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— THE OPPORTUNITY NO ONE IS DISCUSSING

# The Greatest Business Opportunity AI Has Opened Up, But No One Is Talking About

*AI didn't make call notes possible. It made them frictionless. That distinction changes everything — for the salesperson, for the leader, and for the entire organization.*

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**2–3**

MIN PER  
MEETING

**100%**

WRITTEN  
BY CLAUDE

**100**

MEETINGS  
PER WEEK

**1**

MONDAY  
QUERY

**0**

HOURS  
TYPING

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**Gui Costin**

CEO & Founder, Dakota · April 2025

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Every week, investment sales teams walk out of hundreds of client meetings carrying the most valuable market intelligence their firm will ever have access to. Within hours, almost all of it is gone. AI just eliminated every reason that has to keep happening.

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Let me be precise about something, because it matters: AI did not make call notes possible. Salespeople have always been capable of writing call notes. The problem was never capability. The problem was friction — the gap between knowing what happened in a meeting and producing a clean, structured, shareable record of it was just large enough that most people, most of the time, let it go.

What AI did is eliminate that friction entirely. And when you remove friction from a behavior that compounds in value over time, you do not get a small improvement. You get a transformation.

## Three Minutes. That Is the Entire Ask.

Here is what the new workflow looks like in practice:

### 01 Walk out of the meeting

You are still in the lobby. The conversation is completely fresh. This is the highest-value moment — don't let it pass.

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### 02 Open Claude. Dictate for two to three minutes.

Talk naturally. Who was there, what was discussed, what products came up, what concerns were raised, what follow-up is needed, and what your team has to do. **No typing. No formatting. No grammar required.** Just tell Claude what happened.

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### 03 Claude produces a polished, structured call note

Every attendee, every topic, every follow-up — written clearly, professionally, and completely. The salesperson never has to be a good writer. They just have to be a good observer.

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### 04 That note goes into a system of record — Salesforce, Slack, or both

The moment it lands there, **it becomes searchable.** It is no longer just a memory in one person's head. It is a permanent, retrievable, queryable piece of organizational intelligence.

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### 05 Repeat — across every rep, every meeting, every week

Now the intelligence compounds. Every note that enters the system makes the whole more powerful than the sum of its parts.

That is the entire workflow. Two to three minutes of talking per meeting. No new technology to learn. No Salesforce login from a parking garage. No hour-long writing session at the hotel. Just an app and a voice.

## The Moment It Enters a System, Everything Changes

### THE CRITICAL DISTINCTION

*A note that lives in someone's head is a memory. A note that lives in Salesforce or Slack is **searchable intelligence**. That single step — from spoken word to system of record — is where the entire opportunity is unlocked.*

Here is why searchability is the breakthrough. When a call note exists only in someone's memory, or even in a private document, it can only inform one person's decisions. The moment it enters a shared system of record, it becomes available to the entire organization — leadership, product, marketing, portfolio management — and critically, it becomes something that AI can analyze at scale.

### THE JOURNEY FROM CONVERSATION TO INTELLIGENCE

<b>Salesperson dictates</b> Two to three minutes in the lobby, immediately after the meeting	<b>FRictionLESS</b>
<b>Claude writes the note</b> Polished, structured, professionally written — zero editing required	<b>INSTANT</b>
<b>Note enters Salesforce or Slack</b> Permanently stored, fully searchable, visible to the right people	<b>SEARCHABLE</b>
<b>Leadership queries Claude across all notes</b> Trends, patterns, and insights synthesized across the entire team's activity	<b>INTELLIGENCE</b>

# What the Sales Leader Gets to Do Next

This is the part of the story that almost no one is telling — and it is the most important part.

If your sales team does 100 meetings in a week and every one of those meetings produces a Claude-written call note that flows into your system of record, then by Friday afternoon you have something genuinely remarkable: 100 structured, searchable records of what your market told you this week.

And here is what that makes possible:

## MONDAY MORNING — SALES LEADER TO CLAUDE

HEAD OF SALES · MONDAY 8:14AM

*"Claude, based on all of last week's call notes across the team, what were the most common themes, product questions, and concerns that came up? What objections surfaced most frequently? Which relationships are showing the most momentum, and where do we have follow-up at risk of falling through?"*

CLAUDE · MONDAY 8:14AM

*Based on 94 call notes from last week across 12 territories: Evergreen fund structures were the most frequently raised topic (41 meetings). Fee transparency in sub-advisory was a recurring concern, particularly in Canada (18 mentions). Three relationships flagged as high-momentum have outstanding follow-up items due this week. Two product inquiries appear across multiple regions simultaneously — possible signal of a broader market shift...*

That is not a hypothetical. That is what becomes possible when two to three minutes of dictation per meeting feeds a shared system of record at scale. The individual salesperson wins because their follow-up is organized. The sales leader wins because they can see their entire market in a single query. And the organization wins because the intelligence is no longer locked in anyone's head — it is a shared, compounding asset.

# The Scale That Changes the Conversation

## 2–3

### MINUTES PER MEETING

The total time investment per salesperson, per meeting.

## 100%

### WRITTEN BY CLAUDE

No writing skill required — only the ability to speak.

## 100

### MEETINGS PER WEEK

One query to Claude on Monday morning synthesizes what your market said last week.

This is not a marginal efficiency gain. This is not a productivity tweak. This is what it looks like when AI removes the last obstacle between a sales organization and the intelligence it has been generating for decades — and finally capturing none of.

The conversations were always happening. The intelligence was always being created. What was missing was a frictionless path from the conference room to the system of record. That path now exists. It is two to three minutes long. And it fits in the lobby of any building your team walks out of, every single day.

*The greatest intelligence asset in your firm is already being generated in every client meeting your team holds. **AI just made it frictionless to capture, searchable to query, and powerful enough to transform how your entire organization learns.** The only question is whether your team will take the two minutes to unlock it.*

#### THE LEADER'S MONDAY MORNING

*100 meetings. 100 Claude-written notes. One query. **A complete picture of what your market told you last week** — synthesized and ready to act on before 9am.*

**See what this looks like for your sales team**

Schedule a working session with Dakota

**REQUEST A DEMO**