CONVERSATION INTELLIGENCE · 2026

AI Call Transcription, Summaries and CRM Notes

Most AI note takers are meeting bots. They join video calls and quietly fail on ordinary phone calls, because there is no meeting for a bot to join.

> The gap is architectural, not a feature difference. A meeting bot needs a meeting. A phone native provider transcribes **at the network layer**, so every inbound, outbound and mobile call is captured, summarised and logged without anyone remembering to hit record. The payoff is less admin, faster follow up and searchable call history. The catch is doing it lawfully.

The blind spot, and what it costs you

	Meeting bot	Phone native
Video calls	Captured	Captured
Ordinary inbound calls	Missed. No meeting exists to join.	Captured
Outbound calls from a mobile	Missed	Captured, when the call goes through the platform
Who has to remember something	Someone must invite the bot	Nobody
What your call history looks like	The calls people remembered to record	Every call

What lands in your CRM automatically

CRM	What appears	Who it suits
Salesforce	Call logged to the contact or opportunity, summary in the activity, follow up tasks	Pipeline driven sales teams tracking every touch on a deal
HubSpot	Timeline entry with summary, associated to the deal, follow up task	Marketing to sales handover and lifecycle reporting
Zoho	Activity note on the lead or contact with summary and next steps	Cost conscious SMBs running the full suite
Xero, Monday and 1000+ others	Call context routed to the right record or board	Ops, finance and project teams that need outcomes in context

Consent and compliance in Australia

Recording and listening device law is state and territory based, so the workable standard is a **clear recorded line notice at the start of every recorded call, on every line**, including the AI answered path, which is regularly overlooked because it does not feel like a recorded call. One organisation wide notification standard is simpler and errs in the right direction. Recordings and transcripts are personal information, so set retention deliberately against how long disputes take to surface in your industry, restrict who can retrieve a call by role, and be able to delete on request. General guidance, not legal advice.

Rolling it out without the mess

1. Turn on transcription before summaries. Read raw transcripts for a week so you learn where the accuracy actually sits.
2. Load a custom vocabulary of your suburbs, product names and staff names. Ten minutes, and it prevents most of the errors that make people stop trusting the notes.
3. Pick one CRM object and one workflow. Auto notes on every record at once produces noise nobody reads.
4. Check ten transcripts by hand each week for the first month. Tedious, and the single practice that decides whether staff trust the output.
5. Update the recorded line notice and the privacy policy before go live, not after somebody asks.

What teams actually use it for

- Answering "what did we agree?" in ten seconds instead of reconstructing it from memory.
- Handover, so a person going on leave leaves a legible history rather than a set of assumptions.
- Coaching from real calls rather than remembered ones.
- Finding every call that mentioned a product, a competitor or a complaint.

This is the summary. The guide has the detail.

The full article explains the architecture gap, the call to CRM workflow, the per platform detail and the compliance steps. Call **1300 663 222** or visit **vocphone.com/about/contact-us**.