FATHOM

Elevate Sales Conversations with AI-Driven Insights

Capture SPICED from your team's calls and turn pipeline reviews into data-driven coaching

"Fathom turns messy, unstructured conversations into crisp, structured insights — the backbone of revenue architecture. **It shows what your reps are really doing, and helps you know where to invest, what to improve, and how to drive revenue forward."**
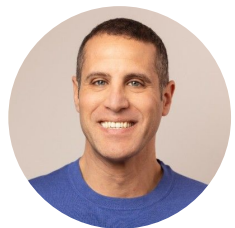
Roee Hartuv
Revenue Architect
Winning by Design

What does Fathom solve?

Most revenue teams still depend on manual, inconsistent note-taking and data entry, which slows down follow-through and weakens coaching. Fathom tackles this "last mile" by recording, transcribing, and summarizing sales conversations so information moves from calls into internal systems with far less friction, shifting team time from documentation to action. This helps reps stay engaged on calls with prospects, while generating consistent, high-quality insights for managers and leaders.

It's worth noting that call-intelligence is a crowded, fast-evolving space (from lightweight notetakers to full conversation-intelligence suites), so real differentiation comes from accuracy, tight workflow integration (e.g., CRM write-back), security/governance, and how well insights translate into coaching and deal execution; Fathom is strongest where those factors converge. It streamlines post-call workflows and surfaces actionable insights to help sales teams move faster, close deals more effectively, and spend more time selling.

Who is Fathom for?

Teams that run frequent customer calls—sales teams, managers, and leaders—who want consistent call outcomes, coaching at scale, and clearer visibility into pipeline health. That includes AEs, SDRs, and managers across B2B SaaS, services, and other meeting-heavy motions, plus adjacent groups (CS, AM, Support) that need a shared record of conversations. Fathom is a fit for orgs aiming to standardize methodology execution (e.g., SPICED/MEDDPICC) without standing up a heavy BI or custom workflow project.

While Fathom is most widely used by sales and client-facing teams, it's also utilized across industries, company sizes, and departments to capture information from meetings and act on it faster.

What's unique about Fathom?

Proprietary Technology
Unlike generic meeting tools, Fathom is powered by its own proprietary transcription technology built in-house, ensuring accuracy, security, and performance.

More Than Note-Taking
The platform turns calls into structured, framework-aligned outputs—summaries, action items, and fields that map to CRMs or coaching workflows

Built-In Templates & Coaching Tools
The template library (including customizable summaries) helps reinforce methodologies and best practices rather than just storing transcripts.

Reliable Enablement
The combination of consistency, speed, and depth – it's less about "having notes" and more about having analysis managers can rely on for deal reviews and enablement.

How is Fathom leveraging AI?

Fathom's AI captures calls with high accuracy across speakers, accents, languages, and contexts. It applies customizable templates (SPICED, MEDDPICC, BANT, Sandler, etc.) to surface insights, action items, objections, and coaching opportunities in real time and write back to your CRM. Reps and managers can use AI Search and Ask Fathom to quickly retrieve answers and patterns across calls. By turning calls into actionable intelligence, teams find what they need, follow up faster, coach to skill gaps, and maintain consistency across deals.

What's great about Fathom?

Accurate, structured capture. High-fidelity recording/transcription with customizable SPICED summaries and AI Scorecards; outputs are consistent and editable for methodology enforcement.

Search and review speed. Ask Fathom finds objections/pricing/risk across calls in seconds and links straight to the exact call moment; the Deal View feature makes pipeline reviews faster.

CRM-ready intelligence. Auto-writes structured fields (pain, timing, roles) to Salesforce/HubSpot; case study shows 20 to 30 minutes saved per deal update and near-perfect month-end forecasts.

Independent validation. Another third-party comparison of 22 AI notetakers (each capturing the same sales call) ranked Fathom "Best Overall" for out-of-the-box sales notes: structured, skimmable, clear next steps.

Public API (newly launched). Opens custom workflows/integrations on top of recordings, summaries, and entities

What's not as great?

No native phone-call capture. Strong on video meetings; traditional telephone isn't supported currently.

Agentic breadth narrower than orchestration-first peers. Excellent at capture, analysis, and scorecards; fewer turnkey, cross-object automations until deeper writebacks mature (multi-deal writeback is on the roadmap)

What's missing? (gaps we'd watch)

Bulk updates across deals. After a single call, you can't yet update multiple open opportunities at the same account in one shot (e.g., apply the same next step, risks, or decision criteria everywhere). This keeps some manual cleanup in Ops/rep workflows.

Richer "do stuff for me" automations. Fathom excels at capturing and structuring calls, but out-of-the-box, it's lighter on multi-step, cross-object actions (e.g., update opps → create tasks → notify CSM/SE → file a ticket) compared to orchestration-first tools

What's on the roadmap?

