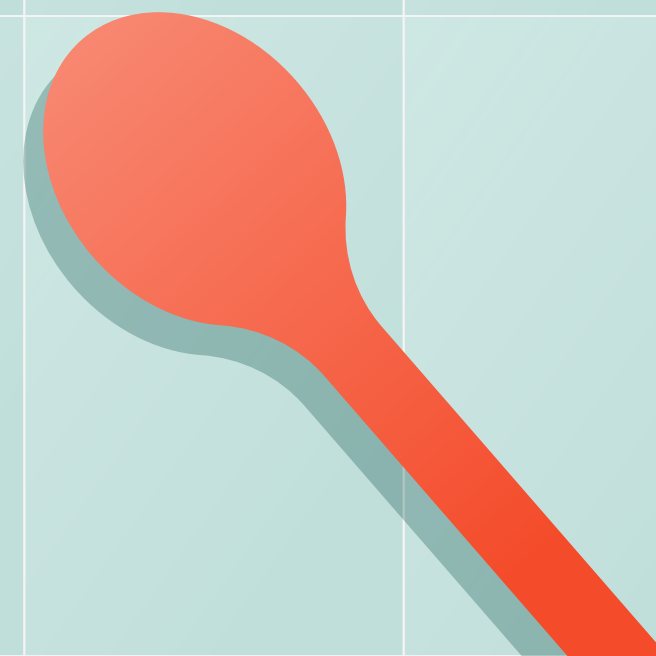


# The Conversation Intelligence Cookbook

The secret sauce for turning sales  
conversations into conversions.

Salesloft.



# Got an appetite for a stronger sales process?

Conversation Intelligence  
is your secret sauce.


We've put together  
this “recipe book”

to show you how easy it can be to gain valuable insights about buyers and sellers, keep your pipeline full, and close deals fast — all with the help of Salesloft's Conversation Intelligence tool.

The best part is, all of these recipes are easy to make with our all-in-one platform.

Follow our step-by-step instructions for mixing Salesloft Conversations with other tools like signals, deal insights, and AI agents to better understand — and replicate — the most productive sales conversations.

**Bon Appétit!**



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# Ingredients for success

To turn raw conversations into winning actions that drive results, consider adding the following Conversation Intelligence (CI) ingredients into your mix.



**\* Action Items:**

Generates action items for sellers based on what occurred in the conversation

**\* Analytics Interpreter Agent:**

Analyzes and identifies insights and trends in your data, then generates summaries and explanations to help you make informed decisions

**\* Ask Salesloft Agent:**

Answers natural-language questions with instant, data-rich insights from across Salesloft

**\* Cadence Builder:**

Creates and customizes multi-step outreach workflows to engage prospects and customers

**\* Call Recordings Auto-Linked to Deals:**

Automatically attaches call recordings to the relevant opportunity or deal for easy access and context

**\* Coaching Dashboard:**

A centralized view in Salesloft that tracks coaching activity, feedback, and performance trends to help managers develop their teams

**\* Command Center Insights:**

Real-time visibility into your revenue pipeline — highlighting at-risk deals, coaching opportunities, and performance trends

**\* Account Research Agent:**

Collects and synthesizes relevant information about accounts using insights from the web and data from past calls, emails, and engagement

**\* AI Email Agent:**

Uses generative AI to compose and edit emails in seconds for personalized messaging that sounds like you.

**\* Key Moments:**

AI scans call transcripts and identifies key topics and concepts you want to track such as sales methodology, competitors, pricing, and more.

**\* MEDDPICC Extraction Agent:**

Automatically pulls insights from your sales calls to properly qualify deals and ensures that sellers stick to the framework

**\* Person Research Agent:**

Researches the buyer and summarizes key contact-specific insights from previous conversations

**\* Pipeline Dashboard:**

Real-time view of pipeline health, deal progress, and risk signals to help prioritize and accelerate opportunities

**\* Playlists:**

Curated collections of call recordings in Salesloft, used for coaching, onboarding, and sharing best-practice conversations

**\* Plays:**

Automated workflows that generate tasks, like calls or emails, based on buyer signals to prompt timely actions

