

The CRM updates itself between calls

Claude sits between the dialer and the CRM. Calls, emails, and forwarded threads land as clean records the same minute, and the weekly maintenance sweep arrives with the fixes already drafted.

SECTOR	Commercial brokerage, outbound and pipeline
ENGAGEMENT	CRM and dialer automation, live deployment
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01 The problem with a CRM nobody feeds

Every brokerage buys a CRM and every brokerage ends up with the same thing: a system that is only as accurate as what a broker remembers to type after a call. The dialer knows a call happened. The CRM does not know what was said, whether the deal moved, or what the next step is, because that part depends on a person sitting down at the end of a day in the field and doing data entry.

So the record decays. Stages sit where they were two months ago, next steps live in a notebook, the same owner gets called twice by two brokers, and the Monday pipeline review runs on memory rather than on what is in the system. The cost is not the typing. It is the deals that go quiet because nobody could see that they had.

“The CRM was a place we went to find out how out of date the CRM was.”

Principal, commercial brokerage

CALL LOGGED AFTER THE CALL

Same minute

was end of week, or never

RECORDS MAINTAINED
WITHOUT A BROKER TYPING

**Every dialed and
emailed contact**

PIPELINE REVIEW PREP

Minutes

was a day of cleanup

02 What we built

Claude sits between the phone system and the CRM as the layer that does the writing. A call ends and the disposition, duration, and recording flow through. Claude writes the note in the office's own language, updates the contact, moves the stage on what was actually said, sets the next step with a date, and stages anything ambiguous for a person rather than guessing. Forwarded email threads go through the same door.

	BEFORE	AFTER
Call notes	Typed from memory hours later, when they got typed	Written the minute the call ends, staged for review
Deal stage	Moved when someone remembered to move it	Moves on the signal in the call or the thread
Next step	Lived in a broker's head or a notebook	On the record, with the follow up queued
Duplicates and stale records	Found by accident during a quarterly cleanup	Surfaced weekly with a proposed fix
Monday morning	Reading the CRM to work out what happened	A 7am digest of what moved and what needs attention

How it unfolded

WEEK 1	Define a good record What a complete contact and deal look like here, what each stage means, and what counts as a real next step. Automation on top of vague definitions just produces wrong data faster.
WEEK 2	Wire the dialer Call outcomes flow to Claude, which drafts the note, updates the fields, and writes back under guard rails. Brokers keep calling the way they already do.
WEEK 3	Add the inbox Forwarded threads and replies parse into the same records, so a deal that moves by email shows up like one that moves by phone.
WEEK 4 ON	Maintenance on a schedule A weekly sweep for stale, duplicate, and half filled records comes back as proposed fixes to approve. The morning digest runs every day.

03 Guard rails, and what stays human

The rule we hold to is that nothing irreversible happens quietly. Routine logging writes itself, because a call note nobody reads is not a decision. Anything that deletes a record, merges two companies, suppresses a contact, or sends something to a client gets named to a person first. Uniqueness rules stay on, so a duplicate is treated as the system working rather than an obstacle to route around.

What stayed human

The call, the read on the person, what a deal is really worth, and when it is dead. Brokers stopped doing data entry. They did not stop owning the relationship, and no client ever hears from the automation.

What we will not show you

The stage definitions, the qualification logic, and the rules for what a next step has to look like before it counts. That framework is the office's own and it stays theirs. What carries across engagements is the plumbing, not the playbook.

Why it holds up

The platform layer is deliberately replaceable. The data, the definitions, and the workflow rules are the asset, and they carry across whatever CRM or dialer the office ends up running. When a tool changes, the wiring gets rebuilt and the operating standard survives it.

Anonymized composite of live deployments. Client names withheld by policy, and implementation detail is deliberately omitted. Figures other than independently audited results are illustrative of typical outcomes and will vary by office, stack, and call volume.