

CallQA

Analysis & qualification screens

CALL CONTEXT

Aditya - Rajesh Kumar
Phone 3: 154-990
Today 11:23 AM - 01:51
Score: 65 - 3rd call

SCREENS

- Extended analysis
- Lead qualification
- Comparative analysis

Call analysis - Aditya - Rajesh Kumar - Extended analysis

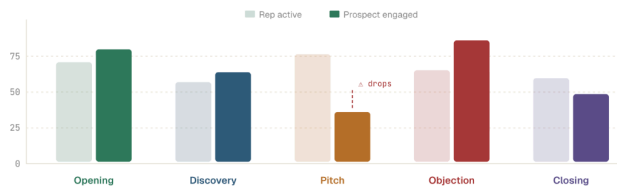
Extended analysis

Engagement: sentiment by topic, persona, confidence, dynamics **84/100**

Score 65 01:51 iPhone 13

Engagement by phase

Prospect engagement from speaking time, questions & sentiment per phase



Insight: Prospect engagement drops sharply during Pitch (rep monologue 0:24-0:33) but spikes during Objection — the down-payment concern is a buying signal, not rejection.

Sentiment by topic

How the prospect felt about each topic — not just overall trajectory

TOPIC	MENTIONS	+	=	-	NET
Down payment NEGATIVE	5	0	1	4	-4
EMI / Finance options	8	2	3	3	-1
Shapmin (alternative)	3	0	2	1	-1
iPhone 13 (product) POSITIVE	2	2	0	0	+2
Bajaj Finance	4	1	1	2	-1

Read: Prospect is positive about the iPhone itself but negative about financing. The product isn't the problem — the payment mechanism is.

Conversation dynamics

Turn-by-turn interactivity, response patterns, power balance

TURN-BY-TURN FLOW - WHO'S DRIVING



Insight: Prospect engagement drops sharply during Pitch (rep monologue 0:24-0:33) but spikes during Objection — the down-payment concern is a buying signal, not rejection.

Sentiment by topic

How the prospect felt about each topic — not just overall trajectory

TOPIC	MENTIONS	+	=	-	NET
Down payment NEGATIVE	5	0	1	4	-4
EMI / Finance options	8	2	3	3	-1
Shapmin (alternative)	3	0	2	1	-1
iPhone 13 (product) POSITIVE	2	2	0	0	+2
Bajaj Finance	4	1	1	2	-1

Read: Prospect is positive about the iPhone itself but negative about financing. The product isn't the problem — the payment mechanism is.

Conversation dynamics

Turn-by-turn interactivity, response patterns, power balance

TURN-BY-TURN FLOW - WHO'S DRIVING



ADITYA (rep)	RAJESH (prospect)
INTERACTIVITY 54 No quiet: 12	PATIENCE 78 0:01 interrupt
TURNS 15 Rep 8, Prospect 7	INTERRUPTIONS 0 None detected

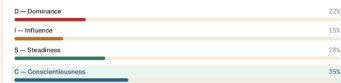
Buyer persona

SSOC profile from speech patterns

Conscientious

Personality: detail-oriented, needs data

Confidence: 72%



EVIDENCE

- Asked clarifying questions ("I'll miss the sim")
- Needed explanation before deciding
- Compared Bajaj vs Shapmin methodically
- Used conditional language ("if/then/else")

RECOMMENDED NEXT-CALL APPROACH

- Lead with data, send comparison table before calling
- Don't rush the close — let them verify
- Acknowledge confusion directly
- Use precise numbers, not "approximately"

Rep confidence

Composite from voice & language patterns

58
below team avg (70)

Filler word rate	7.2/min ▲
Hedge language	4 instances
Pace variance	Low (steady)
Response after objection	4.2s ▲
Assertive language	32%

Flag: 4.2s latency after down-payment objection suggests Aditya was unprepared. Priya's response to the same objection: 0.8s.

This call vs last 3

Insight: Prospect engagement drops sharply during Pitch (rep monologue 0:24-0:33) but spikes during Objection — the down-payment concern is a buying signal, not rejection.

