multiple escalations. - Feels confident when all the information is consolidated and easily accessible. 	<ul style="list-style-type: none"> - Relies heavily on Excel to keep everything together. - Faces challenges when toggling between multiple sources. - Sometimes finds it time-consuming to consolidate all information in one place. 	<ul style="list-style-type: none"> - Feels confident in conducting risk analysis due to structured data in Excel. - Can justify conclusions with evidence from notes and data. - Finds satisfaction in reaching conclusive findings. 	<ul style="list-style-type: none"> - Finds it challenging to write detailed reports in the required formal language. - Seeks feedback from managers to improve report quality. - Feels the responsibility of reporting accurately to regulators. 	<ul style="list-style-type: none"> - Relies on detailed notes and structured reports for effective communication. - Uses feedback sessions to enhance compliance and investigative procedures. - Values clear and concise communication for transparency. 	<ul style="list-style-type: none"> - Finds it helpful to have a well-organized archive. - Values the ability to reference past cases to inform current investigations. - Appreciates having examples to use for training. 	
Thoughts and Feelings	<ul style="list-style-type: none"> - Feels slightly overwhelmed when faced with a high volume of escalations. - Finds satisfaction in solving complex cases. - Appreciates a structured and organized approach. 	<ul style="list-style-type: none"> - Feels frustrated when switching between multiple tabs, which slows down the process. - Prefers Excel as it provides a consolidated view of data. - Worries about missing crucial information if not careful. 	<ul style="list-style-type: none"> - Feels pressure to identify all risks accurately. - Experiences satisfaction when successfully identifying potential suspicious activities. - Seeks clarity and precision in the decision-making process. 	<ul style="list-style-type: none"> - Experiences anxiety about meeting regulatory deadlines. - Feels a sense of responsibility to ensure compliance. - Desires tools or templates to streamline report drafting. 	<ul style="list-style-type: none"> - Feels confident when prepared with detailed documentation. - Seeks to maintain trust and credibility with regulators. - Feels a sense of achievement when feedback results in improved processes. 	<ul style="list-style-type: none"> - Feels secure knowing that documentation is available if needed. - Takes pride in maintaining organized and thorough records. - Feels proactive in using past cases to train and improve team efficiency. 	

Summarized Insights:

1.

Efficient Escalation Review:

- Prayash handles multiple escalations effectively, seeking to understand context and risks quickly, which is crucial for his role in compliance.

2.

Information Gathering Focus:

- He uses various sources, like market news and trading data, to gather comprehensive information, with Excel being his primary tool for documentation and analysis.

3.

Structured Risk Analysis:

- Prayash conducts thorough risk analysis, using structured data to reach conclusions, and feels confident in his ability to identify suspicious activities.

4.

Detailed SAR Reporting:

- Drafting SAR reports is a critical part of Prayash's job, and he values accuracy and adherence to regulatory standards, often seeking feedback for improvement.

5.

Communication for Compliance:

- Effective communication with regulators and internal teams is vital, ensuring transparency and facilitating improvements based on feedback.

6.

Retention of Documentation:

- Maintaining a comprehensive archive of investigations is important for Prayash, supporting future inquiries and training new team members.

Pain Points/Problems:

1.

Overwhelm from High Volume of Escalations:

- Prayash feels slightly overwhelmed when faced with a high volume of escalations, which can impact his efficiency and focus.

2.

Time-Consuming Information Consolidation:

- Gathering and consolidating information from multiple sources can be time-consuming and frustrating, particularly when toggling between tabs.

3.

Pressure of Accurate Risk Identification:

- Prayash feels pressured to accurately identify all risks, as missing crucial information could lead to compliance issues.

4.

Anxiety over Regulatory Deadlines:

- Drafting SAR reports under tight regulatory deadlines causes anxiety, highlighting a need for tools or templates to streamline the process.

5.

Communication Challenges:

- While communication with regulators is essential, Prayash feels a need for clearer and more concise ways to communicate findings and expectations.

