AI Sales Call Summarizer: Business Case & Technical Overview

# Business Case & Problem We’re Solving

Sales representatives today dedicate far too little time actually selling. According to a Salesforce analysis in 2023, reps only devote 28% of their work to customer communication. Administrative activities such as logging CRMs, summarizing calls, and following up usually devour the remainder. These low leverage activities not only waste time but also create friction that causes lost deals.  
  
The root cause is evident:  
  
Although sales discussions are worthwhile, the observations from those talks are locked in reps memory and call logs.  
This results in:  
  
Incomplete CRM entries  
  
General, slow follow-up emails  
  
Managers not seeing deals  
  
Failed follow-ups caused by human error  
  
The difficulties are pretty common. According to Forrester, 2022, 74% of B2B sales reps claim they have lost transactions as a result of delayed follow-up or inadequate documentation. That's the issue we set out to address.

# What Our Prototype Does (as of now)

Our current prototype turns a raw sales call into structured CRM data and a follow-up email with almost no manual work:

1. A sales rep uploads a recorded call (or pastes a transcript)
2. The system:
   * Transcribes the audio using OpenAI Whisper which takes the audio and turns it into a string which can later be processed by our system
   * Extracts key information (pain points, objections, next steps), sets its into a hardcoded predesigned template and feeds it to our integrated LLM as a prompt
   * Writes a personalized follow-up email
   * Creates a contact in HubSpot (if missing) and attaches a JSON summary as a CRM note

**Reps can go from raw audio to CRM-ready summary + email in under a minute.**

# How This Fits Into Real Workflows

This solution is designed to integrate seamlessly into existing sales workflows. It could be triggered:

* With a single click after a Zoom, Meet, or Gong call
* Automatically from call logs or calendars

Reps save time, managers gain visibility, and CRMs stay up-to-date—without anyone having to do extra work.

# Revenue Impact

This tool increases:

* **Rep productivity** — by reducing manual entry
* **Follow-up speed and personalization** — boosting close rates
* **CRM data completeness** — enabling better forecasting

Even a 10% increase in efficiency across a 10-rep team could unlock $100K+ in addi- tional pipeline per quarter, depending on deal size and sales cycle.