xdge Solutions

Automated Meeting Intelligence & Client Follow-Up

Case Study: Alpine Consulting

Overview

Custom Workflows, Reports & Automation

xdge is a no-code automation and integration layer that sits on top of your existing tools, such as JIRA, Slack, and Confluence, to unify data, streamline reporting, and coordinate workflows without disrupting existing systems or requiring any code or tools to be implemented. The benefit is fast, accurate & flexible reporting and seamless knowledge aggregation, with minimal effort or training.

→ Complex Reporting
Automate multi-source reporting without manual data collation, saving engineering leaders and product managers valuable time while improving reporting accuracy.

→ Knowledge Integration
Break down tool silos by creating connections across platforms like JIRA, Slack, Confluence, and your CRM, establishing a unified knowledge ecosystem.

→ No-Code Deployment
Implement powerful automation without requiring engineering resources, allowing business and product teams to configure workflows independently.

By layering xdge on top of your existing technology stack, your team gains centralized intelligence to orchestrate, monitor, and report on engineering operations, maximizing ROI from current investments while minimizing disruption.

xdge

Automated Meeting Intelligence & Client Follow-Up

Use Case Overview

Consulting firms face the challenge of managing multiple client meetings while maintaining a professional, established presence. Alpine Consulting needed a systematic way to transcribe meetings, extract action items, and generate professional follow-up communications without dedicating hours to manual note-taking and email composition.

This workflow automates meeting intelligence by pulling from meeting bot transcripts, Slack discussions, and email threads. The system analyzes conversations across all channels, extracts key discussion points and commitments, and generates client-ready summaries and follow-up messages that reflect a professional consulting practice.

⚙ Workflow Summary

Objective: Automate meeting transcription analysis, extract action items and decisions, and generate professional client communications.

Source: Meeting bot transcripts, Slack conversations, Gmail threads → Unified client intelligence

Result

A comprehensive meeting intelligence system that eliminates manual note-taking and follow-up email composition. By automatically synthesizing information from meeting transcripts, Slack discussions, and email threads, Alpine Consulting maintains a professional, organized presence with clients while focusing consulting time on high-value strategic work rather than administrative tasks.

Clients consistently receive same-day follow-up communications with clear action items and meeting recaps, reinforcing Alpine's reputation for professionalism and responsiveness. The workflow ensures no commitments fall through the cracks and provides a searchable archive of all client interactions across channels.

Key Advantages

- Automates meeting transcription, action tracking, and client follow-ups
- Centralizes insights from meetings, Slack, and email into one unified view
- Ensures same-day, professional client summaries and next steps
- Reduces manual effort while preventing missed commitments and delays

xdge

Automated Meeting Intelligence & Client Follow-Up

📋 Step-by-Step Automation

1. Capture Meeting Intelligence
- Meeting bot joins client calls and generates accurate transcripts.
- Extracts structured data: participant names, topics, questions, responses, and deadlines; then identifies meeting type (discovery, update, strategy, or review).

2. Cross-Reference Communication Channels
- Searches Slack for prep, alignment, and follow-up threads.
- Scans Gmail for prior commitments, referenced exchanges, and open questions.
- Consolidates insights from all sources into a unified context.

3. Extract Action Items and Commitments
- Detects consultant and client deliverables, follow-ups, and decisions.
- Captures structured summaries including owner, due date, and context.
- Assigns deadlines automatically based on conversation cues.

4. Synthesize Key Decisions and Insights
- Summarizes major takeaways, strategic recommendations, and client concerns.
- Highlights dependencies and unresolved items requiring follow-up.

5. Generate Professional Meeting Summary
- Produces a structured document with:
  - Header (client name, date, participants, duration)
  - Objectives and key discussion points
  - Decisions made and action items with deadlines
  - Next steps and milestones
- Formats for quick review with clear sections and concise tone.

6. Draft Client Follow-Up Email
- Composes personalized recap with 2–3 key takeaways and deadlines.
- Includes attachments or references to the mentioned deliverables.
- Adapts tone to client relationship (formal or conversational).
- Confirms next meeting or milestone when applicable.

7. Deliver Outputs
- Saves summary to Google Drive in client-specific folder.
- Drafts email in Gmail for consultant approval.
- Creates calendar reminders for upcoming deadlines.
- Posts summary in relevant Slack channel, tagging stakeholders.