**\* Plays from Salesforce Custom Object Signals:**

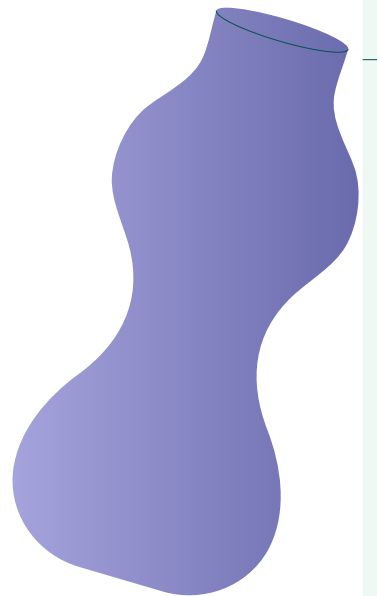
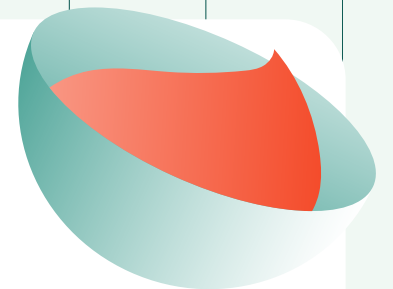
Turns first-party CRM data (like support cases, contracts, or install bases) into automated workflows. Triggers Plays in Salesloft when custom objects in Salesforce are created or updated, so reps can act fast on key customer events.

**\* Summaries:**

Automatically generates overviews of sales calls and meetings, capturing key points, next steps, and context for quick follow-up and action

**\* Tracker Terms:**

Words, phrases, or grouped keywords configured in Salesloft that scan conversation transcripts to flag key topics, recurring themes, or coaching signals





## Recipe 1:

# Craft winning messages

Stage: Prospecting

## Relevance wins attention.

Generic messaging blends into the inbox and slows momentum. Conversation Intelligence and agents pull conversation summaries, account context, and key objections from Salesloft, your CRM, and trusted external sources so messages feel specific, earn replies, and book the next meeting.

## Ingredients

Conversation Intelligence

Account Research Agent

Plays (for meeting prep and follow-up)

Key Moments

Action Items

Ask Salesloft Agent

AI Email Agent

## Steps

1. **Bring an expert-level POV to every call.** Use the Account Research Agent to pull key insights about the account. Craft messaging that's tailored to them, so you have a better shot at booking the meeting.
2. **Once you book the meeting,** check out Key Moments to see what resonated. Look at buyer sentiment, objections, and competitor mentions. You can also use the Ask Salesloft Agent to pull extra insights from your conversation transcripts.
3. **Follow up like a pro** by embedding key takeaways and recommended next steps into your meeting follow-ups.
4. **Move the deal forward with AI Email Agent.** Messages generated with Salesloft's AI Email Agent use your conversation insights to reflect what actually happened on the call, so your first draft is always on-point before you customize it.

## Results

You lead with the buyer's language and a sharp POV shaped by call notes, Account Research, and Key Moments. **Prospects recognize themselves in the story and respond with urgency, setting the first meeting while your point of view is fresh and relevant.**

“

In the crucial prospecting stage,  
**Conversation Intelligence** offers  
**a deeper context** that not only  
surfaces areas for improvement but  
also uncovers a clearer path forward  
— all grounded in what buyers have  
actually shared.”

**Colton Finn,**

Revenue Readiness Program Manager at Salesloft

## Recipe 2:

# Accelerate deals

**Stage:** Opportunity management

Structured qualification  
is the gear that keeps  
deals moving.

But our data shows only a third of sellers report using frameworks like MEDDPICC. Conversation Intelligence and agents automate the heavy lifting, extract the proof you need, and keep opportunities advancing with fewer stalls.

## Ingredients

- Conversation Intelligence
- Call Recordings Auto-Linked to Deals
- Tracker Terms
- Summaries
- Key Moments
- Action Items
- MEDDPICC Extraction Agent

## Steps

- 1. Get all the context you need in one place.** Review call recordings auto-linked to deals without jumping between tools.
- 2. Uncover critical intel.** Use Tracker Terms to identify specific terms or phrases, such as competitor mentions, to help you strengthen your differentiation and get ahead of objections.
- 3. Stay on top of your next steps.** Create AI-generated summaries, highlight key moments, and surface action items, all with just a few clicks.
- 4. Assess deal health and identify qualification gaps.** The MEDDPICC Extraction Agent pulls critical qualification details and helps you identify the leads with the highest conversion potential.
- 5. Refine your deal strategy the way only humans know how.** Combine insights to move your opportunities forward, whether that's overcoming objections, aligning with key stakeholders, or reinforcing value.

## Results

**You move quickly with context:** summaries, Key Moments, and auto-extracted MEDDPICC give you the proof and next steps that keep momentum. Risks, objections, and stakeholder gaps surface early, **improving executive conversations and forecast quality as more deals advance to commit.**



## Recipe 3:

# Optimize pipeline health

**Stage:** Opportunity management

Relying solely on CRM data leaves gaps in understanding your pipeline.

To improve pipeline management and forecasting, you need holistic insight across all of your opportunities.

