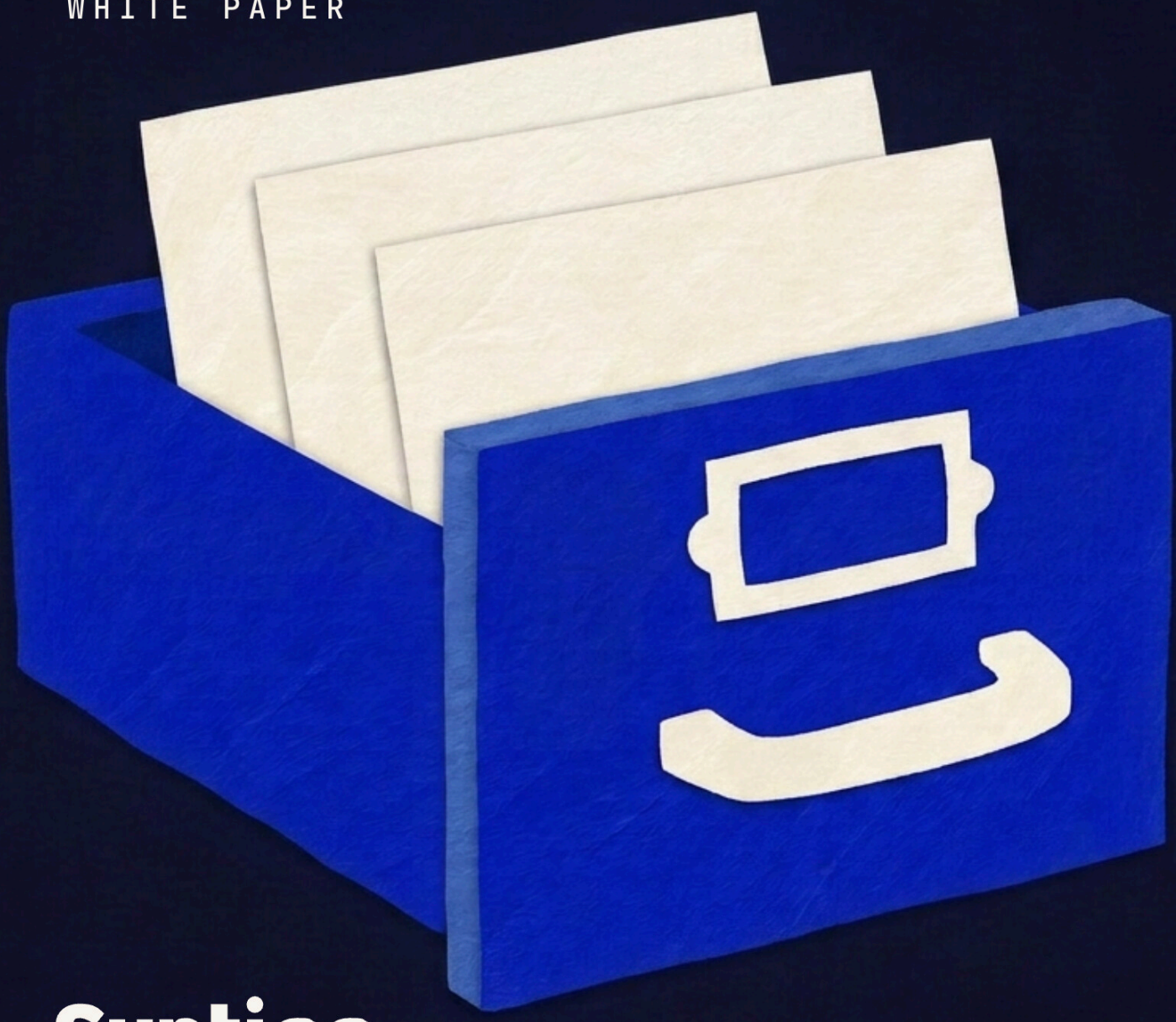
The Self-Maintaining CRM

WHITE PAPER



Syntiqa

In brief

- Your CRM goes out of date the moment a customer changes plan in an email. Until someone carries that change across, your forecast runs on the old version.
- Syntiqa reads the customer interactions your team captures and updates Salesforce, HubSpot or Microsoft Dynamics 365 in their own fields, under rules your team writes.
- When Syntiqa is not sure, it flags the item for a person to review, with an alert. Your rules name the fields that stay with people.
- You can start with 20 minutes on your own CRM: your stages, your required fields, and what Syntiqa would write back.