Sentiment by topic

How the prospect felt about each topic — not just overall trajectory

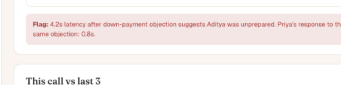
TOPIC	MENTIONS	+	=	-	NET
Down payment NEGATIVE	5	0	1	4	-4
EMI / Finance options	8	2	3	3	-1
Shapmin (alternative)	3	0	2	1	-1
iPhone 13 (product) POSITIVE	2	2	0	0	+2
Bajaj Finance	4	1	1	2	-1

Read: Prospect is positive about the iPhone itself but negative about financing. The product isn't the problem — the payment mechanism is.

Conversation dynamics

Turn-by-turn interactivity, response patterns, power balance

TURN-BY-TURN FLOW - WHO'S DRIVING



ADITYA (rep)	RAJESH (prospect)
INTERACTIVITY 54 No quiet: 12	PATIENCE 78 0:01 interrupt
TURNS 15 Rep 8, Prospect 7	INTERRUPTIONS 0 None detected

Rep confidence

Composite from voice & language patterns

58
below team avg (70)

Filler word rate	7.2/min ▲
Hedge language	4 instances
Pace variance	Low (steady)
Response after objection	4.2s ▲
Assertive language	32%

Flag: 4.2s latency after down-payment objection suggests Aditya was unprepared. Priya's response to the same objection: 0.8s.

This call vs last 3

	85 May	86 May	Today
Score	76	78	65 ▲
Engagement	72	64	54 ▲
Confidence	71	66	58 ▲
Questions	5	3	2 ▲

All metrics declining call-over-call. Consider a different approach or manager takeover.

Aditya Sharma
Great - Sales

Lead qualification

BANT framework auto-filled from call signals - editable by rep

Edit qualification

Push to CRM

WARM

Lead temperature

Rajesh Kumar - iPhone 13 - ₹54,990

3 calls - 7 days in pipeline - source: website inquiry

BUDGET: QUALIFIED AUTHORITY: PARTIAL NEED: STRONG TIMELINE: UNCLEAR

QUALIFICATION SCORE

62/100

Won-deal avg: 78%

Budget

QUALIFIED 75%

SIGNALS DETECTED

- ✓ Engaged in EM discussion at full price (₹54,990) — no price pushback
- ✓ Asked about monthly EMI amounts — budgeting, not rejecting
- ✓ Down-payment objection is about mechanism, not affordability — "₹10k advance" wasn't too much, just unexpected

MISSING

No explicit budget ceiling. Unknown if prospect compared prices at Cashfy/Amazon Renewed.

Authority

PARTIAL 45%

POSITIVE SIGNALS

- ✓ Sole caller across all 3 calls — no "let me check with someone"
- ✓ Uses "I" consistently — self-referential decisions

RISK SIGNALS

- △ No explicit confirmation of sole decision-maker. Rep never asked.
- △ Phone classified as personal — D2C purchase but confirmation missing

ASK NEXT

"Is this purchase for yourself, or are you evaluating for someone else?"

Need

STRONG 80%

STRONG EVIDENCE

- ✓ Initiated via website inquiry — active intent, not cold
- ✓ Returned for 3rd call — high persistence despite objection
- ✓ Proactively asked about Bajaj — researched finance before calling
- ✓ Sentiment positive on iPhone 13 as product (0 negatives)

GAP

Exact use case not explored — replacement or first iPhone? Upgrade from what? Would inform pitch angle.

Timeline

UNCLEAR 30%

INDIRECT SIGNALS

- 3 calls in 7 days suggests near-term intent (not browsing for months)
- No deadline/event mentioned ("birthday", "trip", "Diwali", "new job")

CRITICAL GAP

△ Rep never asked "when do you need it by?" — #1 unasked question across all 3 calls. Without a timeline anchor, there's no urgency lever.

ASK NEXT

"Apko kab tak chahiye phone? Koi specific date hai mind mein?"

