

Case studies



Insights

Eliminated manual deal reviews & speed up sales team enablement

Challenge

1406 Consulting needed a faster, more reliable way to create detailed client briefs from sales calls. Their sales-to-service handoff process was manual, time-consuming, and prone to inconsistency. This slowed down onboarding and created gaps between what was sold and what was delivered.

AskElephant solution

Matt used AskElephant to run a proof of concept by uploading two sales call recordings from Fathom, along with related documents. AskElephant automatically generated a complete client brief from the inputs, which Matt was able to review and send directly to HubSpot. The workflow was simple, fast, and required no technical setup.

AskElephant result

AskElephant reduced hours of manual work to just minutes, allowing the team to streamline their sales-to-service handoff with highly accurate, automated briefs. Matt described the results as “pretty amazing” and was impressed by how easily it integrated with their existing tools. The success of this test proved how AskElephant could scale across other clients and workflows at 1406 Consulting.