Discovery call to CRM action

Service offer brief | Proposed quick-win sprint | Updated 30 October 2026

This offer turns one type of discovery call into evidence-linked qualification proposals and an assigned follow-up in the client's existing CRM. Reviewers can inspect, accept, correct or reject each proposal before an approved update is committed.

Positioning: Turn discovery-call evidence into reviewed qualification updates and an assigned next action in your existing CRM.

Headline: Put discovery-call evidence into the next sales action.

Entry CTA: Review one discovery-call-to-CRM workflow with Hamid.

First workflow

The entry sprint covers discovery-call qualification against one rubric. Return field proposals with supporting excerpts or timestamps, unknowns and review status, then stage one assigned follow-up. Candidate interviews, renewal and expansion reviews, health scoring and broad historical mining require separate rubrics and scopes.

Proposed quick-win package

Included	Proposed boundary
Delivery	A 10-working-day build sprint after the readiness check. Confirm the completion date and review points before kickoff.
Population	Up to 30 transcripts in one language across evaluation and the initial live test. Agree a duration limit per transcript and set aside examples before tuning.
Connections	One transcript source, one CRM, one account or opportunity mapping, up to five qualification fields and one follow-up task type.
Review	One agreed sample, one consolidated refinement round and one documented release or keep-the-baseline decision.
Observation	A separate 30-calendar-day observation window after release. The client operates observation unless ongoing support is contracted.

These are proposed package limits confirmed after reviewing access, data quality and the receiving owner's capacity. Missing access or changed requirements require a revised scope and date. Additional records, integrations, variants and review rounds are scoped separately.

Buyer and qualification

The buyer is a RevOps leader, Sales Enablement owner or recruitment commercial operations lead. A sales manager supplies domain judgment; the CRM owner controls record updates. Useful triggers include inconsistent discovery qualification, repeated manual call review and follow-up that never reaches an accountable owner.

A suitable client has access to permitted transcripts, a reliable account or opportunity mapping, explicit field definitions and a reviewer who can judge extraction quality. Check the current call platform and CRM capabilities first so the service addresses a real unresolved workflow.

Qualify out projects with no stable definition of a correct output, poor account matching or no owner for the proposed action. A transcript can support an observation without proving intent, authority or a future buying decision. Preserve uncertainty instead of forcing every field to contain an answer.

This fits SaaS discovery calls and recruitment firms' new-client briefing calls when the fields, account mapping and reviewer are defined. It does not bundle candidate interviews into the discovery-call package. Check what the existing call platform and CRM already handle before selecting an unresolved workflow.

Before kickoff, provide permitted transcripts, account or opportunity identifiers, up to five field definitions, a named sales reviewer and the CRM field owner. Agree the language, transcript-length limit and held-out examples.

How we work together and fees

Hamid leads design, build and testing in Clay and your existing stack. Your Sales and RevOps subject experts supply business context, review examples and validate results; system owners provide access and support connections. Agree participation for each stage before kickoff. The CRM remains authoritative for its assigned commercial fields.

Quote a fixed service fee after the readiness check and before kickoff. The client provides and pays for all required software, licenses, workspaces and usage, including Clay and connected tools. Software costs and any media spend are separate from service fees.

The client owns the workspace, connected accounts, relevant code, configuration, evidence mappings and operating records. Include practical operator instructions. Optional Clay or practical training, ongoing operation, campaign sending, media buying and additional plays require an agreed scope.

The build includes the relevant slice of GTM Ontology: the client's structured business knowledge base of ICP, playbooks, messaging, relevant competitor context and win/loss lessons. This sprint captures qualification definitions, approved evidence examples and reviewed objections. GTM Ontology is Traffic Architect's delivery approach, not a native Clay feature.

Acceptance checks

The held-out calls meet the quality thresholds agreed by field type before evaluation. Proposed values carry source evidence and dates; missing evidence returns unknown and contradictions remain visible. Test wrong account mapping, an older call, a hypothetical budget statement, duplicate input and a failed write. Preserve human-controlled and later confirmed CRM values. The owner can approve, correct and reverse an update and restore the previous configuration.

Agree quality thresholds from the baseline before release. Judge the delivered workflow and review results separately from later commercial outcomes.

Proposed pilot

Use the package limits above for historical replay and the initial live test. Deliver the workflow within the agreed build sprint, then observe the released cohort for 30 calendar days. The client operates that period unless support is contracted; commercial progression may take longer.

1. Define each target field or action. Specify what counts as supporting evidence, acceptable inference, contradiction and insufficient information. Record which fields must stay under human control.
2. Map calls to the correct account, opportunity and time period. Preserve source identifiers and timestamps; quarantine uncertain matches instead of updating a plausible record.
3. Build a reviewed evaluation set spanning straightforward, ambiguous and negative examples. Keep a separate holdout set for judging the final rules rather than tuning on every example.
4. Extract structured values with a source excerpt or timestamp, the conversation date and an evidence status. Explicitly return unknown when the material does not support a conclusion.
5. Review proposed updates against existing CRM values. Respect field ownership, distinguish historical from current evidence and avoid overwriting a later confirmed value with an older call.
6. Stage updates and next actions for the responsible reviewer. Log approvals, corrections and rejections before enabling any routine automation on accepted field types.
7. Monitor errors and action completion. Re-evaluate when the transcript provider, rubric or model changes, and retain a rollback path for incorrect updates.

