



CRM Update Agent

Updates your CRM automatically when a lead replies to your email. No manual entry needed.

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1 AT A GLANCE

AREA	Sales
TRIGGER	A new reply from a lead in your inbox
RESULT	Up-to-date contact in your CRM with status and summary
INTEGRATIONS (EXAMPLES)	Gmail / Outlook Notion Airtable AI model

2 HOW THE WORKFLOW RUNS



1 Detect the reply

As soon as a lead replies to your email, the agent detects the new message in your inbox.



2 Match the contact

The sender is matched to the right contact in your CRM based on the email address.



3 Read the reply

An AI model summarises the reply in one sentence and detects the intent, for example interest, a meeting request or a no.



4 Update the CRM

Status, date of last activity and a short note are updated in the CRM automatically.



5 Notify you

For important replies, such as a meeting request, you can get an instant notification.

No more manual data entry: your CRM stays current without you copying emails.

IDEAL FOR

- ✓ Anyone who keeps a CRM but rarely has time to update it
- ✓ Sales with many parallel email conversations
- ✓ Teams that want a reliable overview of their pipeline

CUSTOMISABLE

- ✓ Status stages and fields in the CRM
- ✓ Which replies trigger a notification
- ✓ Channel for notifications, e.g. email or Slack

WHAT YOU NEED

- ✓ An email account with API access
- ✓ A CRM, e.g. in Notion or Airtable
- ✓ Defined status stages for your pipeline

PRIVACY & SECURITY

- ✓ Only emails from known leads are analysed
- ✓ Summaries instead of full email copies in the CRM
- ✓ Data stays in your own tools

YOUR CONTROL You see every change in the CRM and can correct it at any time.

This describes the typical process. Every workflow is adapted to your tools, processes and requirements during the project; details and pricing are agreed individually.

Interested in this workflow?

In a free intro call we look at how the workflow can be adapted to your tools.

Book an intro call