AIのCRM

What is an AI CRM?

A plain definition, and how to tell one from a CRM with AI features · 2026-11-09

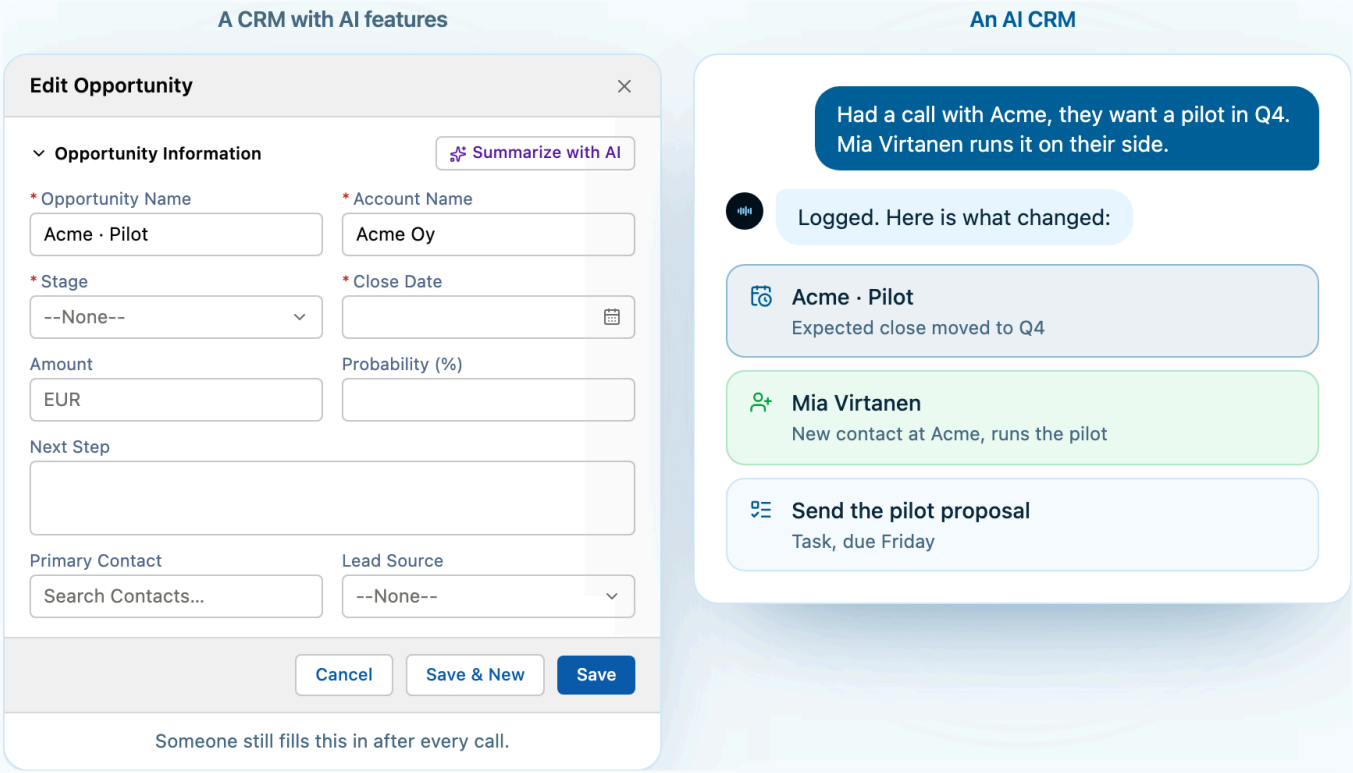
An AI CRM is a customer relationship management system in which AI does the work people used to do by hand: logging calls and emails, keeping deal details current, noticing which deals need attention and saying what to do next. The test is simple. If a salesperson still has to open a record and type after every call, it is a CRM with AI features. If the record is updated from what the salesperson said or sent, it is an AI CRM.

> **In short.** Two kinds of product use the phrase: a classic CRM with AI added on top, and a CRM where the AI is how data gets in. The difference shows in the demo: if the update starts in a form, it is the first kind. Five questions tell them apart, listed in section 3.

1 The two kinds of "AI CRM"

Most products that use the phrase today are the first kind. The CRM is the same database and the same forms it was five years ago, and AI has been added on top: a summary of an account, a draft of an email, a chat box that answers questions about the pipeline. Useful, but the salesperson still owns the typing, so the data is still as patchy as before.

The second kind turns the order around. The salesperson talks or forwards an email, and the AI works out which account, contact and deal it concerns, creates what is new, updates what changed and adds the follow-up. The CRM is built from what the team already says and sends, instead of from what they can be made to type.