User Problems

PART 3**PAIN POINTS OF TAKING NOTES IN GENERAL**

User Personas	Pain Point	Population	Frequency	Impact	Priority Score	Priority
Senior QA Engineer at Hemgo (Maya Patel) Compliance Investigations Manager at Goldman Sachs ()	Struggles to focus during meetings and taking notes, risks missing key points	High (3)	High (3)	High (3)	9	P0
Senior Marketing Manager (Ethan Parker) & Compliance Investigations Manager at Goldman Sachs (John Miller)	Toggling between tools to take notes are disturbing during the meeting	Medium (2)	High (3)	High (3)	8	P1
Senior QA Engineer at Hemgo (Maya Patel)	No task prioritization or reminders	Medium (2)	Medium (2)	High (3)	7	P2
Compliance Investigations Manager at Goldman Sachs (John Miller)	Difficult to manage large data volumes accurately	Medium (2)	Medium (2)	Meidum (2)	6	P4
Compliance Investigations Manager at Goldman Sachs (John Miller)	Challenged by drafting reports in the required format	Medium (2)	Low (1)	High (3)	6	P4
Senior QA Engineer at Hemgo (Maya Patel)	Reviewing all the details from lengthy meeting recordings can be time-consuming, so having summarized highlights can streamline the process.	Low (1)	Moderate (2)	Moderate (2)	5	P4
Senior Marketing Manager (Ethan Parker)	Note-taking feels repetitive and undervalued	Medium (2)	Low (1)	Medium (2)	6	P4
Compliance Investigations Manager at Goldman Sachs (John Miller)	High pressure to meet deadlines	Low (2)	Low (1)	High (3)	6	P5

PART 3
PAIN POINTS OF USING AN AI NOTE TAKER

User Persona	Pain Points Regarding AI Note-Taker	Population	Frequency	Impact	Priority Score	Priority
• John Miller (Compliance Investigations Manager) • Maya Patel (Senior QA Engineer) • Ethan Parker (Senior Marketing Manager)	"Concerned that AI might not fully understand the nuanced details and context of my investigations and discussions, potentially leading to misinterpretations or incomplete insights/summary."	High (3)	High (3)	High (3)	9	P0
Maya Patel (Senior QA Engineer)	"Introducing another note-taking tool seems unnecessary; our current system is sufficient."	High (3)	High (3)	Medium (2)	8	P1
John Miller (Compliance Investigations Manager)	"Hesitant to rely on AI for critical tasks, fearing loss of accuracy or oversight."	High (3)	Medium (2)	High (3)	8	P1
Maya Patel (Senior QA Engineer)	"Transcripts add little value since we need to prioritize actionable test results and bug reports."	High (3)	Medium (2)	Medium (2)	7	P2
Maya Patel (Senior QA Engineer)	"Going through recorded meetings is time-consuming and cumbersome."	Medium (2)	Medium (2)	Medium (2)	6	P2
Ethan Parker (Senior Marketing Manager)	"Wary of AI tools potentially slowing down my workflow due to unfamiliarity."	Medium (2)	Medium (2)	Medium (2)	6	P2
Ethan Parker (Senior Marketing Manager)	"I'm concerned about compliance and prefer sticking to company-approved tools."	Medium (2)	Medium (2)	Low (1)	5	P3
John Miller (Compliance Investigations Manager)	"Prefers the control and familiarity of a manual Excel system."	Low (1)	Medium (2)	Medium (2)	5	P3
Ethan Parker (Senior Marketing Manager)	"Would only consider using an AI note-taker for high-stakes meetings initially."	Medium (2)	Low (1)	Low (1)	4	P4

Calculations are based on below formula

Population - Number of users who faced this problem

Frequency - Sum of (1-5) how many times users faced the problem /# users who faced the problem

Impact - Sum of (1-3) how much the users were impacted by the problem/#users who were impacted by the problem

Priority score - Population * Frequency * Impact

Possible Solutions

PART 4

POSSIBLE SOLUTIONS

Problem statement	Possible solutions
P0: Concerned that AI might not fully understand the nuanced details and context of my investigations and discussions, potentially leading to misinterpretations or incomplete insights/summary.	<ul style="list-style-type: none">Developing an AI that is specifically trained to understand and replicate my unique persona style, including communication preferences, decision-making processes, and investigative approaches, to ensure that it accurately reflects and supports my personal style in various contexts.Developing an AI that is not only trained to understand and replicate my unique persona style but also equipped with specialized domain expertise relevant to my industry, ensuring it accurately reflects my personal approach while being adept in industry-specific knowledge and practices.
P1: Introducing another note-taking tool seems unnecessary; our current system is sufficient.	<ul style="list-style-type: none">Integrate AI directly into popular communication platforms such as Slack, Teams, or Zoom, rather than developing it as a separate standalone application. This approach streamlines access and enhances usability by embedding the AI into tools that users already utilize for their daily communications and workflow.