AI Meeting → CRM Agent

Listens to your sales calls and meetings, then automatically writes the notes, extracts action items, and updates your CRM — so nothing gets forgotten.

Automatic Call Notes | CRM Auto-Update | Action Item Extraction

THE CHALLENGE & THE FIX

What Meeting → CRM Agent Actually Does

This automation turns every sales call or client meeting into structured CRM data, automatically, with no one typing notes afterward.

The Problem Today

- Reps forget to log call notes, so CRM data quietly goes stale
- Important details and commitments get lost the moment a call ends
- Writing up meeting summaries eats directly into selling time
- Managers lack real visibility into what was actually discussed on calls

The Agentra Fix

- AI transcribes and summarizes every sales call or meeting automatically
- Extracts key details, objections, and next steps without manual note-taking
- Updates CRM fields and creates follow-up tasks automatically
- Gives managers a clean summary without needing to listen to full recordings

As soon as a call or meeting ends, the recording is transcribed and analyzed by AI, which pulls out the details that actually matter: what was discussed, objections raised, budget or timeline mentioned, decisions made, and clear next steps. That information is written directly into the CRM record for that contact, and any commitments made on the call, such as 'I'll send you a proposal by Friday,' are turned into actual follow-up tasks with due dates.

STEP-BY-STEP AUTOMATION FLOW

How It Works

From a recorded conversation to an updated CRM record and a follow-up task list, automatically.

1

Call/Meeting Recorded

The sales call or client meeting is captured via the video platform or dial-in recording.

2

AI Transcription

The full conversation is transcribed accurately, including speaker separation.

3

Key Detail Extraction

AI pulls out topics discussed, objections, budget and timeline mentions, and decisions made.

4

Action Items Identified

Any commitment or next step mentioned on the call is captured as a discrete task.

5

CRM Auto-Update

The contact or deal record is automatically updated with the summary and key fields.

6

Task & Reminder Creation

Follow-up tasks are created and assigned with due dates, so nothing gets forgotten.

THE INTELLIGENCE LAYER

Under the Hood

How the AI actually thinks, decides and acts inside this automation.

Transcription is handled by a speech-to-text model tuned for multi-speaker conversations, which separates who said what, critical for accurately attributing a prospect's stated budget or objection versus the rep's response. The transcript is then passed to a language model prompted specifically to extract sales-relevant structure: pain points mentioned, objections raised, competitors referenced, and any numbers, such as budget, timeline, or headcount, that came up.

Rather than dumping a wall of transcript text into the CRM, the automation writes a short, scannable summary into the relevant deal or contact fields, and separately creates individual, dated tasks for every commitment identified, so a rep's promise to 'follow up next Tuesday' becomes an actual task assigned to them with a due date, not a sentence buried in a paragraph no one re-reads.

TECH STACK

n8n Workflow Engine
Connects the call recording, transcription and CRM update

Speech-to-Text Model
Transcribes the call with accurate speaker separation

GPT Language Model
Extracts summary, objections and action items from the transcript

CRM API (HubSpot/Salesforce)
Writes the summary and updates deal fields automatically

Task Manager Integration
Creates and assigns follow-up tasks with due dates

INTEGRATES WITH

Zoom · Google Meet · HubSpot · Salesforce · Slack · Asana

WHY IT MATTERS

Key Benefits

Every conversation becomes usable data, automatically.

Zero Manual Note-Taking

Reps focus on the conversation, not on writing it up afterward.

Always Up-To-Date CRM

Every call automatically enriches the contact or deal record.

Nothing Falls Through The Cracks

Every promised next step becomes a tracked, assigned task.

Manager Visibility Without Micromanaging

Leaders see clear call summaries without needing to listen to recordings.

Better Deal Intelligence

Objections and buying signals are captured consistently across every call.

Saves Hours Per Rep Per Week

Time previously spent on write-ups goes back into selling.

REAL-WORLD EXAMPLE

A B2B software sales team runs 25 discovery calls a week across the team. After each call ends, the automation transcribes it, updates the CRM deal with a summary of the prospect's stated budget and timeline, and creates a task for the rep to send a proposal by the date they promised on the call. Sales managers now review a five-line AI summary per call instead of skimming full transcripts or relying on reps to remember to log notes.

IDEAL FOR

- B2B Sales Teams
- SaaS Companies
- Agencies
- Consulting Firms
- Real Estate Teams