Coldforge · CRM Handoff Agent: Setup Guide

Two pages. About an afternoon. Free.

1. What you need

- A CRM with API access or an MCP connector. You need read access to deals, notes and contacts.
- An AI agent or automation tool, such as n8n.
- A source for notes and email: your inbox, call-note tool or the CRM's activity log.
- One person who approves every brief. Usually the account owner.

Keep API keys in your tool's credential store. Never paste them into a prompt.

2. Set the trigger

1. In your CRM, find the event for a deal stage change. This is usually a webhook or an API poll.
2. Filter it to one stage: Closed-Won.
3. Point it at your automation tool. In n8n, use a Webhook node or a scheduled poll.
4. Pass only the deal ID. The agent fetches the rest.

3. What the agent reads

- **Deal record:** account, value, products, close date, owner.
- **Call notes:** discovery and closing calls.
- **Email thread:** the last messages with the buyer.
- **Commitments:** anything promised, such as dates, discounts, integrations or training.

4. The brief template

```
ACCOUNT:      name, main contact, billing contact, owner
WHY THEY BOUGHT: the problem, in their words
PROMISED:     each commitment, with who and when
TO CONFIRM:   items the owner must check
MISSING:      fields that are blank or unclear
```

5. Copy-paste agent instructions

```
You draft a customer success handoff brief for one Closed-Won deal.
Use only the deal record, call notes, email thread and commitments provided.
Fill the template: ACCOUNT, WHY THEY BOUGHT, PROMISED, TO CONFIRM, MISSING.
Rules:
- Draft only. Never send anything to the customer.
- Never guess. If a fact is not in the sources, write "MISSING" and list it.
- Quote commitments exactly and name the source (call, email, record).
- Flag conflicts between sources under TO CONFIRM.
- Do not include passwords, keys or payment details.
- End with: "Awaiting approval from the account owner."
```

6. Approval step

1. Send the draft to the account owner, not the customer.
2. The owner fills gaps and fixes errors.
3. The owner approves. Only then does it go to the success team.
4. Save the approved brief back to the deal record.

7. Test with a dry run

1. Pick one deal that closed last month.
2. Run the agent on it by hand, with sending turned off.
3. Compare the brief with what you know. Check every commitment.
4. Fix the prompt or field mapping. Run again.
5. Turn on the live trigger only after a clean run.

8. Common mistakes

- Triggering on every stage change, not just Closed-Won.
- Letting the agent email the customer directly.
- Accepting a brief with an empty MISSING section without checking.
- Reading the whole inbox instead of the deal's thread.
- Putting API keys in the prompt.

9. Compatibility

This works with any CRM that can do two things: - fire a webhook or allow polling when a deal stage changes, and - return deal, contact and note data through an API or MCP connector.

We have not certified any specific CRM. If you use a named CRM, check the vendor's API docs for stage-change webhooks and read scopes.

Fictional example: every name, number and system is invented.

```
ACCOUNT:   Northpine Freight. Contact: Dana Ruiz. Billing: MISSING. Owner: Sam Okafor.
WHY THEY BOUGHT: "Our follow-ups fall through after first calls."  (call, closing)
PROMISED:  Onboarding call within 5 business days (email). Two training seats (record).
TO CONFIRM: Start date differs: May 4 in email, May 11 in record.
MISSING:   Billing contact. Data-export format.
Awaiting approval from the account owner.
```

Want it done for you?

The **Kickoff Pack** (CAD $97 + applicable taxes) gives you the full handoff kit and kickoff plan, ready to use.
