

AGENT INSIGHTS

# From Conversation to CRM in One Click

Agent Insights automatically transcribes, summarizes, and analyzes every call and sends it straight to your CRM. Your agents stay focused on the customer while AI takes care of the rest.



## Built-in AI

Get call recording, transcription, Generative AI summarization and sentiment directly in your agent interface.



## One-click send to CRM

Make your CRM the single source of truth. Share conversations, summaries and sentiment for every interaction.



## Relevant insights

Start instantly with pre-built AI summary prompts or customize them for your organization or desk.

**AI WRAP-UP**

**Transcript**

00:00:19 **Agent:** IT service desk, this is Alex. How can I help you today?

00:00:26 **Caller:** Hi Alex. This is Dana from Finance. My laptop keeps freezing and I can barely work.

00:00:35 **Agent:** Hi Dana. Sorry to hear that. We will check it together. Have you already opened a ticket or is this the first time you are calling?

00:00:42 **Caller:** I opened a ticket a few days ago, but it got worse today so I decided to call.

00:00:50 **Agent:** OK, let me find your ticket. Can I have your username or email?

00:00:55 **Caller:** Sure. It is Dana.levi@shippservice.com

**Summary**

**Executive summary**

Caller contacted IT about frequent laptop freezes impacting daily work, mainly during Teams meetings. Agent verified device age and performance issues and decided that further troubleshooting is not effective. Agent approved a laptop replacement and aligned with caller on shipping and return process.

**Call highlights**

- Device. Lenovo T480 from 2019 with 8 GB RAM used by caller in Finance.
- Issue. Laptop freezes 4 to 5 times per day, often during Teams meetings and screen sharing, no blue screen.
- Impact. Multiple forced restarts daily and disruptions in business meetings.
- Technical findings. High CPU and memory usage under normal workload. Previous fixes did not solve the problem.

**Sentiment**

Positive

Exit and send to CRM

## Connects to **Any CRM**



Plus any CRM with APIs



# Your Workflow. Your Summary.

Use pre-built industry prompts or customize your own.



## Quality Monitoring

Evaluate agent adherence to the standards you set, get explanations of what happened and surface coaching opportunities.



## Customer Loyalty

Instantly identify what's driving satisfaction or frustration, flag competitor mentions and spot early churn signals.



## Department-specific

Customize summaries by desk-incident details for IT, application status for Admissions, objections handled for Sales.

PROMPT SUMMARY CRM

**INPUT**  
**Custom Prompt**

Analyze this customer call and return:

- Customer sentiment score
- Key moments affecting sentiment
- Talk-to-listen ratio
- 3 bullet points explaining the score
- Flag if follow-up is required

**OUTPUT**  
**AI Summary**

CUSTOMER SENTIMENT • Negative

**KEY MOMENTS**

**01:12 Frustrated with delivery delay**  
*"I've been waiting three weeks — this is unacceptable."*

**03:21 Concern about pricing change**  
*"No one told me the price went up — I feel misled."*

**05:40 Issue partially resolved**  
*"OK, that helps a little, but I still want to hear back."*

**TALK VS. LISTEN**

AGENT	CUSTOMER
<b>62%</b>	<b>38%</b>

**RECOMMENDED ACTION**  
Follow-up call suggested ✓ Send to CRM

Loved by Customer Service Teams.

Trusted by IT.



ATENTO:

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