Recommended next action

BEFORE NEXT CALL

1. Send Snapmin vs Bajaj comparison table via WhatsApp — Conscientious type needs data before deciding

DURING NEXT CALL

3. Ask timeline: "Rajesh ji, kab tak chahiye aapko phone?"

ESCALATION SIGNALS

- Consider handoff if:
- Next call also scores below 65
 - Prospect mentions Cashfy or competitor
 - 4th follow-up with no movement

Benchmarks

vs leads that converted - last 90 days

This lead's BANT	62
Won deals avg	78
Lost deals avg	41
Win rate at this score	34%
# Timeline resolved	- 58%

Need

STRONG 80%

STRONG EVIDENCE

- ✓ Initiated via website inquiry — active intent, not cold
- ✓ Returned for 3rd call — high persistence despite objection
- ✓ Proactively asked about Bajaj — researched finance before calling
- ✓ Sentiment positive on iPhone 13 as product (0 negatives)

GAP

Exact use case not explored — replacement or first iPhone? Upgrade from what? Would inform pitch angle.

Timeline

UNCLEAR 30%

INDIRECT SIGNALS

- 3 calls in 7 days suggests near-term intent (not browsing for months)
- No deadline/event mentioned ("birthday", "trip", "Diwali", "new job")

CRITICAL GAP

△ Rep never asked "when do you need it by?" — #1 unasked question across all 3 calls. Without a timeline anchor, there's no urgency lever.

ASK NEXT

"Apko kab tak chahiye phone? Koi specific date hai mind mein?"

Recommended next action

BEFORE NEXT CALL

1. Send Snapmin vs Bajaj comparison table via WhatsApp — Conscientious type needs data before deciding

DURING NEXT CALL

3. Ask timeline: "Rajesh ji, kab tak chahiye aapko phone?"

ESCALATION SIGNALS

- Consider handoff if:
- Next call also scores below 65
 - Prospect mentions Cashfy or competitor
 - 4th follow-up with no movement

2. Check with finance ops: Is Bajaj returning? If yes, offer to hold 48 hrs

4. Confirm authority: "Yeh purchase aap apne liye kar rahe hain?"

5. Reframe down-payment: "₹13,750 today, phir ₹4,580/month — total same as Bajaj"

Benchmarks

vs leads that converted - last 90 days

This lead's BANT	62
Won deals avg	78
Lost deals avg	41
Win rate at this score	34%
# Timeline resolved	- 58%

Key insight: resolving Timeline alone moves win rate from 34% → 58%. Single highest-leverage question.

Comparative analysis

This call vs won/lost patterns, best-in-team, coaching recommendations



Critical gaps vs won deals

What winning calls with the same objection profile did differently

- Gap #1 - Objection left unresolved** (IMPACT: -33pp)
Won deals: 89% resolved "down payment" objection within the same call with a Bajaj vs Snapmin comparison.
This call: Acknowledged but didn't reframe or compare — moved to close before resolution.
- Gap #2 - Insufficient discovery** (IMPACT: -18pp)
Won deals: averaged 9.4 questions by rep. This call: 2.
Missing: Why iPhone 13 specifically? Upgrading from what? When needed? For self or gift?
- Gap #3 - Monologue too long in pitch** (IMPACT: -8pp)
Won deals: longest monologue averages 34s. This call: 36s, and prospect engagement dropped during it.
- Strength - No interruptions & good patience** (IMPACT: +4pp)
Won deals: 0.3 interruptions avg. This call: 0. Let prospect finish objection fully before responding.

Best-in-team comparison

Priya handled the same down-payment objection on May 3 — scored 89

Aditya - Today (Score 65 - 01:51)	Priya - May 3 (Score 89 - 02:34)
Discovery questions: 2	Discovery questions: 8
Objection handling: 44/100	Objection handling: 92/100
Objection resolved?: No	Objection resolved?: Yes ✓
Social proof used: None	Social proof: "1,200+ on Snapmin"
Rep confidence: 58	Rep confidence: 84
Approach: Explained → closed	Approach: Ack → reframe → proof → close

