Magic Notes **Powered by** beam

Magic Notes is a specialist tool for frontline workers to instantly create detailed assessments. It is created and operated by Beam, a leader in tech-enabled welfare services for local government, who have worked with over 100 Local Authorities across the UK. Magic Notes has been developed in collaboration with Beam's own team of frontline caseworkers and is designed to suit the unique workflows of frontline workers.

How it works

- Magic Notes is a web application that can be accessed from any device with a microphone, such as mobile phone, laptop or tablet. It can be used for both in-person and online conversations, online and offline.
- Frontline workers use the Magic Notes to record conversations. Magic Notes can work with different speakers, languages and accents.
- Once the conversation is complete, Magic Notes automatically generates a summary structured into a template accurately matching the reporting requirements of the organisation, capturing the discussion and actions. The summary is accompanied by a full conversation transcript and the recording.
- To ensure accuracy and human-in-the-loop, users are prompted to review and edit all summaries produced by Magic Notes either directly within the summary, or using AI via a chat interface within the tool. Common examples of changes are to the spelling of a name throughout the summary, to add more or less detail on a specific point, or to reformat the summary into a completely bespoke output.
- There is a citations feature which can be applied per template and which provides references throughout the summary
- Once users are happy with the summary, it can be copy & pasted into internal databases or case management systems. There is no need to manage complex integrations with existing systems, ensuring the 'human in the loop'.
- Users retain access to full conversation transcriptions and recordings as per their organisation's agreed retention policies.

Service Definition Document
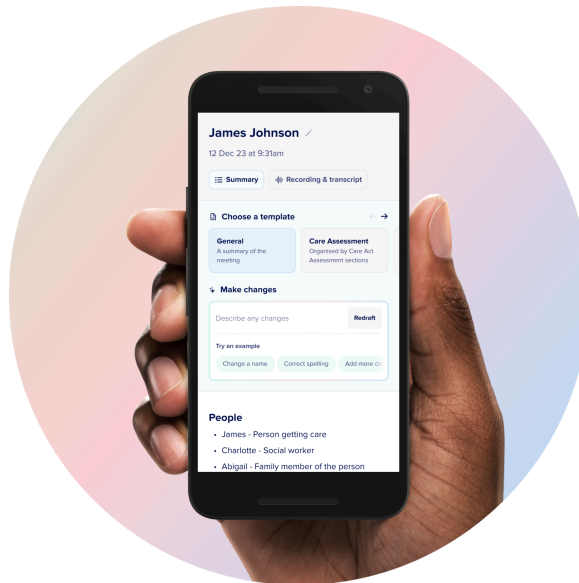
Benefits of Magic Notes

Magic Notes allows users to rapidly produce case notes and assessments, without compromising on quality. Benefits include:

- Reducing time spent on administrative work by an average of 8 hours per week.
- Enabling caseworkers to be more present during assessments by not having to focus on note taking.
- Templates are quality assured during development process to ensure compliance with different reporting requirements, e.g. CQC (Care Quality Commission).
- Increased accuracy in capturing all conversation details.

Onboarding

Magic Notes is an intuitive, easy-to-use tool accessible to users of all technical abilities. Beam provides an onboarding programme to all new customers as a part of implementation, but the product works out-of-the-box, ready for use from day one.

Magic Notes implementation includes dedicated group training sessions over a mobilisation period (usually 6-8 weeks) and 121 support as needed. Training sessions include:

- Best practice: trainers emphasise best practice, including consent and proper setup for audio capture
- Practical use training: logging in, making recordings and utilising pause, resume and save functionalities, ensuring correct meeting type selection for accurate summaries

- Customisation training: editing summaries, using AI for refinement, correcting errors and adjusting structure and style
- Manager training: ensuring team leaders understand Magic Notes, their access rights, and ability to review team usage.

All users will be provided with a training document and video covering set-up, FAQs, and basic troubleshooting. Additional support can be requested from within Magic Notes, through the "Get Support" feature or by emailing the Support team.

Detailed support and security information is included at the end of this document.

Magic Reports

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Magic Reports allows you to create high quality reports in minutes by combining various source materials such as documents, recordings and notes. Reports templates are fully customised and designed for frontline and statutory reports.

