

◆ OPEN-SOURCE AI PLAYBOOK · FOR SALES

CRM Autopilot

Your CRM is always out of date because nobody wants to type up their calls.

THE SYSTEM

Reads every call and email, then updates deals, contacts and next steps for the rep to confirm.

🕒 BUILD TIME

2-3 days

🔧 HOW IT'S BUILT

No-code

🔌 WORKS WITH

HubSpot or Salesforce
+ Zoom or Meet

👤 OWNER

RevOps or sales ops
lead

How it works: after every call, a diff of the deal to confirm

Deal · Northgate Dental Partners
Scheduling rollout
+7 -4

From the Oct 20 call and one email · Last updated Sep 2

Stage	– Discovery + Proposal	✓ ↺ 3
Amount	– \$48,000 · 5 clinics + \$28,800 · 3 clinics to start ⚠ Down 40%. Worth a look before you confirm.	✓ ↺ 1
Close date	– Dec 15, 2026 + Nov 30, 2026	✓ ↺ 2
Next step	– Send demo recording + Send the pilot proposal for 3 clinics by Oct 23	✓ ↺ 3
Contacts	+ Raj Menon, IT Manager · joined the call	✓ ↺ 4
Risks	+ IT security review needed before signing	✓ ↺ 4
Competitor	+ Quote from their current vendor	✓ ↺ 5

🔒 Unchanged: Owner, Products, Decision-maker, Territory

WHERE EACH CHANGE CAME FROM

1
Call · 12:40 · Ana Duarte, COO

“Let’s start with the three Denver clinics and add the other two in the spring.”

2
Call · 18:05 · Ana Duarte, COO

“If we sign by the end of November, can you have us live before January?”

3
Call · 24:30 · Jordan Lee, your rep

“I’ll send the pilot proposal over by Friday.”

4
Call · 27:10 · Raj Menon, IT Manager

“I’ll need your security questionnaire before anything gets signed.”

5
Email · Oct 21 · Ana Duarte, COO

“Full disclosure, we’re also getting a quote from our current vendor for their upgrade.”

The rep confirms or undoes each change.
Nothing that changes the forecast is saved until they do.

✓ Confirm 7 changes

Sample record, fictional company, people and figures.

Who decides what



Saved on its own

Low-risk records of what happened.

- ◆ The call summary and a link to the recording
- ◆ Emails logged to the right deal and contact
- ◆ The meeting marked as held



Waits for the rep

Anything that changes the forecast or the plan.

- ◆ Stage, amount and close date
- ◆ Next steps and follow-up tasks
- ◆ New contacts and their roles
- ◆ Risks and competitors



Never touched

Left to people, always.

- ◆ Marking a deal won or lost
- ◆ The deal owner and territory
- ◆ Deleting or merging records
- ◆ Deals the rep doesn't own

You set the rules per field. Most teams start strict and loosen them once reps stop undoing changes.

Can we build it? FOR YOUR TECH LEAD



Tools you'll use

Call recordings and transcripts	Zoom or Google Meet transcripts (paid plans)	or Fathom, Fireflies, Gong
Email	Gmail or Outlook	or Inbox sync built into the CRM
Reading the call and drafting changes	Claude	or ChatGPT, Gemini
Running the steps	n8n	or Make, Zapier
Where the changes land	HubSpot or Salesforce	or Pipedrive, Attio
Where the rep confirms	A Slack message with buttons	or A Teams card, a task in the CRM



Three ways to build it

Start simple 1 day

A saved Claude or ChatGPT prompt: the rep pastes in the transcript and gets the field changes, with quotes, to copy into the CRM.

Production 2-3 days

n8n picks up each transcript and email, matches it to the deal, drafts the changes and asks the rep in Slack. Confirmed changes are written to the CRM.

Custom 1-2 weeks

Adds rules per field and deal stage, a weekly summary of what changed across the pipeline, and tracks which changes reps undo.



Access it needs

- ◆ Read access to call transcripts, and to email threads with customer domains only
- ◆ Write access to deals, contacts, tasks and notes through the CRM's API
- ◆ A Slack or Teams app to send each rep their confirm message



Guardrails

- ◆ Nothing that changes the forecast is saved until the rep confirms it
- ◆ Every change links to the line it came from
- ◆ Never marks a deal won or lost, changes the owner or deletes a record
- ◆ Big swings in amount or close date are flagged
- ◆ Internal and personal email is skipped



What to measure

- ◆ Days since each open deal was last updated
- ◆ Share of calls with notes on the record the same day
- ◆ Share of proposed changes confirmed, not undone
- ◆ Time reps spend on CRM admin each week



Who builds and runs it

The RevOps or sales ops person who owns the CRM fields can build it in two to three days with n8n. After that they check the undo rate each month and adjust the rules. Reps just confirm.



◆ FREE, OPEN SOURCE, NO SIGN-UP

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

START HERE

01 Company Brain

FOR EVERY TEAM

02 Meeting-to-Action

03 Instant Customer Answers

FOR MARKETING

04 Static Ad Creative System

05 Content Engine

06 Competitor Watch

07 Campaign Performance Report

FOR SALES

08 Speed-to-Lead Responder

09 Account Research & Outreach

10 **CRM Autopilot**

11 Proposal Builder

12 Pipeline Review Prep

FOR LEADERS

13 Automated Morning Brief

14 Weekly Business Review

15 Board & Investor Update

FOR OPS, FINANCE AND HR

16 Sales-to-Delivery Handoff

17 Invoice & Collections Chaser

18 Candidate Shortlist System

19 Contract Risk Review

20 New-Hire Onboarding

WANT HELP BUILDING IT?

We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.

**Pallav Kaushish**

Co-Founder, AIXGrowth

Free 30-minute call · No commitment

[Book a Strategy Call →](#)