AI-powered automated Meeting Minutes App for Salesforce

SMART MEETING MINUTES

Created by Attention CRM Consulting for use with Salesforce®

This App Saves Time for Sales.

Smarter Meetings. Sharper Sales.

Empower your team with AI-powered note-taking and reporting inside Salesforce.
Trusted by enterprise sales teams to save time, stay aligned, and act faster.

Smart Meeting Minutes automatically generates AI-powered transcripts and summaries of Zoom (and soon: Teams & Google Meet) calls, and connects them directly to **Salesforce** meeting records.
Add the **Agentforce** integration, and you unlock instant, contextual intelligence across multiple meetings — sorted by account, opportunity, or any criteria you choose.

Use it to:

- Get the admin done - Save reps hours each week
- Make insights searchable and shareable
- Eliminate manual meeting reporting
- Standardize handovers and client communication

SMART MEETING MINUTES

Why Smart Meeting Minutes is Not a “Nice to Have” – It’s Urgent.

Only 30% of sales reps’ time is spent selling — the other 70% is buried in admin and meeting prep.

The Culprits

- Manual note-taking during calls
- Writing summaries and follow-ups after meetings
- Searching old notes across tools
- Recreating lost context for deals already in motion

The Reality

- **Reps lose 5–8 hours a week** to repetitive meeting-related tasks
- That’s **1 full workday per week — gone**.

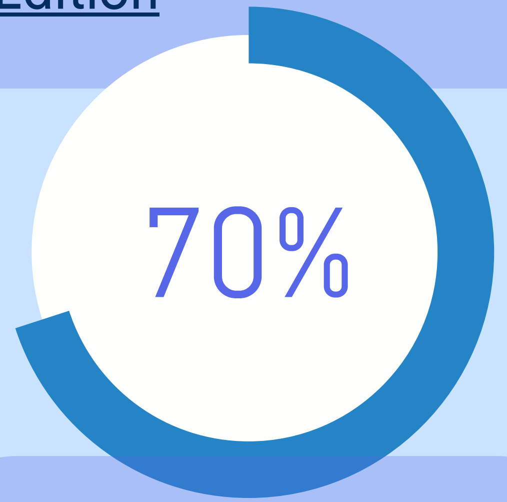
“Sales reps report spending a mere 30% of their time on actual selling activities. The remaining 70% is consumed by non-selling tasks such as administrative work, data entry, and internal meetings.”

— Salesforce State of Sales, 6th Edition

The Fix = Smart Meeting Minutes:

- Notes and summaries are automated
- Everything lives in Salesforce
- Context is never lost
- Time goes back where it belongs: into the **pipeline**

FOCUS ON SELLING



Non-selling tasks consume valuable time.

The SMART Framework

SMART MEETING MINUTES

Why high-performing sales teams adopt Smart Meeting Minutes

S — **Save Time**

Cut admin work with instant summaries and transcripts
No more manual notes or rewatches — every call is documented automatically in Salesforce.

M — **Meeting Context**

Get a full picture across meetings with Agentforce
Group meetings by opportunity, account, or any tag to extract actionable, AI-powered insights.

A — **AI-Powered Workflows**

Zoom AI + Agentforce + Salesforce, working together
SMM runs in the background — no switching tools, no copy-paste, just results.

R — **Reporting Made Easy**

Structured summaries that improve coaching and visibility
Give sales leaders access to real conversations, not just anecdotes.

T — **Templates & Sharing**

Polished client-ready notes in one click
Use templates to send meeting recaps straight from Salesforce — fast, consistent, on-brand.

From first call to final deal — make every meeting SMART.