---

xdge

Automated Meeting Intelligence & Client Follow-Up

Input

Automated Meeting Intelligence & Client Follow-Up

Powered by Deep research

AI Instructions*

Create an automated workflow that transcribes client meetings, extracts key discussion points, and generates professional follow-up emails for Alpine Consulting. The system analyzes meeting transcripts, Slack discussions, and Gmail threads to ensure all commitments are captured and reflected in same-day summaries.

Step 1: Capture & Parse Meeting
- Join scheduled client meetings from the connected calendar.
- Generate transcripts with speaker IDs, timestamps, and key topics discussed.

Knowledge sources

App connectors*

Additional filters

Select timeline   Recent

People

Use this template   All

Automated Meeting Intelligence & Client Follow-Up

Fri, Oct 24, 2025, 04:53 PM

Executive Summary

The Alpine Demo Workflow successfully processed four client meeting transcripts from Google Drive, generati up communications for high-value consulting engagements. This comprehensive processing cycle demonstrat actionable insights, track commitments, and maintain client relationship momentum across diverse industry v services, retail, and healthcare.

Key Highlights
- 4 client meetings processed across 4 different companies
- $20.2 million in identified business value and cost savings opportunities
- 16 total action items tracked with clear accountability
- 100% follow-up email generation rate
- Multi-industry coverage demonstrating system versatility

Processing Summary

Meetings Processed
- Total Meetings: 4
- Total Duration: 4 hours 30 minutes (270 minutes)
- Date Range: November 1-4, 2025
- Unique Clients: 4
- Unique Participants: 10 (excluding consultant)

Detailed Results by Client

TechCorp Solutions - Discovery Call

Date: November 1, 2025, 10:00 AM - 11:00 AM PDT
Key Challenge: Trial-to-paid conversion rate of 8% (significantly below 15-20% industry benchmark)
Solution Identified: Comprehensive trial user journey audit and structured onboarding development
Critical Success Factor: Getting users to API integration "aha moment" within first 3-5 days
Timeline: Mid-November audit start for January completion (aligned with marketing push)
Next Steps: Proposal delivery by Friday, analytics access setup, follow-up meeting next week

FinanceGroup Capital - Strategy Session

Date: November 3, 2025, 9:00 AM - 10:30 AM PDT
Strategic Decision: Nashville recommended as primary expansion market over Austin/Denver
Competitive Advantage: 19 competitors vs 47 in Austin, 30% lower client acquisition costs
Investment Approved: Up to $750K for 6-month soft launch phase
Target Market: Newly wealthy individuals from healthcare and music industries
Next Steps: Full market analysis report by Friday, decision meeting next Wednesday
See More...

Recommendations for Next Steps

Immediate Priorities (Next 7 Days)
1. Proposal Generation: Complete and deliver TechCorp and FinanceGroup comprehensive reports by Friday
2. Meeting Coordination: Schedule follow-up meetings for TechCorp (next week) and FinanceGroup (Wednesday)
3. Board Preparation: Finalize HealthSystems board presentation by Thursday
4. Implementation Planning: Coordinate RetailCo Phoenix implementation logistics

Strategic Opportunities

1. Cross-Client Learning: Apply successful strategies across similar challenges (e.g., TechCorp's conversion optimization could inform other SaaS clients)
2. Implementation Support: Three clients (75%) require ongoing implementation support, representing significant engagement extension opportunities
3. Industry Expansion: Success across four different industries demonstrates system scalability for additional verticals

Output

Workflow Schedule: Runs automatically within 15 minutes after each client meeting ends.

Automation Level: Fully autonomous with optional consultant review before email send.

The xdge Layer: Automating Insight Across Platforms

The Alpine Consulting team works closely with xdge's product and customer success teams to refine meeting intelligence workflows and expand automation capabilities based on real client needs. This collaborative approach ensures the platform continues to evolve alongside Alpine's operational demands, from project tracking to client communication. Recent enhancements inspired by Alpine include automated meeting transcription for client calls, integrated Slack context sync for internal collaboration, and instant follow-up email generation, reinforcing xdge's commitment to building solutions grounded in real-world consulting workflows.