How it works

- Magic Reports is a web app that can be accessed from any internet-connected device such as laptop, desktop or tablet.
- Report templates are customised based on customer needs. Standard templates include ECHPs, DoLS Assessments, Children and Families Assessments, and Best Interests Assessments.
- Users select the Report template which they wish to populate, then add files which Reports will summarise. Source files can be uploaded files, pasted text or pulled from Magic Notes, with a range of supported file types including audio and video files. There is no limit to the number of source files uploaded.
- Users select "Create Report", and a draft report is created in their Magic Notes library. Users can use AI or manual edit functionality to make changes to the draft Report.
- Once users are happy with the Report, it can be copied and pasted into Case Management systems or other locations.
- Reports retain the original sources and users are able to run Source Checks on finalised and draft Reports. Users can add more sources over time to reflect the workflow of plans and assessments such as ECHPS.
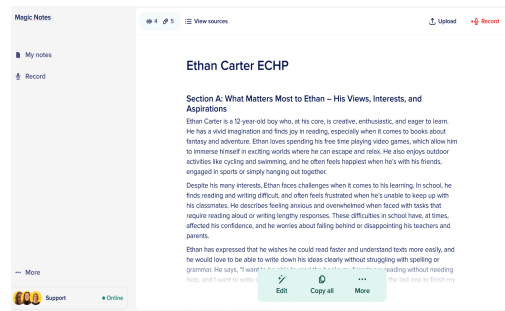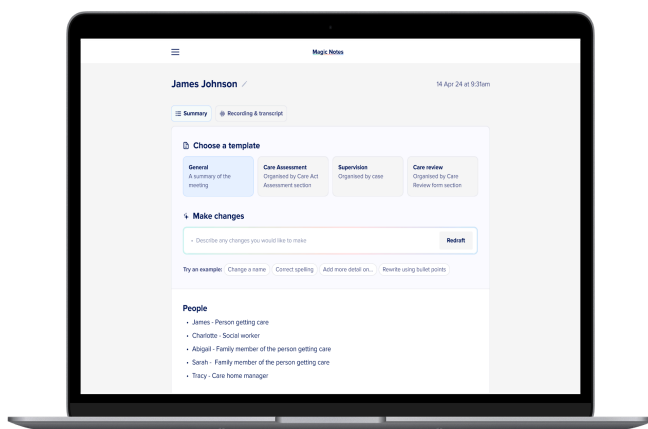
Benefits of Reports

- Consistent, quality reports
- Increase productivity and clear backlogs - users are able to complete 50%+ more Reports, meet statutory deadlines and clear backlogs by combining human expertise with AI power.
- Fully flexible Reports templates customised to customer requirements

Onboarding

Magic Reports is an intuitive, easy-to-use tool accessible to users of all technical abilities. Beam provides an onboarding programme to all new customers as a part of implementation, but the product works out-of-the-box, ready for use from day one.

Magic Reports implementation includes dedicated group training sessions over a mobilisation period (usually 4 weeks) and 121 support as needed. Training sessions include:

- Best practice: trainers emphasise best practice, including consent and proper setup for audio capture
- Customisation training: editing reports, using AI for refinement, correcting errors and adjusting structure and style
- Manager training: ensuring team leaders understand Magic Reports, their access rights, and ability to review team usage.

All users will be provided with a training document and video covering set-up, FAQs, and basic troubleshooting. Additional support can be requested from within Magic Reports, through the "Get Support" feature or by emailing the Service Desk.

Detailed support and security information is included at the end of this document.

Service Definition Document

SpeakAI **Powered by** **beam**

Speak AI is a specialist AI-powered virtual assistant designed for social care services. It works over phone or web chat, manages inbound contact from residents or clients, collecting or sharing info as needed, and triaging effectively, reducing the pressures on front door teams and contact centres.

Speak AI can be fully customised for each customer, including service information, phone call routing flow and tone of voice. Unlimited iterations are included as standard.

How it works

- Speak AI is a natural voice agent which provides information to callers tailored to local services, policies and processes.
- Speak AI integrates with organisation phone lines and website chat bots, automating routine enquiries and freeing up human staff from repetitive routine enquiries.
- Speak AI is informed by data taken from policies and processes uploaded during implementation and managed by customers.
- When customer calls are connected to Speak AI, it gathers information (including initial pre-assessments, screening questions) and triages customers to the right place, including smart escalation of safeguarding risks and urgent risks to human staff.
- To ensure human-in-the-loop, Speak AI creates a structured Magic Notes summary for every call, which is reviewed and logged by the required staff member.
- Speak AI retains a recording and summary of the conversation, which is stored within the Magic Notes web application.
- Speak AI works 24/7, in 30+ languages, over phone calls and web chat. Speak AI can handle all calls at the same time without timing out or needing to hang up, and is able to deal with high demand volumes of calls.

