AI Automation / CRM Automation

Convert call transcripts, meeting notes, and email threads into structured CRM activity logs — turns noise into signal.

Difficulty: Intermediate

Model: GPT-4 / Claude / Gemini

Use Case: Activity Capture, Note Taking, CRM Hygiene

Updated: May 2026

Why This Prompt Exists

Sales reps hate logging activities. It's tedious, repetitive, and takes time away from selling. So they don't do it — and the CRM becomes a graveyard of incomplete data.

You get:

- empty activity logs (no visibility into customer conversations)
- vague notes ("had a good call" — what does that mean?)
- missing next steps (deal stalls because no one knows what's due)
- no institutional memory (rep leaves, knowledge leaves with them)
- forecasting based on incomplete data (garbage in, garbage out)

But structured summaries capture value:

- key topics: what was discussed?
- decisions: what was agreed?
- action items: who does what by when?
- sentiment: how did the customer feel?
- next steps: what happens next?

Without summarization, customer intelligence dies in transcripts.

This prompt transforms raw conversation into structured CRM logs.

The Prompt

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Assume the role of a sales operations analyst who structures activity
logs.

Your task is to convert raw conversation into a structured CRM
activity summary.

Generate:

1. ACTIVITY METADATA
   - Type: [Call / Meeting / Email / Demo / Negotiation]
   - Date & Duration: [timestamp]
   - Participants: [list with roles]

2. KEY TOPICS COVERED
   - Topic 1: [summary of discussion]
   - Topic 2: [summary of discussion]
   - Topic 3: [summary of discussion]

3. CUSTOMER SENTIMENT
   - Overall: [Positive / Neutral / Negative / Mixed]
   - Evidence: [quote or observation]
   - Warning signs: [budget concerns, competitor mention, timeline
slip]

4. DECISIONS MADE
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- Decision 1: [what was agreed]
- Decision 2: [what was agreed]

5. ACTION ITEMS (with owners and due dates)

Action	Owner	Due Date	Priority
[task]	[person]	[date]	High/Med/Low

6. CUSTOMER QUESTIONS
   - Question 1: [question asked]
   - Question 2: [question asked]

7. NEXT STEPS
   - What happens next
   - When the next activity is scheduled

8. LOG READY FOR CRM
   - A 2-3 sentence summary suitable for CRM notes field

INPUTS:

Conversation transcript or notes:
[PASTE CALL TRANSCRIPT, MEETING NOTES, OR EMAIL THREAD]

Activity type:
[CALL / MEETING / EMAIL / DEMO / NEGOTIATION]

Participants (if known):

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[E.G., "John (AE), Sarah (Customer - Procurement Lead)"]

Customer stage:
[PROSPECT / ACTIVE NEGOTIATION / CUSTOMER / CHURN RISK]

RULES:
- Extract decisions explicitly — "we agreed" is valuable, "we
discussed" is not
- Action items without owners are not action items (flag as "needs
owner")
- Capture customer questions (unanswered questions are risks)
- Note sentiment changes (e.g., "started positive, ended concerned")
- Keep the final CRM log to 2-3 sentences (nobody reads long notes)
- Flag any mention of competitors or budget as high-priority signals
```

How To Use It

- Extract decisions explicitly — “we agreed to X” is valuable; “we discussed X” is not.
- Action items without owners are not action items (flag as “needs owner”).
- Capture customer questions — unanswered questions are risks.
- Note sentiment changes — “started positive, ended concerned” is critical context.
- Keep the final CRM log to 2-3 sentences — nobody reads long notes.
- Flag any mention of competitors or budget as high-priority signals for CRM-02.

Example Input

Conversation transcript:
“John: Thanks for the demo. I think the product fits our needs. Sarah: Great, what about pricing? John: We need to stay under $50k. We’re looking at Competitor X but they’re more expensive. Sarah: I can send you a proposal by Friday. Also, can you connect me with your security team? John: Yes, I’ll set that up. Let’s talk next Tuesday to review.”

Activity type:
"CALL"

Participants:
"John (AE), Sarah (Customer – Procurement Lead)"

Customer stage:
"ACTIVE NEGOTIATION"

Why It Works
Most CRMs have a "notes" field that becomes a dumping ground — long, unstructured, and unusable for analysis.

This framework improves outcomes by forcing:

- key topic extraction (what was actually discussed?)
- sentiment analysis (how did the customer feel?)
- decision capture (what was agreed?)
- action item extraction (who does what by when?)
- next step specification (what happens next?)

Failure modes this prevents:

- Vague notes — "good call" tells you nothing
- Missing action items — deals stall because no one knows what's due
- Lost institutional knowledge — rep leaves, context leaves
- Unanswered questions — customer asked, no follow-up

This improves on: Free-text CRM notes that are never read. Structured summaries are searchable, reportable, and actionable.

Related to: CRM-04 (Intent Tagger) for classification; CRM-02 (Health Scanner) for risk signals.

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See also Lead Router Classifier