60-MINUTE TRIAL GUIDE

AI Research Tools

STEP 1

Pick a focused trial date and select your tools

STEP 2

Define what you want to learn

STEP 3

Gather your transcripts

STEP 4

Upload transcripts to the tool and begin trial

STEP 5

Run topic and insight analysis

STEP 6

Check and curate your results

STEP 7

Synthesise, export and share

STEP 8

Quick feedback loop

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Here's a step-by-step guide focused on a trialist uploading their own transcripts, quickly validating an AI research tool, and sharing/synthesising the results. Aimed at getting clear value in 30 minutes.

This approach lets anyone validate both the AI analysis and export/share workflow without fiddling with integrations, letting your own historic calls do the heavy lifting.

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Step 1

Pick a focused trial date and select your tools

Time box this activity to a maximum of one-hour per tool, 30 minutes if possible. If you can't instantly see value, then the tool hasn't worked.

Block out a Friday afternoon.

Select up to three tools to use to run your comparison and sign-up for them, prior to the trial window.

Please read the terms and conditions carefully to understand what happens to your data, where it's stored and whether it's used for cross-training LLMs.

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Step 2

Define what you want to learn

Choose the core question or topic you want to explore (example: top customer pain points, validation of a feature, common objections).

Decide who you want to share findings with (your team, exec, cross-functional leads).

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Step 3

Pick a focused trial date and select your tools

Pick around 10 call transcripts already collected (they can be from user interviews, sales calls, discovery sessions, etc).

Make sure they're in an accepted format (typically .txt, .docx, .pdf, or common transcript file types).

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Step 4

Upload transcripts to the tool and begin trial

Log in to the platform.
Find the “Upload Transcripts” or manual upload area in the product.

Drag-and-drop or select all 10 transcripts to upload in bulk.

Confirm completion; wait for the system to finish processing (should be quick).

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Step 5

Run topic and insight analysis

Generate topics to group your transcripts by themes.

Try asking the data specific questions you care about (e.g. "What are recurring objections?" or "Summarise onboarding feedback").

Quickly review the surfaced insights—look for relevance, actionability, and clarity.

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Step 6

Check and curate your results

Drill into insights to validate accuracy. Click on excerpts or timestamps to make sure context matches what's claimed.

If needed, tag key insights or highlight especially relevant findings for your review audience.

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Step 7

Synthesise, export and share

Export or use the reporting tools to generate a summary of top findings, topics, or quotes.

Create a shareable report or link, or download a presentation-friendly summary.

Optionally, invite team/executive viewers directly or send them the export / screenshots.

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Step 8

Quick feedback loop

Ask yourself: Did you find at least a couple of immediately actionable or share-worthy insights?

Can you confidently share your findings with your team or exec in the boardroom or over email?

In the longer-term will it integrate easily with your tech stack.

You're Done!

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Quick Feedback Loop

		TOOL 1	TOOL 2	TOOL 3
Criteria A	Did you find at least a couple of immediately actionable or share-worthy insights?			
Criteria B	Can you confidently share your findings with your team or exec in the boardroom or over email?			
Criteria C	In the longer-term will it integrate easily with your tech stack.			
Criteria D	short description of criteria D in your company			
Criteria E	short description of criteria E in your company			

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Deeper Feedback

Criteria A	Workflow Replication & Integration	Set-up the tool to mimic existing workflows. Test the integrations with tools like Salesforce, HubSpot, Zendesk, and product management platforms to see if the tools can fit into the tech stack and automate ingestion. Can the tool play well with required call recorders and CRM systems, sometimes uploading historical calls to validate coverage.
Criteria B	Insight & Accuracy Assessment	New users look for quick wins—they check if tooling surfaces relevant, actionable insights, and how well these insights map to their expectations. Check the accuracy and relevance of insights and compare them to your own notes or what's surfaced via competing solutions. Try specific features like topic generation, in-built GPT, and checking if summaries map back to actual calls (timestamp validation).
Criteria C	Team-Specific Use Case Coverage	Product discovery and research calls Product marketing workflows (testimonials, competitive intel, etc) Sales objection and trend analysis Using features like projects, tagging, and filters to segment by product, team, or project to see if it offers granular enough coverage for different business areas.
Criteria D	Volume & Pricing Alignment	Estimating how many hours or calls required, to see if the trial/projected plan will scale and evaluate the cost model against their meeting and team volume.
Criteria E	Collaboration & Sharing	How easy is it to collaborate, share insights, and synthesise findings for exec or cross-team consumption. The easy ways to present and share synthesised feedback.
Criteria F	Quality of Support/Responsiveness	Early in the trial, users with issues check how responsive the software's team is to questions.

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