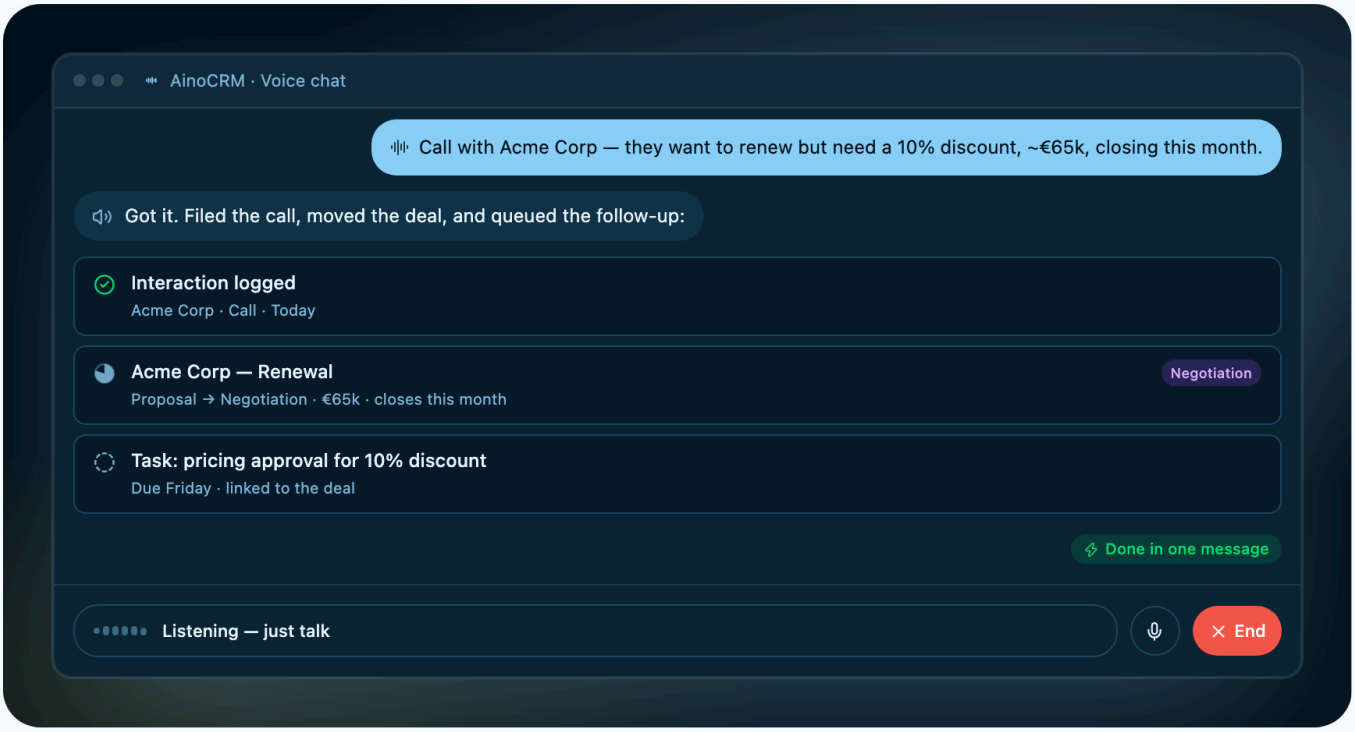


Left: the record form every rep knows, with an AI button on top. Right: one sentence, and the records come out of it.

AinoCRM is the second kind. Deals are updated by talking to Aino, the assistant inside it, or from an email that was filed, and every record shows where its information came from. A pen beside each field fixes a detail by hand, under the same rules.

2 What an AI CRM does day to day

- **Logging.** "Had a call with Acme, they want a pilot in Q4" becomes a logged call, a deal update, a new contact if one was named and a task for the follow-up.
- **Keeping data current.** Deal value, close date, decision-maker and products are filled in as they come up in conversation or email, not in a quarterly clean-up.
- **Filing email.** A connected mailbox files deal-relevant messages against the right opportunity on its own, labeled as coming from email.
- **Coaching.** Each open deal is checked against the company's own sales process, so "what should I do next" always has an answer.
- **Forecasting.** Because the data is current, the forecast is too. A leader sees what closes, what slips and what is at risk without chasing anyone for updates.
- **Routine work.** Recurring checks ("every Monday, chase my deals that have gone quiet for two weeks") are described in plain words and then run on their own.



A debrief in AinoCRM: the sentence, and the records it produced.

The one rule

An AI that changes the pipeline quietly is worse than no AI at all.

Every change should be visible, marked as the AI's, and come with its reason.

3 What to look for

These five questions separate the two kinds in a single demo:

1. **Where does data come from?** Ask the vendor to show a deal being updated without anyone opening a form. If the demo starts in a form, it is the first kind.
2. **Can you see what the AI did?** Every change the AI makes should be visible and marked as such, with the reason. A change you cannot trace is a change you cannot trust.
3. **Does it enforce your process, or just describe it?** A stage exit criterion a rep can tick without the data behind it is a checkbox. Look for requirements that are satisfied by data.
4. **Does it work out loud?** Salespeople debrief in cars and between meetings. If the only way in is typing, logging will still slip.
5. **What happens to your data?** Where it is stored, whether the AI provider may train on it and what a day of AI usage costs should be on the pricing page, not in a sales call.

4 Where AinoCRM fits

AinoCRM is an AI CRM for B2B sales teams: the team talks to it, in chat or on a voice call, and forwards or connects email. It arrives with a sales process, requirements per stage and a forecast in place, and it is set up in a conversation rather than a project.

Read more

The questions above, answered for AinoCRM: **ainocrm.com/faq**. How it compares with HubSpot, Salesforce, Attio, Zero and Pipedrive: **ainocrm.com/compare**. More guides: **ainocrm.com/guides**. Try it free for 14 days, up to five people, no card: **app.ainocrm.com/signup**.