Eleven replies, seven meetings

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Fictional document — demonstration example

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Fictional document, produced for demonstration. **The CRM is updated on all eleven: status, note, next action and date.** Nothing for the salespeople to re-enter.

What came in and what was done

Nature	Count	Agent's action	State
Interested — slot accepted	**4**	**Booked in the calendar, invitation with history**	**Confirmed**
Interested — other dates requested	3	Three new slots offered	Awaiting reply
Questions before going further	2	**Answered from your documents**	Meeting booked on one
Refusals	2	**Sequence stopped, reason recorded**	One to revisit in January

What the salesperson receives in their calendar

Field	Content
Subject	Discovery meeting — 20 min
Attachment	**Dated fact, exchange history, question asked by the prospect**
Note	What triggered the reply — useful for opening the conversation

CRM fields updated automatically

Field	Value carried	Source
Status	Meeting booked / To follow up / Refusal	Nature of the reply
Next action and date	**Always filled in**	Sequence rule
Reason for refusal	Free text taken from the reply	**The prospect's words, not an interpretation**
Address origin	Page and date consulted	Targeted list

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