AIのCRM

Conversational CRM

What happens when you tell the CRM what happened · 2026-11-09

A conversational CRM is a CRM you update by describing what happened, in your own words, instead of filling in fields. You say "met Sofia at Nordic Supply, they will trial the premium package from January, send the pricing by Friday" and the CRM logs the meeting, updates the deal, links Sofia as a contact and adds Friday's task. The conversation is the interface; the database is behind it.

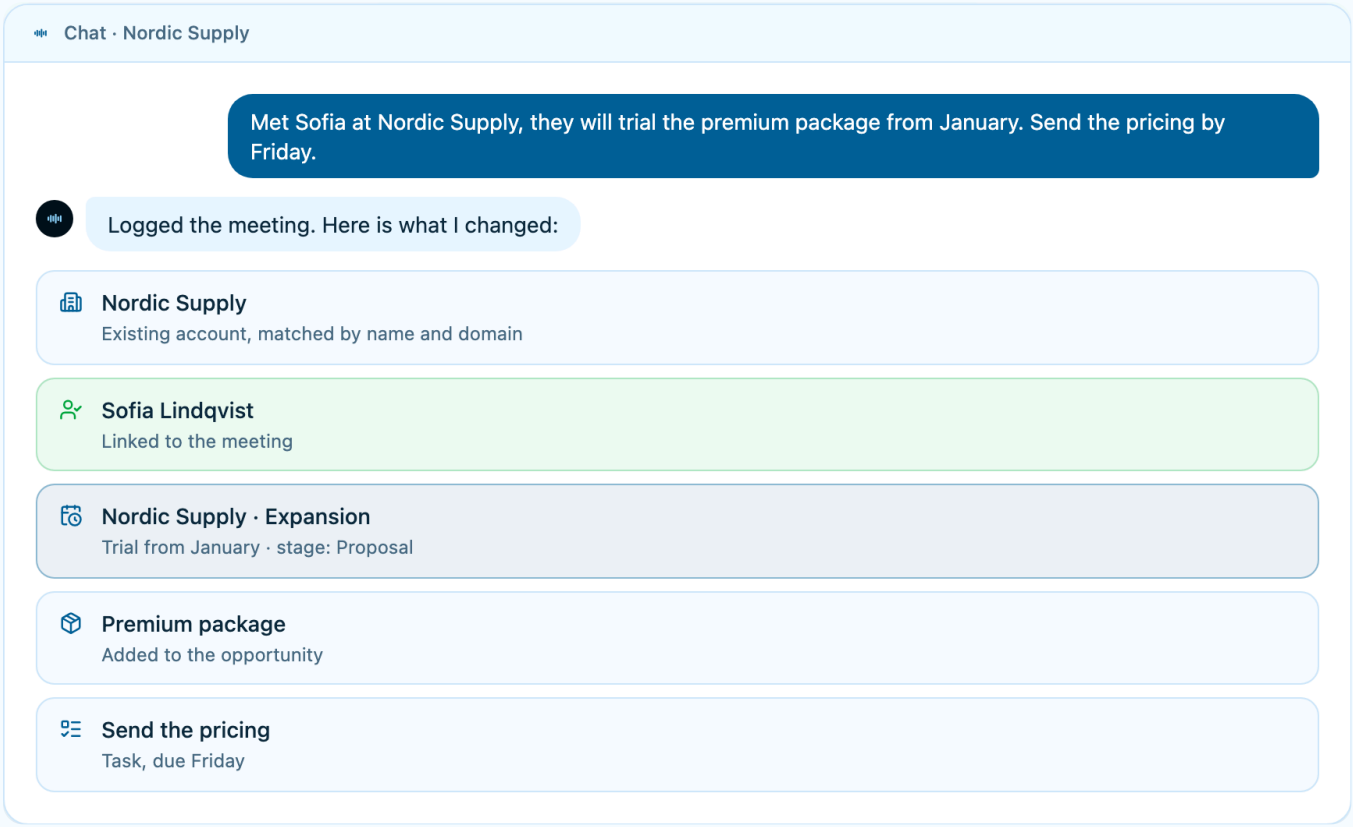
The term is used for two different things. Some products call themselves conversational because they handle customer conversations: WhatsApp, chat widgets, support inboxes. This guide is about the other meaning: the salesperson's conversation with the CRM itself.