Account-wide Ask Fathom. Ask Fathom lets your entire team instantly query and summarize insights from every customer conversation – so you can turn your collective call history into searchable, actionable intelligence.

Bot-less and in-person meeting support. A botless option and in-person meeting support will enable effortless note capture and insights across any meeting format – without relying on a meeting bot.

Ecosystem/automation lift via API. With the public API available now, expect more custom workflows, use cases, and partner integrations to show up. This typically enables more powerful automations over time.

Our quick take

Fathom converts conversations into SPICED (or other methodology)- aligned, CRM-ready details with standout accuracy and fast retrieval—validated by a third-party test. Think "capture, structure, and coach with confidence," less "full cross-system orchestration" until multi-deal and telephony expand.

Fathom is an AI notetaker and meeting partner that automatically captures insights from meetings, connects with your internal tools, and scales with your team. It handles details with fast, accurate, structured AI meeting summaries and integrations so teams can focus on conversations and move work forward more efficiently.
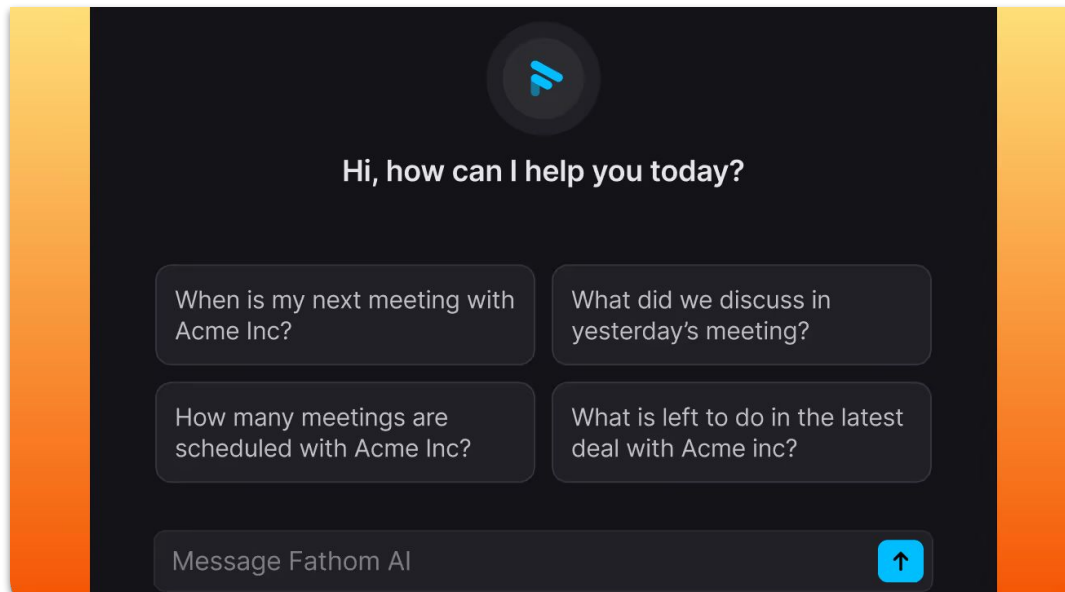
Deal View

Deal View and **customized call summaries** *(including the SPICED template) give you a clear view of who's who, what matters, and where things stand – so you always have the full picture.*

Automatic CRM Updates

*Fathom **automatically updates your CRM** with critical details from your deal summaries – from pain points and timelines to key decision makers.*

Ask Fathom

Ask Fathom what was said about budget or objections and get the answer instantly. Then have it draft a context-rich follow-up email you can send right away.