## Ingredients

- Conversation Intelligence
- Pipeline Dashboard
- Summaries
- Key Moments
- Analytics Interpreter Agent
- MEDDPICC Extraction Agent

## Steps

- 1. Get a real-time view of your pipeline.** Easily see which deals are progressing and which have stalled using the Pipeline Dashboard.
- 2. Review context-rich call summaries and key moments.** Use AI-generated call summaries and highlighted key moments to quickly gain insights about your open opportunities, or dive into the full transcript for a specific call.
- 3. Generate rep-specific next steps.** The Analytics Interpreter Agent analyzes your pipeline and team activity, providing next steps to help sellers prioritize opportunities, keep prospects engaged, and maintain a healthy pipeline.
- 4. Qualify your leads.** Use the MEDDPICC Extraction Agent to ensure your deals are qualified based on your unique criteria.

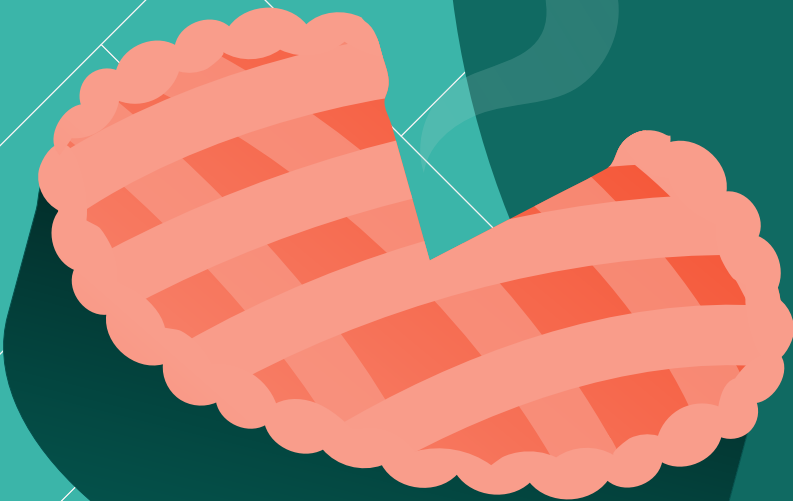
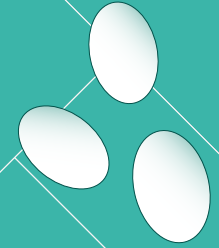
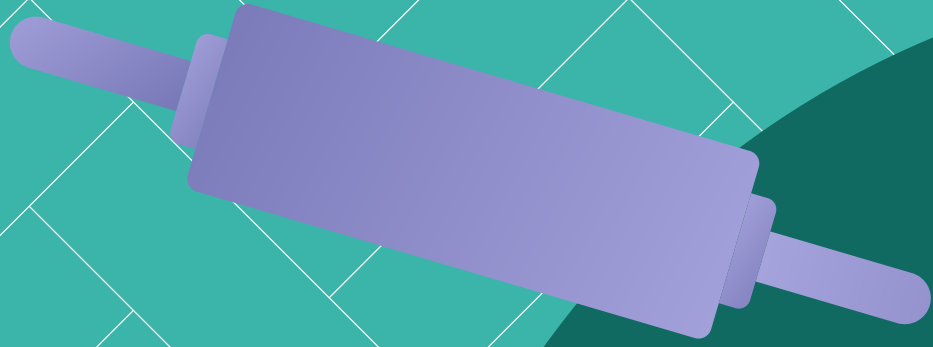
## Results

**You get a true read on the business with stalls, risks, and next steps in one view.** Surprises at commit drop, stage-to-stage conversion steadies, and leaders see exactly where to lean in and whether the forecast is defensible.

“

The real power of having insights  
built into your workflow?  
**Time saving. Efficiency. Accuracy.**  
You don't miss a thing  
— it's seamless.”

**Colton Finn,**  
Revenue Readiness Program Manager at Salesloft



## Recipe 4:

# Deliver targeted sales coaching at scale

**Stage:** Coaching and development

## The calls are happening.

The activity's there. But when sellers miss the mark, it's hard to know why — and 37% say they rarely get personalized feedback. Tools like Command Center, Playlists, and the Coaching Dashboard help managers spot what's working, flag what's not, and coach the moments that actually move deals.

## Ingredients

- Conversation Intelligence
- Analytics Interpreter Agent
- Command Center Insights
- Playlists
- Coaching Dashboard

## Steps

- 1. Proactively monitor rep activity.** Use the Analytics Interpreter Agent to summarize performance data, so you can act on trends and changes quickly.
- 2. Improve objection handling.** Uncover systemic issues or individual rep challenges around objections with AI-generated insights from the Command Center.
- 3. Highlight key coaching moments.** Review selected calls to see what sellers are doing and build playlists that help sellers replicate what's working and improve what isn't.
- 4. Codify seller development.** Track progress and coach consistently via the Coaching Dashboard, using it to structure 1:1s and document development over time.