Coaching clip - 28 seconds
Priya's response when prospect said "down payment O hota hai na?": acknowledged, paused, reframed ₹13,750 as "less than ₹1,500/day for the first week," cited 1,200 customers. Prospect agreed.
[▶ Watch](#)

Most similar won call

Same objection, same product, similar persona

Priya → Karan Sethi
May 3 - iPhone 13 - Score 89
Match: 84% similarity
Outcome: Won ₹54,990
Key diff: 8 questions, objection resolved with social proof
[▶ Review this call](#)

Most similar lost call

Warning — this call is trending here

Vikram → Nidhi Joshi
Yesterday - iPhone 14 - Score 34
Match: 79% similarity
Outcome: Lost - went to Cashify
Key pattern: 2 questions, objection unresolved, no follow-up
[▶ Review this call](#)

Levers to increase win probability

- Resolve down-payment objection** (34% → 58%) +24pp
 - Establish timeline anchor** (Ask "sab chahiye?") - create urgency +12pp
 - Use social proof** ("1,200 customers on Snapmin") +8pp
 - Send comparison table** (Data-driven prospects convert 2x) +6pp
- All four addressed: 34% → projected 72%. Above won-deal average.

Engagement scoring

Weights for computing prospect engagement per phase

Speaking time ratio Prospect's share of talk time in phase	40%
Question count Questions asked by prospect in phase	25%
Sentiment positivity Average sentiment score in phase	20%
Response speed How quickly prospect responds	15%
Total: 100%	

Rep confidence scoring

Signals and thresholds for computing rep confidence

Filler word rate Flag if above threshold per minute	≥ 5/n
Hedge language count "maybe", "I think", "sort of", "shayad"	≥ 3
Objection response latency Seconds to respond after objection	≥ 3.0s
Pace variance WPM standard deviation across call	≥ 25%
Assertive language ratio Min % for healthy confidence	≥ 40%

Topic & sentiment trackers

Topics to track sentiment on during calls — used in sentiment-by-topic matrix

+ Add topic group

TOPIC GROUP	KEYWORDS (EN + HINGLISH)	PRIORITY	ACTIVE
Pricing & EMI	price, EMI, cost, kitna, monthly, down payment, advance, finance, + add	HIGH	<input checked="" type="checkbox"/>
Product quality	condition, refurbished, warranty, original, quality, battery, scratch, + add	HIGH	<input checked="" type="checkbox"/>
Competitors	Cashify, Amazon Renewed, OLX, Flipkart, 2GUD, competitor, + add	MED	<input checked="" type="checkbox"/>
Delivery & logistics	delivery, shipping, COD, return, kab millega, address, + add	LOW	<input checked="" type="checkbox"/>
Finance partners	Bajaj, Snapmin, ZestMoney, LazyPay, Simpli, + add	MED	<input checked="" type="checkbox"/>

Comparison & pattern matching

Settings for win/loss pattern and best-in-team analysis

Benchmark lookback period How far back to compute win/loss patterns	30d 90d 180d All
Similarity match threshold Minimum % to show as "similar call"	≥ 60%
Min calls for pattern reliability Minimum sample size before showing patterns	20
Match criteria Which dimensions to use for similarity	PRODUCT OBJECTION TYPE PERSONA PRICE RANGE

Buyer persona detection

DISC model configuration and display settings

Detection model Framework for classifying buyer persona	DISC Myers-Briggs Custom
Confidence threshold to display Don't show persona if below this	≥ 55%
Show recommended approach Auto-generate talk-track tips per persona	<input checked="" type="checkbox"/>
Hinglish language support Include Hindi/Hinglish patterns in analysis	<input checked="" type="checkbox"/>
Min call duration for persona Skip detection on very short calls	60s

CallQA

Analysis & qualification screens

CALL CONTEXT

Aditya → Rajesh Kumar
Phone 13 - 754,990
Today 11:23 AM - 01:51
Score: 65 - 3rd call

SCREENS

Extended analysis

Lead qualification

Comparative analysis

ADMIN

Analysis config

Admin → Analysis configuration

Analysis configuration

Configure scoring, qualification, engagement, and comparison rules across all call analysis