AI Scorecards
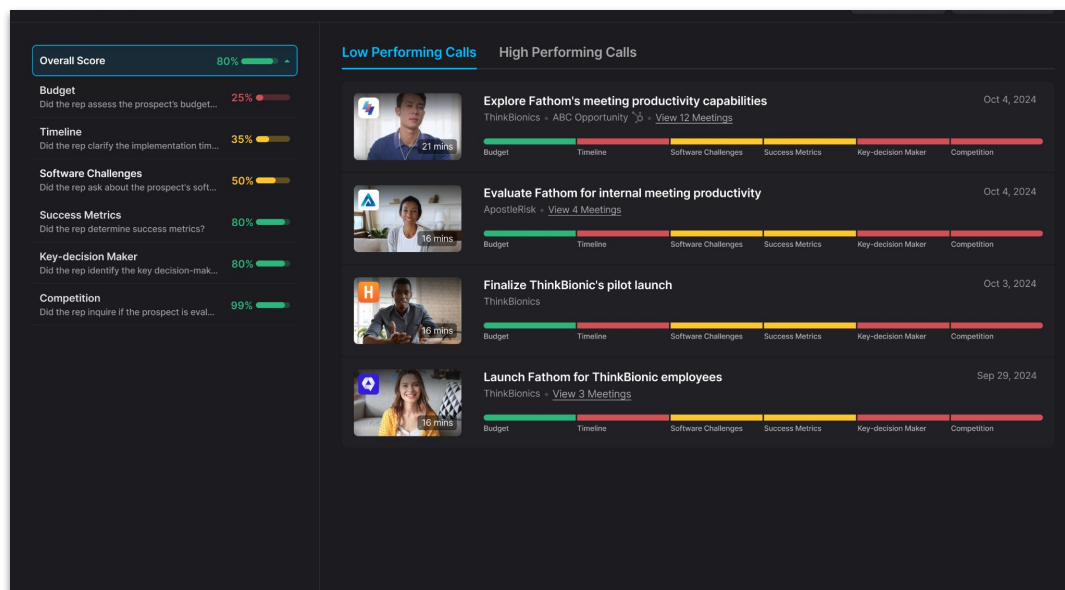
Fathom AI listens to your team's calls and generates *AI Scorecards*, grading against your chosen sales methodology, like SPICED, Sandler, MEDDPIC, BANT, or another custom rubric – so your team can improve with every conversation.

From Blindspots to Forecasting Confidence

SITUATION

James is the Revenue Operations Manager at Netgain Solutions, a B2B software company that helps accounting, healthcare, and legal firms automate and optimize their financial close processes. They used HubSpot as their CRM and Sales Hub to manage sales activities. But as the company scaled, their need for visibility and efficiency across the sales process became more urgent.

PAIN

James and his team had barely any insight into where calls were in the sales journey. There was no central place to find that information easily, forcing everyone from CROs to directors to constantly ask the sales team for updates on things like deal status.

Each request took reps about 20 minutes to answer, and for someone not directly involved in the deal, like James, it took closer to 30 minutes. At peak times, he'd field as many as 15 requests a day — that's nearly 7.5 hours spent just chasing down details, time that could've gone toward revenue-generating work. "I was getting tired of being asked silly questions," he said.

IMPACT

James led the charge to integrate an AI-powered app for call transcription and analysis that worked with HubSpot. The result was transformational. Fathom now auto-generates call summaries and makes accurate deal data instantly accessible. With Fathom data mapped onto deals, Sales Hub's reporting is visible across Netgain, saving the sales team those 20–30 minutes per deal update. Anyone at the company can easily self-serve the data they need.

James also created custom call summaries with "readiness-to-close" and "likelihood to buy" scores, which give him near-perfect accuracy in forecasts. He now feels confident knowing whether a rep is likely to close a deal within the month.

The tool has become a coaching powerhouse—reps get automated feedback, and they can analyze how their performance compares to peers. "It's enabled reps to self-drive their own coaching," James said.

Today, Fathom is indispensable at Netgain. When asked if the team still needed the tool, over 50 people responded instantly: "Yes, we absolutely need it."

*"What's at risk if we don't use Fathom? All my time, for one… It's a non-negotiable for our sales folks. And not just our sales folks: Our implementation, product and marketing teams use it too. It's a baseline for everybody here." **– James Jinkson**, RevOps Manager, Netgain Solutions*

QUANTIFIABLE IMPACT

7.5
Hours saved per day during peak times

20-30
Minutes saved per deal status update

How the Platform Supports the WbD OS

Conversation intelligence with built-in methodology enforcement

01

Fathom built native support for the SPICED methodology into their platform, allowing teams to automatically capture and organize the five key elements – Situation, Pain, Impact, Critical Event, and Decision – from every conversation and mapping them to CRM fields for inspection and action. But Fathom also takes a methodology-agnostic approach, supporting other proven frameworks like MEDDPICC, BANT, and Sandler, so teams can preserve their designed customer journey while giving leaders objective evidence of methodology adherence—core to WbD's sales as a science approach.

S P I CE D

02

For managers, Fathom makes 1:1s and pipeline reviews more data-driven and objective. They can quickly navigate to deals, filter by rep or deal stage, and get a complete view of all activity. SPICED summaries are linked directly to conversation moments, allowing managers to hear exactly what customers said. AI search lets them ask specific questions like "Did we offer any discounts to this prospect?" and find the right snippets across touchpoints—speeding up deal inspection and enabling targeted, behavior-level coaching. This operationalizes WbD's principle of measuring leading indicators (conversation quality, qualification rigor) to improve lagging indicators (conversion, forecast).