## Results

**Coaching becomes targeted, consistent, and tied to what reps actually need to improve.** As objection handling, deal progression, and executive conversations sharpen, more reps hit plan and leaders gain confidence in pipeline quality and forecast accuracy.

## Recipe 5:

# Grow existing accounts (and avoid churn)

**Stage:** Customer retention and expansion

More businesses are  
turning to their customer  
base for growth.

To do it well, teams need a clear read on what's happening inside the account: Are they happy or frustrated, what are they saying on calls, how's usage trending, did the champion leave, are they kicking the tires on competitors? AEs, CSMs, and CS leaders need a way to see around corners and act early.

## Ingredients

- Conversation Intelligence
- Ask Salesloft Agent
- Summaries
- Tracker Terms
- Plays from Salesforce Custom Object Signals


## Steps

- 1. Flag churn risks.** Use the Ask Salesloft Agent to search transcripts, CRM notes, and email history to deliver the talking points you need to retain customers.
- 2. Automate customer conversation cheat sheets.** Extract essential customer data from conversations with summaries to prepare for customer follow-up.
- 3. Manage the customer journey.** Uncover customer wants, needs, and opportunities using Tracker Terms so you can guide them to the next step and stay ahead of potential churn.
- 4. React instantly to lifecycle events.** Use Plays from Salesforce Custom Object Signals to trigger tasks when critical customer events happen — like a high-priority case closing or a contract renewal approaching — so your team follows up on time, every time.

## Results

You catch renewal risk early and turn it into a clear success plan with owners and dates, supported by action-oriented summaries that pull everything we know about the customer from across sources. **Expansion gets more predictable as next steps are agreed with the customer, and leaders can trust the NRR number.**





“  
You can actually start at a higher  
level with your team by having **AI**  
**point you in the direction of focus.**  
Getting that immediately from a click  
of a button as opposed to having to  
analyze it yourself gets you to the  
heart of the work faster.”

**Colton Finn,**  
Revenue Readiness Program Manager at Salesloft



Customer story:

# Wrike's recipe for success



## Customer

Wrike is a leader in intelligent project and work management software.



## Challenge

Wrike wanted to unify their sales process, speed up workflows, and gain deeper insight into every buyer interaction.

## Solution

Salesloft Revenue Orchestration Platform, powered in part by the context, summaries, and insights provided by Conversation Intelligence.

## Results (in just nine months):

- Created \$350K in sales tech stack savings through consolidation
- Helped sales managers become better coaches
- Built a culture of predictable sales excellence

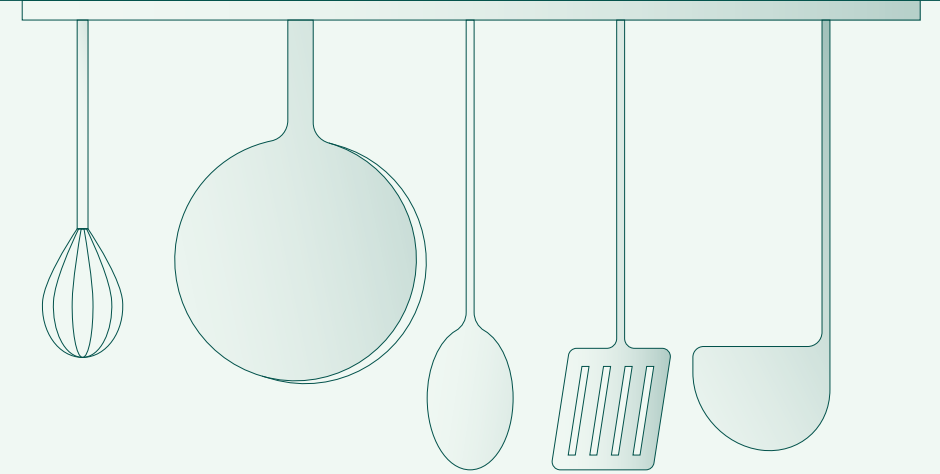


“

When you are working  
from Salesloft every day,  
**it becomes a single  
source of truth.”**

**Luke Devin,**  
an AE at Wrike

# Get cooking with Salesloft



**No matter how you  
combine the ingredients,**

there are countless Salesloft recipes to transform the way you do business. With Conversation Intelligence, every call becomes a source of actionable insight, helping you build pipeline, accelerate deals, sharpen coaching, and guide smarter strategic decisions.

[Talk to Sales](#)



# Put your wins on repeat with the leader in AI revenue orchestration.

Salesloft helps revenue teams prioritize and take action on what matters most — driving smarter sales execution, more qualified pipeline, and faster deal cycles. Thousands of the world's top revenue teams, like those at Google, 3M, IBM, Shopify, Square, and Cisco, drive more revenue with Salesloft.

## Salesloft.