↔ Reset to defaults

✓ Save changes

Qualification framework

Choose and configure the framework used to qualify leads from call signals

BANT MEDDIC SPIN Custom

DIMENSION	WEIGHT	QUALIFIED AT	AI SIGNAL KEYWORDS	ACTIVE
Budget Prospect's ability and willingness to pay	30%	≥ 60%	price EMI budget afford kitna cost + add	<input checked="" type="checkbox"/>
Authority Is this the decision maker?	20%	≥ 50%	decision wife husband family boss apne lie + add	<input checked="" type="checkbox"/>
Need Strength of the prospect's requirement	25%	≥ 65%	chahiye need looking for upgrade replace urgent + add	<input checked="" type="checkbox"/>
Timeline When the prospect needs to buy	25%	≥ 40%	kab tak when deadline Diwali birthday this week + add	<input checked="" type="checkbox"/>

+ Add custom dimension

Total weight: 100%

Lead temperature thresholds

Define qualification score boundaries for Hot / Warm / Cold classification



Engagement scoring

Weights for computing prospect engagement per phase

Speaking time ratio Prospect's share of talk time in phase	40%
Question count Questions asked by prospect in phase	25%
Sentiment positivity Average sentiment score in phase	20%
Response speed How quickly prospect responds	15%

Total: 100%

Rep confidence scoring

Signals and thresholds for computing rep confidence

Filler word rate Flag if above threshold per minute	≥ 5/m
Hedge language count "maybe", "I think", "sort of", "shayad"	≥ 3
Objection response latency Seconds to respond after objection	≥ 3.0s
Pace variance WPM standard deviation across call	≥ 25%
Assertive language ratio Min % for healthy confidence	≥ 40%

Comparison & pattern matching

Settings for win/loss pattern and best-in-team analysis

Benchmark lookback period

How far back to compute won/lost patterns

30d 90d 180d All

Similarity match threshold

Minimum % to show as "similar call"

≥ 60%

Min calls for pattern reliability

Minimum sample size before showing patterns

20

Match criteria

Which dimensions to use for similarity

PRODUCT OBJECTION TYPE PERSONA PRICE RANGE

Buyer persona detection

DISC model configuration and display settings

Detection model

Framework for classifying buyer persona

DISC Myers-Briggs Custom

Confidence threshold to display

Don't show persona if below this

≥ 55%

Show recommended approach

Auto-generate talk-track tips per persona

Hinglish language support

Include Hindi/Hinglish patterns in analysis

Min call duration for persona

Skip detection on very short calls

60s

Call phase definitions

How the AI segments a call into phases — used across all analysis screens

+ Add phase

ORDER	PHASE NAME	DETECTION SIGNALS	COLOR	IDEAL %
1	Opening	greeting introduction namaste hello	Green	18%
2	Discovery	question tell me what are you kya chahiye	Blue	25%
3	Pitch	features benefit product certified warranty	Brown	25%
4	Objection	but lekin problem concern nahi expensive	Red	28%
5	Closing	confirm book order proceed payment chalein	Purple	20%

Call score composition

How the overall call score (e.g. 65/100) is computed — the single most visible metric

Preview: Rajesh Kumar call → 65

DIMENSION	WEIGHT	WHAT IT MEASURES	PREVIEW
Discovery depth	20%	Questions asked, needs uncovered, use-case explored	38
Objection handling	25%	Acknowledged, reframed, resolved, or escalated	44
Engagement quality	15%	Interactivity, talk ratio balance, patience	68
Script adherence	15%	Required phrases hit, compliance disclosures made	82
Closing attempt	15%	Clear ask, next step set, follow-up anchored	72
Compliance	10%	Mandatory disclosures, no banned phrases, refurbished disclaimer	90

+ Add dimension

Total: 100% · Weighted score preview: 65.1

Call score composition

How the overall call score (e.g. 65/100) is computed — the single most visible metric