What Smart Meeting Minutes Delivers — Automatically

Time-saving automation

- Reps get fully written summaries and transcripts immediately after Zoom/Teams/Meet calls
- No need to rewatch recordings or rewrite notes

100% Salesforce-native

- Transcripts, summaries, and templates are saved as part of the Event record
- Admins and managers can access everything in one place

Client-ready communication in one click

- Use templates to generate polished meeting recaps and send directly from Salesforce
- Ensures professional, fast follow-ups without extra work

Agentforce deep-dive summaries

- Use AI to extract insights across multiple meetings
- Filter and generate summaries by deal, account, region, team, or any custom tag

Perfect for coaching & reporting

- Managers can review meetings effortlessly
- Use real conversations to improve training and forecast accuracy

From Call to Context in 60 Seconds

Smart Meeting Minutes works in the background to capture and enrich every sales call — with no disruption to your workflow. It integrates seamlessly with Zoom today, and will support Microsoft Teams and Google Meet soon.

Start
Sales call starts (Zoom/Teams/Meet)

Meeting
AI listens & captures content

Summarised
Summary + transcript saved to SMM

Share
One-click client note

Agentforce
Generate advanced insights across multiple meetings

All in one
Everything stays linked to the right account, opportunity, or contact

zoom

Microsoft Teams

Google Meet

Salesforce

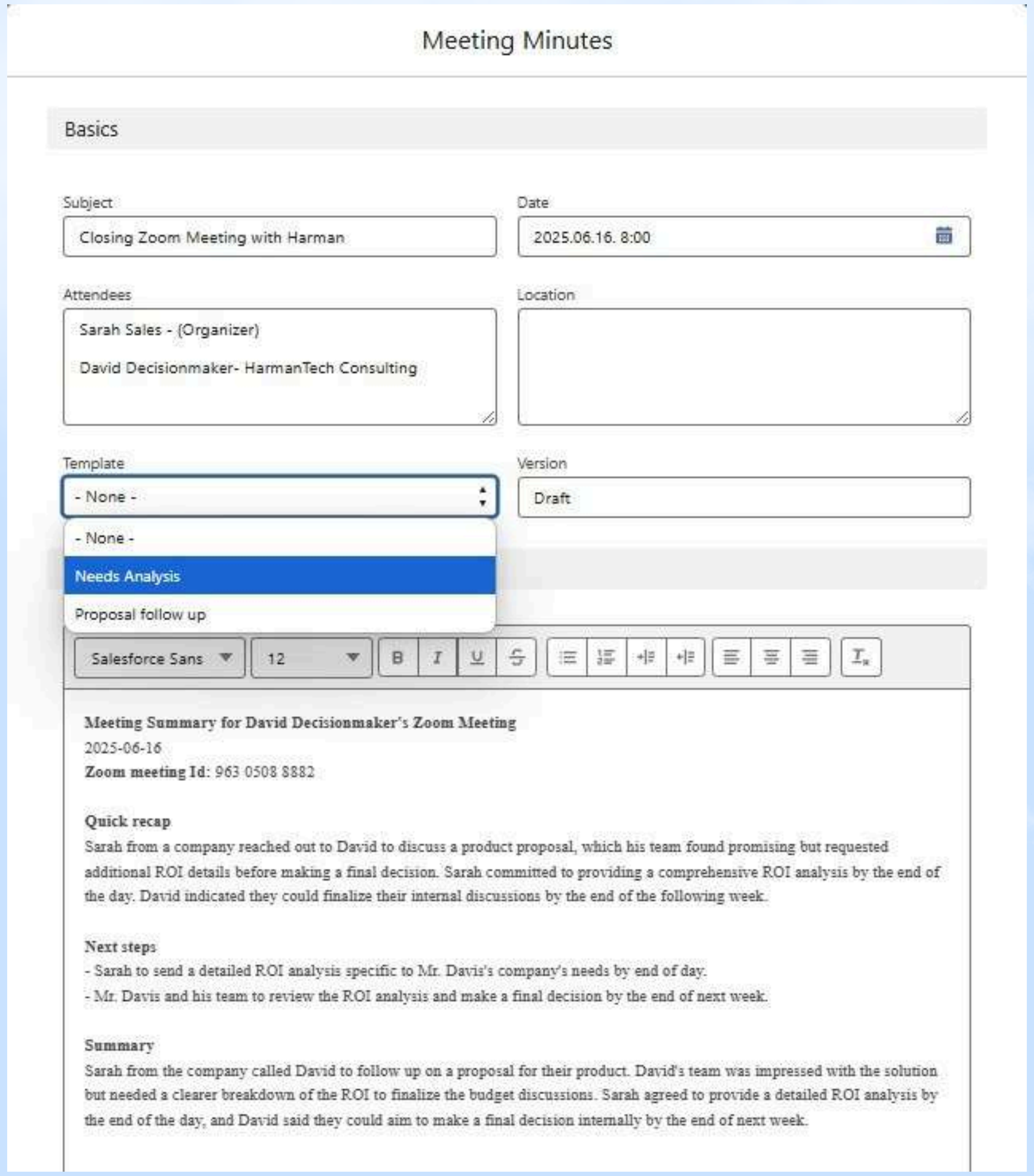