Where to start reading

If you	Read chapters
Run sales or a sales team	1, 5 and 10
Run revenue operations or the CRM	2, 3, 4, 6 and 7
Own IT or data governance	6, 8 and 9

Each chapter stands on its own. Several return to the same example.

One example: a buyer delays a factory trial

The names are invented. A packaging machinery maker is selling to one customer for two plants, North and South. Each plant has its own open deal in the CRM. The North deal shows a close date in October and the next step "Confirm factory trial schedule". Marta coordinates the technical work at the North plant.

Then the buyer writes:

> From the buyer, to your account executive
>
> About the North plant project: the factory trial is delayed. Marta will confirm the new date for the technical review. We have no agreed delivery date.

Chapter 1

A CRM kept by hand drifts from what your buyers wrote

Does your forecast rely on what your sellers remembered to log?

When a buyer moves a date by email, how long until the CRM shows it?

Does each seller fill in your MEDDPICC or BANT fields the same way?

Your buyer's email reaches one seller, and your CRM still shows October. It is working as designed: the fact that changed sits in an inbox, and a person has to carry it across.

That person is usually already on the next call, so the gap shows up later.

- **In the forecast meeting.** October is in the number. Your sales leader asks how sure the team is about the next six months, and the meeting turns into rebuilding deals from memory.
- **In a handover.** The seller moves to another territory. Their successor reads October and a next step that no longer exists. When the deal is won, customer success inherits promises nobody wrote down.
- **In coaching.** A manager who coaches from the CRM coaches the deal as it was a month ago, or as the seller chose to tell it.
- **In performance reviews.** Activity reports count what was logged. A seller who logs every email looks busier than one who spent the week with customers.

This paper has no return-on-investment table. You can count the gap on your own pipeline.

Count it on your own pipeline

Before your next forecast meeting, take your ten largest open deals and ask three questions of each.

1. When did the close date last change, and which customer message was that change based on?
2. Do the stage, next step and close date agree with the last customer email or call?
3. If the owner left tomorrow, could a colleague run the deal from the CRM alone?

Every "no" is a deal your forecast carries on someone's memory. That count is your starting point, and it comes from your own pipeline.

Ask what your current tools change

- Does your activity capture change the next step or the close date, or only log the email?
- Do your workflow rules act on what a customer wrote, or only when someone edits a field?
- Does your meeting assistant write to the deal, or hand the seller a summary to type in?
- Do your required fields hold what the customer said, or the value that let the seller save the record?
- Does your forecasting tool read the same fields that went stale after the buyer's email?

Wherever the answer is "a person still types it", you have found the gap this paper is about.

Ask who will maintain a home-made version

Revenue operations teams often ask whether they could build this with a language model and a few webhooks. If your team is considering it, ask whoever would own it these five questions.

1. When a customer has two open deals, which one does the script update?
2. When an email gives no date, does the script leave the field blank or fill in a guess?
3. When the script writes a field, which existing workflows fire, and what do they write back?
4. When someone adds a required field or changes a stage, what breaks, and who finds out?
5. Where does customer email travel on its way to the model, and who can show that route to your IT team?

Whoever answers these five also has to keep the answers true as your CRM changes.

Chapter 2

Four parties keep your CRM up to date

A CRM stays accurate when each party has one clear job.

