

## 7. Sales CRM assistant

### Project

AI for cleaning up the sales pipeline, suggesting next steps and preparing customer communications.

### Specific solution

The system analyses customer history, emails, meeting notes and proposals in the CRM, then summarises the customer's status and recommends the next action.

### Functions

- summarising customer profiles;
- analysing reasons for lost deals;
- suggesting next steps;
- drafting follow-up emails;
- flagging pipeline risks;
- identifying inactive but potentially valuable customers.

### Measurable results

- better CRM discipline;
- fewer forgotten follow-ups;
- higher proposal conversion;
- more accurate sales forecasts.

### Risk

If CRM data are poor, AI will simply analyse poor data faster. This project often needs to start with data-quality clean-up.