Preview: Rajesh Kumar call → 65

DIMENSION	WEIGHT	WHAT IT MEASURES	PREVIEW
Discovery depth	20%	Questions asked, needs uncovered, use-case explored	38
Objection handling	25%	Acknowledged, reframed, resolved, or escalated	44
Engagement quality	15%	Interactivity, talk ratio balance, patience	68
Script adherence	15%	Required phrases hit, compliance disclosures made	82
Closing attempt	15%	Clear ask, next step set, follow-up anchored	72
Compliance	10%	Mandatory disclosures, no banned phrases, refurbished disclaimer	98

+ Add dimension

Total: 188% · Weighted score preview: 65.1

How it works: Each dimension is scored 0–100 by the AI model, then multiplied by its weight. The sum is the call score. Changing weights here recomputes all historical scores — use "Save & recompute" to apply retroactively.

Objection library

Known objection types the AI should detect, categorize, and track resolution rates

+ Add objection type

OBJECTION TYPE	DETECTION KEYWORDS	RECOMMENDED RESPONSE	HIST. RESOLVE %
Down payment / advance Prospect resists upfront payment	down payment, advance, upfront, pehle paisa, O down	Reframe as daily cost: "₹13,750 = ₹1,500/day for first week." Offer Bajaj vs Snapmin comparison table. Use social proof: "1,200+ customers chose this option."	52%
Refurbished quality doubt Prospect questions if product is genuine	purana, second hand, used, original hai, fake, quality	Lead with "32-point certified." Mention warranty + 7-day return. Share unboxing video link. Reference Apple-grade parts.	74%
Competitor comparison Prospect mentions a competitor	Cashify, Amazon, OLX, Flipkart, cheaper, wahan pe	Don't bash competitor. Differentiate on certification, warranty, EMI. Ask "Did they offer EMI?" (usually no). Highlight Grest's return policy.	61%
Price too high Prospect thinks product is overpriced	expensive, mehenga, zyada, discount, kam karo, budget	Anchor vs new price (save 40%). Break into EMI: "₹X/month." Offer exchange bonus if trading in old device. Don't discount — add value.	68%
Need to think / stalling Prospect defers without clear reason	sochna hai, baad mein, let me think, later, call back, abhi nahi	Probe: "Kya koi specific concern hai?"; Set a concrete callback: "Kal 11 baje call karun?"; Create mild urgency: "stock limited hai is model ka."	31%

Note: Historical resolve % updates nightly from closed deals. "Recommended response" is shown to reps on the coaching clip suggestion and in the AI follow-up drafter. Objection types with resolve rate <40% are flagged for manager review.

Buying signal definitions

Signals the AI detects as purchase intent — feeds qualification score and deal health

+ Add signal

<input checked="" type="checkbox"/> EMI / finance inquiry Prospect asks about payment plans, EMI options, or finance partners	Strength Low Med High	EMI finance monthly installment
<input checked="" type="checkbox"/> Repeat contact Prospect calls back or takes 2+ calls on the same product	Strength Low Med High	2+ calls auto-detect
<input checked="" type="checkbox"/> Delivery / logistics inquiry Asks about shipping, COD, delivery time, or address	Strength Low Med High	delivery kab milega COD address
<input checked="" type="checkbox"/> Specific model / variant ask Asks about a specific color, storage, or variant	Strength Low Med High	128GB color variant konsa wala
<input checked="" type="checkbox"/> Payment mode discussion Asks about UPI, card, COD, or payment link	Strength Low Med High	UPI GPay card payment link
<input checked="" type="checkbox"/> Urgency language Prospect expresses time pressure or event-driven need	Strength Low Med High	jaldi aaj urgent birthday gift

Compliance & script rules

Mandatory phrases, banned language, and disclosures that trigger compliance scoring and flags

REQUIRED PHRASES (MUST SAY)

"Certified refurbished" Must mention within first 60 seconds of pitch	MANDATORY ✕
"7-day return policy" Must mention before closing attempt	MANDATORY ✕
"Warranty included" Must mention warranty duration	RECOMMENDED ✕
"Grest" (brand name) Must introduce company name in opening	MANDATORY ✕
+ Add required phrase	

BANNED PHRASES (MUST NOT SAY)

