



Suhas Bhairav

AI Sales Call Transcript Follow Up Template

**Automate extraction of customer needs from calls
and craft personalized follow-ups.**

Turn sales call transcripts into annotated customer requirements and actionable follow-up emails with minimal effort.

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Read, Extract, Follow Up

This page outlines using AI to convert sales calls into structured insights and actions. It covers automation, human review, and the required tools.

Key move **Governance: human review required for pricing or commitments.**

PRACTICAL CHECKLIST

- 01** Ingest call recordings and generate accurate transcripts with speaker labels.
- 02** Use AI to identify customer pain points, requirements, budget signals, and timelines.
- 03** Flag ambiguities for human review and escalation during post-call processing.
- 04** Map key data to a follow-up email template with concrete action items.
- 05** Store outputs with an audit trail for compliance and governance.
- 06** Data/tools needed: recordings, CRM access, secure transcription, NLP, and email engine.

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What to Automate vs Review

Define concrete automations and what must be checked by humans before sending emails. Align with sales process stages.

Key move **Policy: set auto-send thresholds; require manager sign-off for high-risk deals.**

PRACTICAL CHECKLIST

- 01** Automate transcription and extraction of needs, pain points, and budget signals.
- 02** Auto-fill follow-up emails with names, dates, and next steps.
- 03** Auto-suggest next actions and owners by deal stage.
- 04** Human review for commitment language, pricing, and special terms.
- 05** Auto-attach referenced documents and assets to the email thread.
- 06** Tools/data needed: CRM, secure transcription, NLP model, email engine, governance.

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Adopt in Weekly Increments

A pragmatic rollout plan with weekly milestones, roles, data tools, and measurement to minimize disruption. It guides adoption from week 1 onward.

Key move Approval flow: require deal owner and manager sign-off before new templates go live.

PRACTICAL CHECKLIST

- 01** Week 1: connect recording source, CRM, and voice-to-text.
- 02** Week 2: enable extraction of needs and budget signals.
- 03** Week 3: generate and test auto-email templates for a pilot cohort.
- 04** Week 4: implement human review checklist and escalation rules.
- 05** Week 5: assign ownership: template owner, reviewer, and deal owner.
- 06** Week 6: measure metrics: response rate, time-to-follow-up, win rate.
- 07** Week 7: refine prompts, correct misclassifications, tighten data governance.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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