

Automation · Service guide

Call & Meeting Notes to CRM

Sales calls summarised, with next steps logged.

After a sales call or meeting, a short summary with agreed next steps is saved against the right contact in your CRM.

Message only

How it works	Written summary in your CRM
Best for	Solar, Real Estate Agents, Real Estate Teams
You stay in control	You choose which calls are summarised
First step	A short call with no obligation

How this helps

What it means for your business

Details from sales calls get lost before they ever reach the CRM.

Repetitive reading, sorting and writing is prepared for you, so your team starts from a draft instead of a blank page. You check the work before it is used.

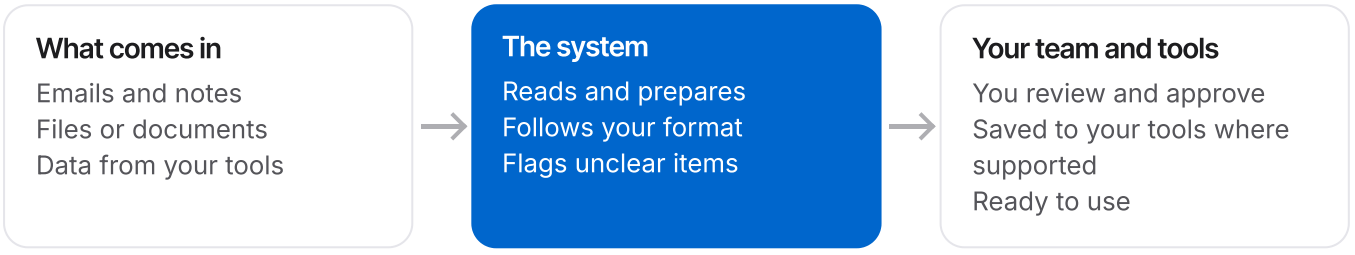
What you get

- Fewer lost notes and forgotten promises
- Everyone on the team can see what was agreed
- Follow-up reminders go out on time
- Less admin after every call

What changes day to day

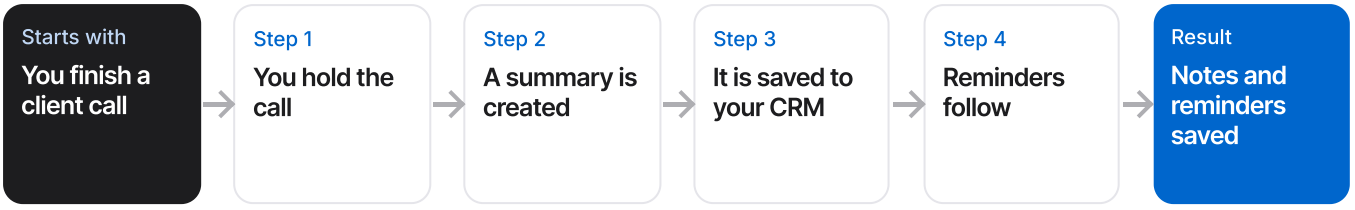
	Common today	With this service
Starting point	A blank page	A prepared draft
Format	Varies by person	Follows the format you set
Unclear items	Easy to miss	Flagged for a person to check
Your time	Spent on repetitive work	Spent on review and decisions
Final say	Your team	Still your team

How it fits with your business



How it works

From start to finish



Step 1
You hold the call
On Zoom, Google Meet or phone.

Step 2
A summary is created
Key points, decisions and next steps.

Step 3
It is saved to your CRM
On the right contact, with tasks and dates.

Step 4
Reminders follow
So the next step actually happens.

Example · Work scene

Your salesperson finishes a call with Rachel. You choose which calls are recorded, and the other person is told.

Written summary in your CRM

What happens next

The summary and next steps are saved against the right contact.

Call summary

Contact	Rachel Kim, Northside Realty
Discussed	Listing a 3-bed home in April, price expectations, staging
Next step	Send comparable sales by Friday
Follow-up	Call again Tuesday 10:00
Saved to	Contact record in your CRM

How easy it is

We do the heavy lifting

Most of the work happens on our side. You make the decisions, and we tell you exactly what we need.

What we handle

- Agree the format with you
- Connect your tools where supported
- Set the rules and the review step
- Test it on real examples
- Adjust the results after launch

What you do

- Share your rules and examples
- Approve the format
- Review the first results
- Tell us what to change

Service levels

Start simple, go further when you are ready

Level 1

Draft mode

We prepare the work and you approve it before it is used.

Level 2

Connected

Runs with your tools where supported, on the schedule you set.

Level 3

Advanced

More rules, several workflows working together, and reporting.

The right level is confirmed during discovery, based on your business and the tools you use.

What we need from you

- Examples of how the work is done today
- Access to the tools it needs to work with
- The format you want the result in
- Who on your team approves it

How we get started

1. A short call about your business
2. A clear plan and scope
3. Setup and testing with you
4. Go live with your approval

Why Calvyrn

Why businesses choose to work with us

Built for your business
Your rules, your wording and your tools. Not a one-size template.

You approve first
Nothing goes live until you have seen it and said yes.

Start small
Begin with one service or one first version, then add more if it helps.

One team
AI systems, automations, websites and web applications in one place.

Plain language
You always know what is being built, why, and what comes next.

Honest limits
We tell you what a system cannot do and where a person should stay involved.

You stay in control

- You choose which calls are summarised
- The other person is told when a call is recorded
- You can edit any summary

Questions you may have

Does it phone anyone?
No. It works from calls your own team makes, and it never phones anyone.

How long does it take to set up?
Most automations are live within one to two weeks of receiving what we need from you.

Do I need to change the tools I use?
Usually not. We work with the tools you already have wherever possible, and confirm this on our first call.

What if I want to stop?
Plans are month to month. You can pause or stop any automation.

Important notes

- Examples in this guide use fictional businesses, names and details.
- Results depend on your business, tools, customers and how the service is set up. We do not guarantee revenue, bookings or search rankings.
- AI can make mistakes. That is why approvals, clear limits and human hand-off are part of the setup.
- Features depend on your plan and on the tools you use. The final scope is confirmed during discovery and in your proposal.
- This guide is not legal, medical, tax or financial advice.

See how it would work for you
Tell us about your business. There is no obligation.

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