"Brand new" / "nayi phone" Misleading — product is refurbished	BLOCKS SCORE ✕
"Guarantee" (without qualifier) Must say "warranty" not "guarantee" — legal distinction	BLOCKS SCORE ✕
Competitor bashing Direct negative claims about Cashify, Amazon, etc.	FLAGS REVIEW ✕
Pressure language "abhi nahi toh nahi milega", "last piece", false scarcity	FLAGS REVIEW ✕
+ Add banned phrase	

Alert & auto-action rules

Triggers that fire notifications, auto-flag calls, or escalate to managers

+ Add rule

TRIGGER CONDITION	ACTION	NOTIFY	ACTIVE
Call score < 50 Any call scoring below threshold	FLAG FOR COACHING ADD TO REVIEW QUEUE	Manager Rep	<input checked="" type="checkbox"/>
3+ calls with declining scores Same lead, score dropping each call	ESCALATE TO MANAGER SUGGEST HANDOFF	Manager	<input checked="" type="checkbox"/>
Banned phrase detected Rep used a phrase from banned list	COMPLIANCE FLAG ADD TO COMPLIANCE QUEUE	Compliance lead Manager	<input checked="" type="checkbox"/>
Hot lead detected (BANT ≥ 75) Lead qualifies as hot post-call	AUTO-DRAFT FOLLOW-UP PUSH TO CRM	Rep	<input checked="" type="checkbox"/>
Competitor mentioned Prospect names Cashify, Amazon, OLX etc.	TAG CALL SUGGEST BATTLE CARD	Rep	<input checked="" type="checkbox"/>
No follow-up in 48 hrs Warm/hot lead with no activity after call	NUDGE REP ESCALATE AT 72H	Rep (48h) Manager (72h)	<input checked="" type="checkbox"/>

CRM field mapping

Maps CallQA outputs to your CRM fields — used when "Push to CRM" is clicked

Salesforce HubSpot Zoho Custom API

CALLQA FIELD	→	CRM FIELD (HUBSPOT)	AUTO-PUSH
Lead temperature	→	lead_status	<input checked="" type="checkbox"/>
BANT score	→	custom_bant_score	<input checked="" type="checkbox"/>
Call score	→	custom_call_score	<input checked="" type="checkbox"/>
Action items	→	notes_next_steps	<input checked="" type="checkbox"/>
Call summary	→	engagement_notes	<input type="checkbox"/>
Objections detected	→	custom_objections	<input type="checkbox"/>
Buyer persona (DISC)	→	custom_buyer_persona	<input type="checkbox"/>

+ Map additional field Test connection

✓ Connected - last sync: 2 min ago

AI coaching & follow-up rules

Controls when the AI suggests coaching clips, auto-drafts follow-ups, and generates recommendations

COACHING CLIP SUGGESTIONS

Min score gap to suggest clip

How much better must the reference call be

+20

Same objection type required

Only suggest clips with matching objection

Max clip length

Trim suggested clips to this duration

45s

AUTO FOLLOW-UP DRAFTS

Auto-draft after every call

Generate WhatsApp/email draft immediately

Default channel

Primary channel for follow-up drafts

WhatsApp SMS Email

Default tone

Tone preset for generated messages

Friendly Professional Urgent

AI coaching & follow-up rules

Controls when the AI suggests coaching clips, auto-drafts follow-ups, and generates recommendations

COACHING CLIP SUGGESTIONS

Min score gap to suggest clip

How much better must the reference call be

+20

Same objection type required

Only suggest clips with matching objection

Max clip length

Trim suggested clips to this duration

45s

Same product category

iPhone clips for iPhone calls, etc.

AUTO FOLLOW-UP DRAFTS

Auto-draft after every call

Generate WhatsApp/email draft immediately

Default channel

Primary channel for follow-up drafts

WhatsApp SMS Email

Default tone

Tone preset for generated messages

Friendly Professional Urgent

Include comparison table

Auto-attach product comparison when objection detected

Language

Match call language or override

Match call English Hindi

Last saved: 10 May 2026, 02:14 PM by Sat (admin)

→ Discard changes

✓ Save & recompute all calls