With xdge, you gain:

- Centralized, secure access to knowledge across your organization
- Automated reporting, compliance checks, and process monitoring
- Time back for your teams to focus on high-value work instead of repetitive tasks
- Avoid the need to build & maintain scripts & tools constantly
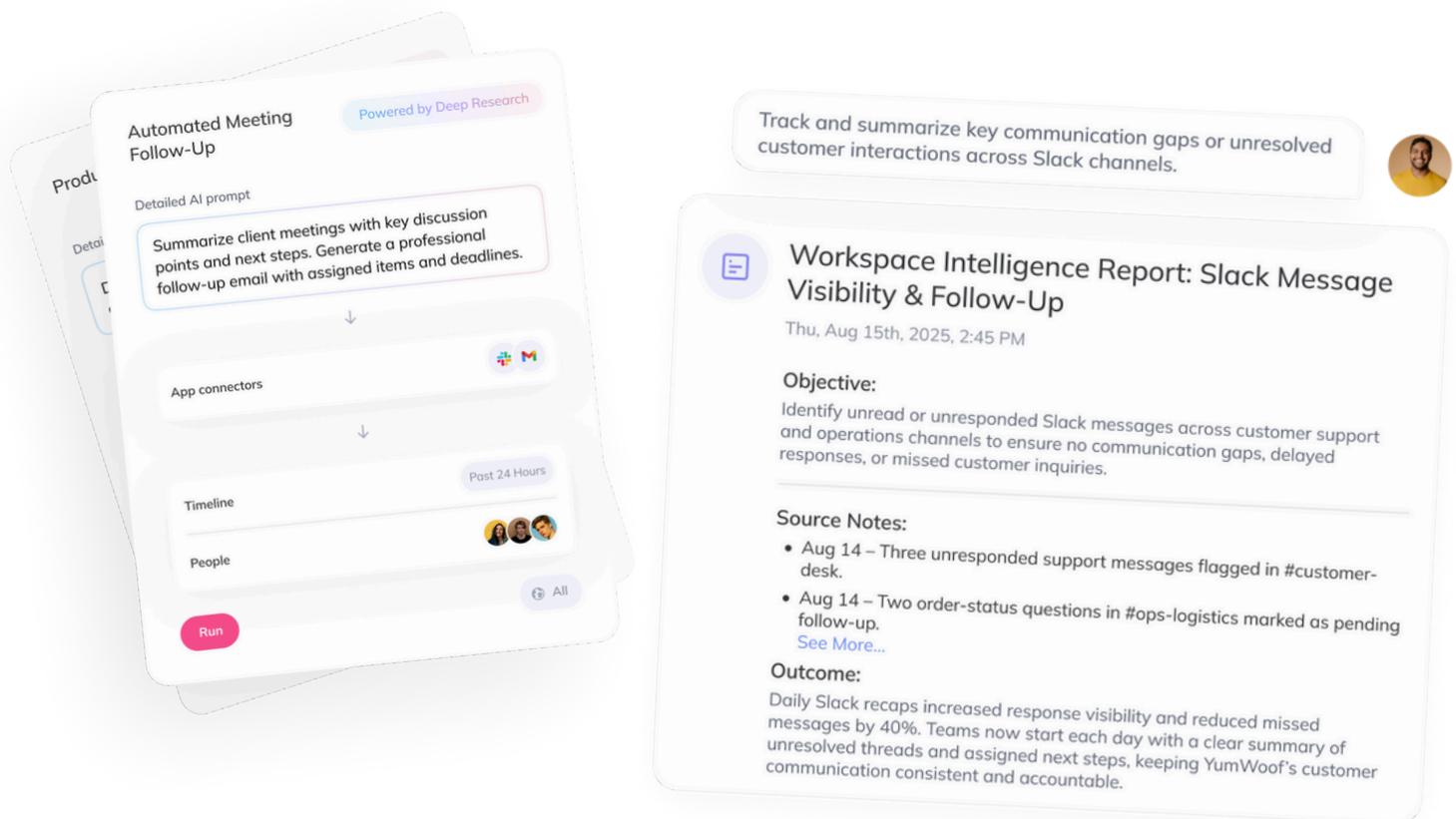
For further discussions and inquiries, please contact:

📞 1-855-2-XDGEAI   ✉ xdge.ai   📍 3031 Tisch Way #110PW, San Jose, CA

We look forward to building the future of enterprise technology together.

xdge

xdge

Welcome to the future that works for you