SMART MEETING MINUTES

Agentforce

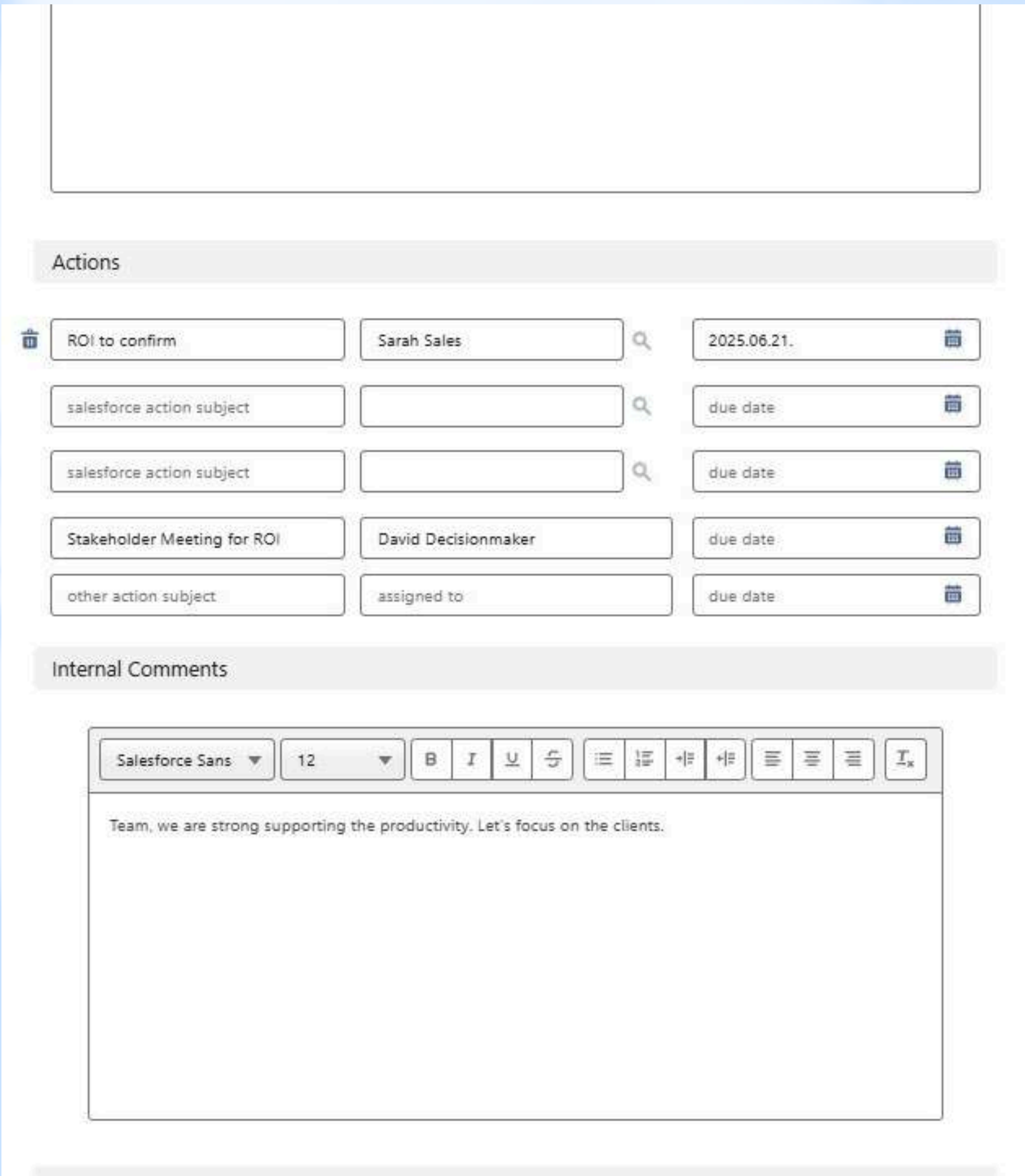
From Call to Context in 60 Seconds

Native. Automated. Always Client-Ready.

Reps never leave Salesforce. Notes, transcripts, and summaries all appear in the right place.



Create tasks and add internal comments right where the action is — no more scattered follow-ups.



No switching tabs. No external tools. No formatting hell.

Start With a 30-Day Pilot — Zero Risk, Real Impact

SMART MEETING MINUTES

- Free 30-day trial in Prod (or Sandbox)
- Fully self-service install via AppExchange
- Onboarding call included (30 mins)
- Enterprise-ready with Support
- Need something custom? As a Salesforce Summit Partner, we build it.

ROI Estimate

Average sales rep spends ~8 hours/week on manual meeting work (prep, notes, follow-up). With **Smart Meeting Minutes**, you save ~6 hours/week/rep → ~24 hours/month. That's **3 full extra selling days** per month, per rep.

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What Our Customers Say About it

SMART MEETING MINUTES

⭐⭐⭐⭐⭐

Smart Meeting Notes – A Game Changer for Our Sales Team

Now, with Smart Meeting Notes, everything happens right inside Salesforce. Sales can enter notes quickly, send a clean PDF to the Executive team, and the VP of Sales has full visibility into meetings and follow-ups. One of the team's favorite features is the ability to assign action items—not just to people inside our company, but to customers too (like the buyer). That's been super helpful.