> **In short.** One sentence does five things: the records are found, the deal is picked, what changed is updated, the reply lists every change, and a question is asked only when the sentence could mean two things. Trust comes from asking, not guessing. Typing and talking are the same conversation, and email joins it, kept apart from what a person said.

1 How one update works

Take the sentence above. Here is what AinoCRM does with it, in order:

1. **Finds the records.** "Nordic Supply" is matched to an existing account, or created if it is new, with a quick check that it is the same company and not a namesake. "Sofia" is matched to a contact at that account.
2. **Picks the deal.** If the account has one open opportunity, that is the one. If there are several, Aino asks which one, with the options as buttons.
3. **Updates what changed.** A trial from January moves the deal forward if the stage requirements are met; the premium package is attached as the product; the mention of pricing becomes a task due Friday.
4. **Tells you what it did.** The reply lists each change. Nothing is changed quietly, and a correction ("no, the trial starts in February") is one more sentence.
5. **Asks when it is unsure.** If the sentence could mean two things, Aino asks one short question rather than guessing.

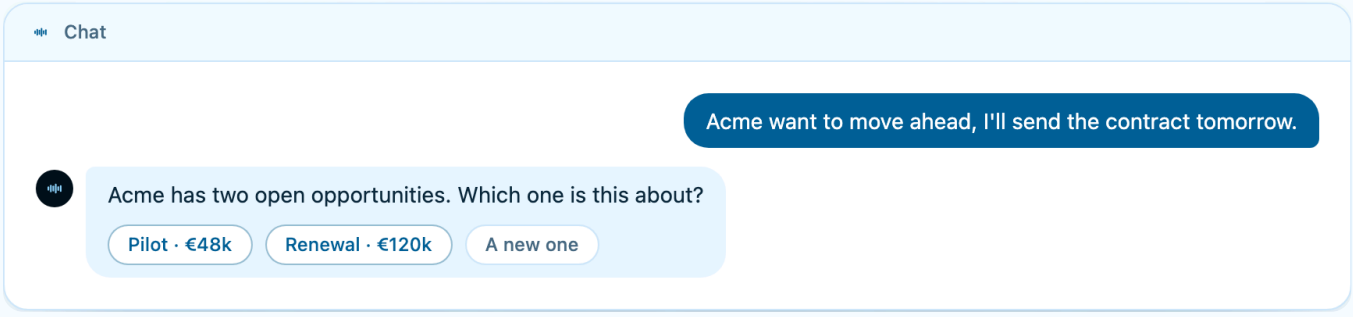


What the reply to that sentence looks like: every change named, nothing hidden.

The same happens with an email you forward, or with a connected mailbox, except that information from email is marked as such, and only fills in what was empty.

2 What it gets right, and where it asks

Matching a company name, a person and a deal from one sentence works almost always when the records exist. The cases that need a question are predictable: a new company with a common name, two open deals with the same customer, a number that could be a deal value or a quantity. A good conversational CRM asks in those cases and remembers the answer. A bad one guesses, and the team stops trusting it within a week.



The question comes with the answers as buttons, so settling it is one tap.

What it changes

Logging takes the time it takes to say what happened.

3 Typing or talking

Chat is the baseline: every update can be typed, from the web app or the phone. Voice is the same conversation out loud: you debrief on the way to the car, Aino does the CRM work while you speak and answers back. The voice guide covers how a call works and when it is the better choice.

4 What changes for the team

- **Salespeople** stop doing CRM work as a separate activity.
- **Leaders** stop chasing updates before a pipeline review, because the pipeline was updated when the meeting ended.
- **Data** gets better instead of worse over time. Every record shows whether a fact was said by a person, suggested by the AI or taken from an email.

5 Questions to ask before you choose

- Does it ask when unsure, or guess?
- Does it show every change it made?
- Does it create contacts and accounts, or only update existing ones?
- Does it work from email too, and keep email-sourced facts apart from confirmed ones?
- Does it work out loud, on a phone, hands-free?

AinoCRM answers yes to each.

> ### Read more
>
> The voice guide: **ainocrm.com/guides/voice-to-crm**. How a team moves over from a form-based CRM: **docs.ainocrm.com/setup**. Email that files itself: **ainocrm.com/product/gmail**. Try it free for 14 days, up to five people, no card: **app.ainocrm.com/signup**.