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ACTIVITY CAPTURE

Meeting Intelligence

Capture CRM-Ready Context With Privacy and Control

Riva Meeting Intelligence helps regulated teams turn client conversations into structured, trusted intelligence without changing how teams work. Using approved Teams and Zoom recordings and transcripts after meetings, Riva helps teams identify decisions, commitments, risks, and next steps in standardized formats that support better follow ups, continuity, auditability, and CRM hygiene at scale. Teams can also connect meeting intelligence to CRM records and activity data, making relationship context easier to review, share, and apply across the client lifecycle.

Turn Conversations Into Clearer Follow Ups, Planning, and Action

Riva Meeting Intelligence helps regulated teams capture, structure, and act on meeting context with consistency and control. Using approved Teams or Zoom recordings and transcripts, it turns client conversations into CRM-ready summaries, next steps, and relationship context.

Adopt AI With Enterprise Governance and Control

Use AI without the risks of live meeting listening tools. Riva analyzes approved post-meeting transcripts, allowing organizations to apply privacy and security controls, such as sensitive data redaction, before AI accesses the content. This helps support adoption, trust, governance, and compliance while preserving control over transparency and consent.

Transform Transcripts Into Impactful Actions

Convert approved meeting transcripts into structured summaries, standardized notes, tasks, and follow ups that adhere to best practices. Teams can edit generated summaries, decisions, and next steps before saving them, helping them review less, act faster, and keep important meeting outcomes from getting lost.

Complete the Client Relationship Picture

Meetings capture decisions, risks, commitments, and context that CRM activity alone may miss. Riva connects meeting intelligence to Salesforce records and activity data, helping teams improve account visibility and relationship continuity.

Reduce Manual Work Across the Meeting Lifecycle

Help advisors prepare, capture, and follow up with less administrative effort. AI-assisted prep, summaries, and recommendations give teams more time for client engagement and strategic planning.

Meeting Intelligence Supports the Client Relationship Lifecycle

THIS ALLOWS YOU TO:

Maintain Client Trust

- Capture meeting intelligence without the risk of live AI listening tools.
- Disclose use of AI with confidence supported by enterprise-level data privacy controls.
- Control who can access and share meeting outcomes with centralized permissions from your CRM.

Convert Meetings Into Value

- Turn long transcripts into structured intelligence that helps move relationships forward.
- Capture and refine decisions, commitments, risks, and next steps before saving them to your CRM.
- Focus on strategic planning rather than administrative tasks that hurt productivity.

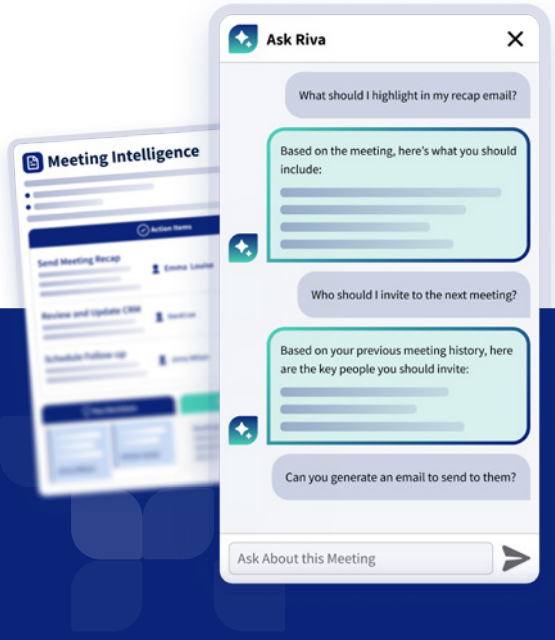
Build Better Relationships

- Connect meeting intelligence to CRM records, so relationship context is accessible across teams.
- Prepare for meetings in minutes, helping every client feel valued.
- Summarize follow-ups and decisions across client conversations, enabling consistent follow-through that creates trust.

Operate Securely in Regulated Environments

- Work with enterprise-approved meeting tools and recording policies.
- Apply privacy controls before AI analysis, including filtering, redaction, and permission-based access.
- Support existing compliance, consent, retention, and audit expectations.

> We had a lot of meetings, but outcomes weren't always clear. Meeting Intelligence helped us strengthen alignment, reduce silos, and turn conversations into clear next steps without adding extra work.
>
> **— Meeting Intelligence User**



Turn Client Meetings Into Trusted, CRM-Ready Intelligence

Experience enterprise-grade meeting intelligence built for regulated industries. Riva helps teams create structured summaries, follow ups, and CRM-connected relationship context, so client conversations lead to clearer action, stronger records, and safer AI adoption.

Book a Demo

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