Deliverables

The client receives a field or action rubric, a labelled evaluation set, an evidence-linked output schema, reviewed workflow results, an update policy and a correction log. The handover identifies who owns the source connection, who reviews exceptions and who can change the rubric.

The learning package adds a feedback queue, evaluation scorecard, approved change history and an operator review guide.

Discovery questions

- Which account decision repeatedly requires someone to reopen a transcript?
- What exact field or action should change, and who defines a correct result?
- What does the current call or CRM tool already automate successfully?
- How should conflicting statements across calls be resolved?
- Who reviews uncertain outputs and can reverse an incorrect update?

What success means

Measure	Definition
Evidence support	Proposed non-empty values supported by the cited source, judged on a reviewed sample.
Unsupported claim rate	Claims lacking adequate evidence divided by reviewed claims; report by field type and severity.
Extraction coverage	Relevant facts correctly captured divided by facts annotated in the evaluation set.
Reviewer acceptance	Proposed updates accepted without material correction divided by updates reviewed.
Record and update accuracy	Correct account mapping and preservation of field ownership, timestamps and later confirmed values.
Operating outcome	Review or preparation time, completed actions and useful account decisions; commercial impact observed separately.

Measure the handling of unknowns and contradictions alongside completeness. Filling every field can reduce quality if the conversation never covered the subject. Define denominators by claim, field, call or account rather than blending them into one accuracy score.

Decision to expand

Expand when the held-out examples meet the agreed quality criteria, reviewers can inspect the evidence quickly and proposed actions have accountable owners. Restrict or redesign field types that repeatedly produce unsupported conclusions or expensive corrections.

Set thresholds with the business owner before the evaluation. Compare time saved after accounting for review and error correction. A customer-retention improvement observed after deployment is not automatically caused by transcript processing; usage, account management and other changes also matter.

Published evidence and its limits

Clay's AlertMedia case study describes extracting MEDDPICC qualification from Gong transcripts with supporting evidence, updating Salesforce and having reps review the results. This supports the workflow pattern. The proposed sprint uses the client's own rubric, bounded evaluation and review policy.

This vendor-published example describes AlertMedia's implementation and outcomes. It is not a Traffic Architect result or a promise of accurate extraction from every call. Confirm current source access, connector support and update permissions in the client workspace before commitment.

Proof to show

Show a scored evaluation set containing supported extractions, missed facts, unsupported claims and appropriate unknowns. Compare review time after including correction effort. Start with one unresolved qualification workflow before adding more call types.

Self-learning with a human in the loop

Reviewed corrections and measured outcomes inform proposed improvements to this workflow. Test and approve a change before releasing it.

Learning updates rules, scoring, prompts and approved examples; it does not promise automatic model retraining or guaranteed uplift. Keep client feedback within its agreed data boundary.

What this offer learns

Decision area	Feedback captured	Approved refinement
Extraction and evidence	Reviewers correct fields, source excerpts and unsupported conclusions.	Refine field prompts, evidence rules and approved reference examples.
Unknowns and contradictions	Reviewers label missing evidence, conflicting statements and stale information.	Improve abstention and timestamp handling; completeness never overrides evidence.
Action usefulness	Account owners accept, edit or reject recommended actions.	Refine action criteria and ownership without treating completion as proof that the inference was correct.

Review and release

1. Name a Sales domain reviewer and the RevOps field owner. Log record ID, source/version, decision, correction, reason, reviewer and time. Separate later outcomes from review labels.
2. Review the agreed sample during the build, covering accepted, rejected, unresolved and unselected records. Agree the client's observation cadence at handover. No response means unknown, not rejection.
3. Test a versioned change against baseline on examples withheld from tuning. Refresh evaluation samples; inspect errors, coverage and acceptance. Sparse feedback can justify no change.
4. The named owner approves a limited release. Monitor regressions and retain rollback. Preserve permissions, exclusions and human-controlled fields.

Delivery and evidence of improvement

Include a feedback queue, labelled examples, review guide, evaluation scorecard, change log and rollback procedure. Measure unsupported-claim rate, missed annotated facts, acceptance without correction and net review time; split results by field type. Record cohort size and version; association does not prove incremental revenue.

Example learning cycle: Reviewers flag hypothetical budget statements as confirmed budget. Add approved counterexamples, then evaluate on unseen calls before releasing the prompt change. Preserve later confirmed CRM values.

The build includes one consolidated refinement round and one documented release or keep-the-baseline decision. After handover, the client runs the agreed observation and feedback reviews. Further engineering changes or managed operation require separately agreed support and capacity.

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