03

The platform addresses a common challenge: consistency – in qualification, discovery, and messaging. By parsing calls into structured data points and grading against your rubric with AI Scorecards, managers can spot coaching opportunities, track progression, and quantify adherence to process. Insights sync to Salesforce/HubSpot to reduce manual entry and improve forecast accuracy.

04

Fathom's intelligence extends beyond sales to support other GTM functions. Marketing can easily learn about customer pains and desired impacts directly from prospect conversations, gaining messaging insights that would traditionally require separate research. Product can identify feature requests, integration needs, and blockers mentioned, creating a direct feedback loop between customers and product development. And CS gains valuable, accurate handoff notes.

How Fathom enables what Winning by Design recommends :

Consistent qualification & discovery
Structured call analysis breaks conversations into SPICED components to inspect rep performance

Manager coaching
AI scores SPICED and identifies gaps in calls for efficient, comprehensive pipeline reviews, coaching insights, and targeted skill development

Data hygiene & deal tracking
Fathom pushes structured data to Salesforce or HubSpot with customizable field mapping

The WbD Verdict — Fathom

Quick take: Fathom is an AI notetaker and meeting partner that consistently turns calls into SPICED-aligned, CRM-ready insights with standout transcription fidelity. It shines on accuracy, customizable summaries/scorecards, and Ask Fathom search—giving managers and reps fast, reliable call details without process overhead.

Best for: *Teams that want trustworthy conversation intelligence and methodology rigor without babysitting the AI.*

Overall rating: ★★★★☆ 8.8/10

Why this score: Market-leading capture quality and methodology fit; strong CRM updates, AI search, and scorecards. Points off for no phone capture; multi-deal write listed as roadmap.

PROS

- **Accuracy + speed:** Proprietary transcription; multi-speaker/ language handling; instant, structured summaries.
- **Methodology-native:** SPICED and other templates, AI Scorecards, and coaching views tied to real call moments.
- **CRM automation:** Pushes structured fields (pain, timing, roles, etc.) to Salesforce/HubSpot.
- **AI search & follow-ups:** "Ask Fathom" retrieves moments and drafts context-rich email follow-ups.
- **Public API now available:** API keys, OAuth apps, webhooks
- **Proof points:** 95% of users say it keeps them present; 6+ hours/week saved; 3× faster from insight to next steps; case study shows 20–30 minutes saved per deal update and forecast accuracy gains.

CONS

- **No phone call capture:** Doesn't record/transcribe traditional phone calls (desk/mobile/PSTN)—so voice-only calls won't auto-ingest.
- **Multi-deal writeback is not generally available:** Updating multiple open deals at the same account from one call is still on the roadmap.
- **No voice agents:** Supports text/chat but not voice-based agents, which narrows real-time, voice-interactive use cases

WHO IT'S FOR

- **GTM teams** prioritizing accurate capture, methodology adherence, and low-touch coaching with clean CRM sync.
- **Managers** who want deal intelligence across the cycle plus fast retrieval of pricing, objections, and decision signals.

WHO IT'S NOT FOR

- **Teams seeking full GTM orchestration/agents** across systems (e.g., multi-deal writebacks, broad API-driven automations) right now.
- Organizations requiring **native phone capture.**

CORE FEATURES WE VERIFIED

Deal View with SPICED-aligned summaries; **Automatic CRM updates**; **Ask Fathom**; **AI Scorecards**; **Methodology-agnostic support** (SPICED, MEDDPICC, etc.) **Manager workflows** for pipeline reviews, searchable moments, and cross-team insight sharing.

PRICING SNAPSHOT

- **Free** plan for individuals available
- **Team** plans start at **$14/user per month**
- **Business** plans with advanced features like CRM sync start at **$20/month per user**
- **Learn more at fathom.ai/pricing**

HOW IT COMPARES (HIGH-LEVEL)

- **Fathom vs. Momentum/Sybill:** Fathom leads on capture fidelity + methodology scoring; orchestration-first peers lead on system-of-action/ agents and deeper cross-object writebacks.
- **Fathom vs. Salesroom/Demodesk:** Fathom = platform-agnostic meeting bot with high accuracy; Salesroom/Demodesk add native meeting environments and live guidance.

HOW WE SCORED:

Category	Weight	Score
Data capture quality & integrity	30%	9.5
Methodology alignment & coaching	20%	9.0
Agentic workflows & automation	20%	7.9
AI guidance (search, assist)	15%	8.7
Ecosystem/integrations	10%	8.8
Governance & reporting	5%	8.6
Overall		**8.8/10**

Scope and date: Assessment as of May 2025 using vendor demos, documents, and interviews. Re-validate for your stack and motion.

To learn more about **FATHOM**

Visit fathom.ai/partner/spiced

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