Benefits of Speak AI

- Consistent, quality advice to customers tailored to local services, policies and processes
- Customers get the care or support they need from council services more quickly
- No missed calls or calls waiting in queues
- Human expertise and resource used effectively for calls where it is needed most
- Detailed data capture from every call

Service Definition Document

Onboarding

Beam provides an onboarding programme to all new customers as a part of implementation, including support to develop the data library and customising the natural voice. The implementation period is on average 8 weeks and includes:

Pilot

- **Pre-work:** Beam can provide guidance on completing or updating your DPIA, aligning on the best service area for testing, and running initial demonstrations to key stakeholders.
- **Discovery:** get everything ready to launch live testing, including setting up key meetings, aligning on evaluation criteria and building the custom bot.
- **Initial Trial:** training the testing team and getting them set up if they do not already have Magic Notes accounts. Initial internal testing will run concurrently with phone line integration.
- **Formal Testing:** Practitioners use the tool for 4-6 weeks. The project team and practitioners meet weekly to discuss usage and feedback. Any emergency changes will be escalated and changed within 1 working day.
- **Evaluation:** collecting data and feedback from the testing team, and sharing a full report of the findings.

Subscription Pre-work: Beam can provide guidance on completing or updating your DPIA, aligning on the best service area for testing, and running initial demonstrations to key stakeholders.

- **Pre-work:** Beam can provide guidance on completing or updating your DPIA, aligning on the best service area for testing, and running initial demonstrations to key stakeholders.
- **Discovery:** get everything ready to launch live testing, including setting up key meetings, aligning on evaluation criteria and building the custom bot.
- **Initial Trial:** training the testing team and getting them set up if they do not already have Magic Notes accounts. Initial internal testing will run concurrently with phone line integration.
- **Go-Live:** Beam's Account Manager supervises rollout, with initial fortnightly monitoring calls. Monitoring calls move to monthly after 3 months.

Service Definition Document

All users will be provided with a training document and video covering set-up, FAQs, and basic troubleshooting. Additional support can be requested from within Magic Notes, through the "Get Support" feature or by emailing the Service Desk.

If customers have any serious technical issues with the bot, or any major identified issues with the service it is providing, this would be escalated immediately within Beam.

Detailed support and security information is available at the end of this document.

Beam Translate **Powered by** beam

Beam Translate is Beam's AI tool, available from early 2026.

Our real-time translation solution empowers frontline staff to deliver immediate, high-quality support to clients, regardless of the language they speak. The simple, push to talk model is purpose built for real world service delivery.

Pilot approach

Customers can purchase 12-week pilots of Beam Translate, which include:

- **Align** on use case/scenarios (including guardrails), languages, any safeguarding approaches
- **Train** staff on how to interact with the tool including use cases, guardrails and fallbacks
- **Test** for a minimum of 4 weeks with regular feedback sessions
- **Evaluate** usage, languages used, staff time saved, interpreter cost saved and quality of translations

Detailed support and security information is available at the end of this document.

Service Definition Document

Support - all Beam products (Magic Notes, Magic Reports, SpeakAI, Beam Translate)

Users have access to email and telephone support from the Beam Service Desk, available 9am-5pm UK time, Monday to Friday.

The support options available to users are:

- Live chat: integrated into Magic Notes platform, links users directly to a Beam customer support specialist via webchat, available 9am-5pm Monday to Friday
- Unlimited 121 support sessions, requested via webchat, email, online form or via Account Manager
- Email support: available 9am-5pm UK time, Monday to Friday at beam@magicnotes.ai
- Online support centre: a bank of support articles available 24/7, for self service
- User guides and FAQs: these are shared during onboarding and user training, and regularly updated as product changes are made.
- Join a group training or refresher session

Security and Privacy

As a social services provider, Beam has a deep understanding of the data protection requirements applied to special category data. Security and data protection are embedded in the foundations of Beam's AI product suite design, to ensure confidential conversations between caseworkers and clients remain secure. Measures include:

- All data is securely stored and processed in the UK or EEA.
- Beam is ISO270001 and Cyber Essentials Plus Certified and operates in strict compliance with UK GDPR.
- Data Protection Impact Assessments are co-created and signed off as part of any new partner onboarding.
- Customers retain complete control over their data and Beam does not use reports or source materials for any purpose without customer consent.
- There are two login options available:
  - Code: identified users enter their work email address and are sent an email with a code, which logs them in to Magic Notes.

Service Definition Document

- ○ Single Sign On (SSO) using Google Workspace or Azure Active Directory. SSO enables an option to enforce Multi Factor Authentication (MFA) via SMS, email or authenticator app.