- **Your sales team** works with customers and makes the commercial calls. Email capture runs in the background. Sellers start voice-note and meeting capture themselves, and can still edit the CRM directly.
- **Syntiqa** does the routine CRM entry. It reads the interaction, works out which account and deal it concerns, and makes the change your rules allow. It writes values into the fields your team already uses, instead of pasting summaries.
- **Your data rules** decide what Syntiqa may do: which records and fields it may change, which stages need which evidence, and what goes to a person. Your team writes them. Chapter 4 covers them.
- **Your CRM** stays the one place everyone works from: Salesforce, HubSpot or Microsoft Dynamics 365, configured as it is today.

Some actions should stay with people whatever the rules say: deleting records, reassigning owners, committing the forecast. Chapter 6 helps you list them. In the working session of chapter 10, we show what Syntiqa does today on each of these points, known limits included.

Chapter 3

Syntiqa writes what your rules allow, and flags what it is not sure of

For each interaction, Syntiqa works out which account and deal it concerns, what has changed against what the CRM already holds, and whether your rules allow that change. Where all three are clear, it updates the CRM. Where one is not, it flags the item for a person to review, with an alert.

Take the buyer's email and four rules a sales team might write:

- Update the next step when a customer message states it.
- Leave the close date to the forecast owner.
- Move stages by hand only.
- Create no deal from an inbound email.

What lands in the CRM under those rules

An illustration of the behaviour the rules ask for, with invented names. It is not a record from a customer.

Field	Before the email	After, under these rules
North deal, next step	Confirm factory trial schedule	Factory trial delayed. Marta to confirm the date of the technical review.
North deal, close date	October	October, flagged for review: the customer no longer supports it
North deal, stage	Unchanged	Unchanged: stages move by hand
North deal, activity	None	The buyer's email, logged on the deal
South deal	Unchanged	Unchanged

Now remove the plant's name from the email. Both deals fit. Your rules should say what happens then. The safe rule is to leave both deals alone and flag the email for a person.

A system that must always write will sometimes guess, and a guessed close date is harder to catch than an old one, because nobody knows to check it.

In the working session, we run your own examples and show what Syntiqa writes and flags today, known limits included. Rules and alerts reduce errors; they do not guarantee an accurate CRM.

Chapter 4

Your operating manual sets the rules, and your team owns it

The operating manual is the set of rules Syntiqa follows for your company. It says which records and fields Syntiqa may create or update, which evidence a deal needs before it moves to the next stage, and which cases go to a person instead of being written.

Your rules follow your sales method and your CRM as they are. In our worked example, a complete MEDDPICC set-up takes about 30 lines of configuration. We can walk you through it.

Setting the rules up is part of onboarding, together with mapping your CRM and connecting it. When your process changes, we update the rules with you. A settings screen for your administrator is in staging, our test environment.

Syntiqa writes free text such as deal descriptions and summaries in English, Spanish, German or French. List values such as stages stay in your CRM's own language.

Chapter 5

See what changes at each desk

Here is the same email, seen from four desks.

Sellers

After the buyer's email, a seller has to remember to open the North deal, rewrite the next step, decide whether the close date should move, and log the email, usually between two calls. If the buyer names a new decision-maker on a call, that name can stay in a notebook.

With Syntiqa, the next step can be updated from the email under your rules, and the close date is flagged for review. Your seller checks the change and gets back to the customer.

Sales leaders and managers

Your forecast meeting asks each seller to talk through deals the CRM should already explain, and October stays in the number until someone speaks up. Coaching starts from what the seller remembers.

Once more of the CRM follows the last customer message, your sales leader can start the meeting from the alerts Syntiqa raised.

Revenue operations and CRM administrators

Their week goes on reactive cleaning: chasing missing fields, moving activities logged on the wrong deal, answering tickets after a forecast goes wrong. Each new required field is one more thing sellers forget.

Their work can move to writing and maintaining the rules, and to handling what gets flagged.

IT and data governance

Their first question is often which tools sellers already paste customer email into, and who reviewed them.

Syntiqa gives them one supplier, a draft data processing agreement they can read before signing, and a set of rules your team writes. Chapter 8 quotes the draft.

Chapter 6

Decide who does what before anything runs on its own

Before any automation, sit your sales leader and your CRM administrator down together with one workflow, and place each task in one of four boxes.