⭐⭐⭐⭐⭐

Easy to set up, even easier to use

We are using the basic functionalities for collecting meeting minutes and assigning tasks, for a better overview of our f2f and online interactions. The users did not require heavy trainings and the solution was used almost immediately.

⭐⭐⭐⭐⭐

Great App!

Saves our sales a lot of time. Built in templates are super useful during the meetings, they provide a guideline for the meeting.

Let Your Salesforce Sell Smarter.

SMART MEETING MINUTES

Ready to See It in Action?

- **Try Smart Meeting Minutes directly from the AppExchange.**
- **Schedule a live demo with Agentforce intelligence enabled.**
- **Talk to our solution team for enterprise rollout plans.**

Who's Behind Smart Meeting Minutes?

SMART MEETING MINUTES

Built by **Attention CRM Consulting**

Salesforce Summit Partner. 350+ projects. Trusted across industries.

Attention CRM Consulting.

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- Salesforce **Summit Consulting Partner** since 2022 (partner since 2011)
- 350+ projects | 250+ clients | 92 certified experts | 348 certifications
- Specialists in: **Sales, Service, Marketing, CG Cloud, Field Service, Account Engagement**
- Trusted by Lenovo, Micron, GE, Clearwater, Grain & Protein Technologies
- HQ in Hungary, delivering across **3 continents**, 100% Salesforce-native delivery team
- Expertise across all industries – from **telco to manufacturing to fintech**
- Smart Meeting Minutes is our flagship **AppExchange product**