Box	Examples to start from
Automatic	Log a customer email on the right deal. Update the next step when the message states it.
Automatic, within your rules	Move a stage when the evidence your rules require is present. Create a deal only from the channels you allow.
Flagged for a person	An email that could belong to two deals. A customer contradicting an earlier message. A shared email domain.
People only	Delete records. Reassign owners. Commit the forecast. Agree commercial terms.

These are examples to start the discussion. Your boxes will differ. Name who handles the flagged items before you start, because flags nobody owns pile up.

Chapter 7

Decide which CRM fields people keep

When the CRM agrees with the last customer message, your team can plan from it. Forecasts, handovers and coaching then start from the same facts. Whatever your sellers type, or Syntiqa writes, is what your forecast reads.

Three decisions in your operating manual set it:

1. Which fields Syntiqa may write.
2. Which fields stay with people, for example the close date, the forecast category and the amount.
3. When Syntiqa must flag instead of writing.

If the customer has given no delivery date, the CRM should show none until they do, and your rules should say so.

No system that writes to a CRM is free of errors, Syntiqa included. Syntiqa is designed to leave the fields your rules protect alone. In the working session, we show what it does today, known limits included.

Chapter 8

Check our draft security terms with your IT team before you sign

Syntiqa is a brand of Sophie Datagen Ltd. The Sophie Datagen Ltd Trust Center lists an ISO 27001:2022 certification; the audit report and certificate are available on request. [1]

Our draft data processing agreement provides the following. [2] Check each term in the version you sign.

- Customer personal data and confidential information are never used to train, retrain or fine-tune any foundational or third-party large language model.
- Every third-party AI service is used under a zero data retention agreement.
- Data is encrypted with TLS 1.2 or higher in transit and AES-256 at rest.
- Each customer's workloads are separated, on private nodes in a managed Kubernetes environment inside a non-public network.
- A breach is notified within 48 hours, and a new subprocessor is announced 15 days ahead.

Our main infrastructure runs in Europe. The full list of subprocessors is in the data processing agreement. [2]

SOC 2 Type II is in progress. It is not yet listed on our Trust Center.

Chapter 9

Check which capabilities run today

Available means running in production today. In staging means our test environment. Planned capabilities carry no date.

Capability	State
Email capture, running in the background	Available
Voice notes, started by the seller	Available
Recorded-meeting capture, started by the seller	Available
Updates to Salesforce, HubSpot and Microsoft Dynamics 365, in native fields	Available. Not every feature is the same on each CRM: ask which one a demo shows.
Free text written in English, Spanish, German or French	Available
Items Syntiqa is not sure of, flagged for a person with an alert	Available
AI notetaker that joins meetings	Early access
Calls on a recorded phone line	Early access
Settings screen for your administrator	In staging
Public API, MCP server, admin command line	Planned
Deal-health scoring	Planned

Chapter 10

Start with 20 minutes on your own CRM

1 **A 20-minute working session**

With your revenue operations lead, we walk through your pipeline stages and required fields, connect a test sandbox or review sample deals, and show what Syntiqa would write back under your rules.

2 **Onboarding, in less than two weeks**

We map your CRM, connect it, and write the first version of your operating manual with your team.

3 **One workflow first**

We suggest starting with the workflow that causes the most re-typing today, and checking what Syntiqa writes and flags.

4 **Then wider**

Your team adds channels, fields and rules as the flagged items show where the manual needs work.

Bring two things if you have them: the ten-deal count from chapter 1, and a first draft of the four boxes from chapter 6.

Prices are given in a written proposal. Implementation is a separate line on every proposal.

Book a demo

Go to syntiqa.ai and bring your pipeline stages and required fields to the session.

Sources

1. Syntiqa Trust Center, Sophie Datagen Ltd, trust.syntiqa.ai, checked 25 September 2026.
2. Data processing agreement, version 2.1, 2026. A draft negotiated with one prospect, not a signed contract.

This edition describes Syntiqa as of November 2026. Capabilities marked planned may change. Names in the example are invented.