

Turn your call library into an enablement engine

The exact prompt, three ways to build it, and the skills rubric — adapt it to any touchpoint your team runs.

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The Full Prompt

This is the exact prompt used in Gong's AI Builder to analyze roughly 100 EBR calls. Adapt it to your touchpoint:

"Analyze [ROLE]-led [TOUCHPOINT] calls from the past 2–3 quarters and identify patterns that indicate where [ROLE]s may need additional enablement or support. Identify recurring moments where [ROLE]s struggle, hesitate, or provide unclear responses. Highlight questions customers have difficulty getting answered. Surface recurring customer concerns. Call out where business value and ROI aren't clearly articulated. Identify gaps in executive-level storytelling. Note where product capabilities are misunderstood or inconsistently explained."

To customize:

- Replace **[ROLE]** with your team (CSM, AE, SDR, etc.)
- Replace **[TOUCHPOINT]** with the meeting type you're auditing (EBR, discovery call, pricing conversation, renewal, demo)

What makes this prompt work: It's specific. It's not "summarize these calls." It asks for patterns of struggle, questions customers couldn't get answered, and gaps in value and storytelling. The more specific your question, the more useful the output — true in any AI tool.

How to Build This

Full Stack

Conversation intelligence tool with native AI analysis (e.g. Gong) + a dedicated AI practice platform (e.g. Luster)

Best for: Teams with a CI platform that has a built-in AI query or analysis feature, plus a dedicated AI coaching platform.

What this unlocks: Speed and scale. Pattern-level signal across a full call sample in one run, and individualized coaching prescriptions per rep without manual review.

Step	Action
1	Filter your call library to a specific touchpoint and time window. Aim for 50–100 calls minimum over the last 2–3 quarters. Filter by call type/tag, or by duration and attendee title if calls aren't tagged.
2	Run the AI analysis. In Gong, go to AI Builder, create a new AI Brief, paste the customized prompt, apply your filtered call set as the data source, and run it. (Drafting your prompt in an LLM first, then refining it for the platform, is fair game.)
3	Identify the skill gaps. Read the output for patterns across 60%+ of calls. Prioritize behaviors that carry disproportionate business risk and skills that, if improved, lift the whole role. If the EBR is where every CSM skill shows up, improving EBR skills improves everything downstream.
4	Build a skills rubric. Name each gap and write a one-sentence definition of "good." This rubric is the foundation for everything downstream: training, role play, scoring, tracking.
5	Train your AI practice platform on the rubric. Build a roleplay scenario that mirrors the audited touchpoint. Set practice quotas per rep per quarter and establish individual baselines.
6	Set a baseline and track. Watch leading indicators (practice score improvement, quota completion) and lagging indicators (retention, expansion ARR, executive participation).

Mid-Range

Any call recording tool + an AI coaching layer (Chorus, Mindtickle, Allego, etc.)

Best for: Teams with a recording tool that lacks robust built-in AI analysis, paired with a coaching platform that can analyze call quality or generate feedback across reps.

The process is the same. The tools just change the speed.

Step	Action
1	Export or access calls from your recording tool. Filter to the target touchpoint — same logic as Full Stack: 50–100 calls, last 2–3 quarters.
2A	If your coaching platform can analyze across multiple calls: upload or connect the call batch and run the prompt above, adapted for your platform's query format.
2B	If your platform works call-by-call: pull transcript exports and batch them into a Claude or ChatGPT session (see the Lean approach for exactly how).
3	Name the skill gaps, write the rubric, and build from it — using your coaching platform's roleplay or simulation features trained on the rubric.

Lean

Transcripts + Claude (or any LLM) — zero budget required

Best for: Teams with limited tooling. Google Meet transcripts, Zoom auto-transcripts, Gong exports — anything that gets you text. This is how the Boomi team started before getting AI Builder access.

Step	Action
1	Pull transcripts from your meeting platform. Aim for 20–50 calls minimum. Focus on one touchpoint — don't mix discovery calls and renewals in the same pass.
2A	Paste in batches: copy 5–10 transcripts at a time into a Claude or ChatGPT conversation. Add a header before each ("CALL 1:", "CALL 2:") so the model can distinguish them.
2B	Or compile into a document: combine transcripts into a single Google Doc or text file and upload it. Use complete transcripts, not call summaries.
3	Run the customized pattern-analysis prompt below.
4	Take the output and name specific, coachable skill gaps. Write a definition of "good" for each. Ask the LLM to help: "Based on the output you just generated, help me identify specific, coachable skill gaps I can build an enablement program around."
5	Build enablement from the rubric: a workshop built from the surfaced patterns, peer call review using the rubric as a scoring guide, a library of high-scoring examples, or self-scored practice.
6	Track manager call-review scores against the rubric (2–3 calls per rep per quarter), self-assessment scores, and lagging indicators like retention and expansion.

The Lean analysis prompt:

"I'm going to share [X] call transcripts from [ROLE]-led [TOUCHPOINT] conversations. After reviewing all of them, identify patterns — not feedback on individual calls, but themes that show up across the full set. Specifically: (1) Where are [ROLE]s consistently struggling, hesitating, or giving unclear responses? (2) What questions are customers asking that aren't getting answered well? (3) Where are there gaps in business value and ROI articulation? (4) Where is executive-level storytelling weak or missing? (5) What recurring customer concerns surface that [ROLE]s aren't handling confidently? Give me pattern-level findings — specific coachable behaviors — not a summary of individual calls."

The Skills Rubric

From the Boomi EBR audit — as a reference / starting point

These are the 7 coachable skill gaps that surfaced from analysis of ~100 CSM-led EBRs. Use this as a template to build your own rubric for your touchpoint.

#	Skill	Definition of "Good"
1	Proactive Value Articulation	States value before being asked; doesn't wait for the customer to probe.
2	Executive-Level Storytelling	Frames outcomes in language that resonates at the C-suite, not the admin layer.

3	Data Presentation Confidence	Owens the numbers in the room; doesn't read slides, drives the narrative.
4	Product & Technical Fluency	Explains product capabilities and limitations clearly; doesn't misrepresent or dodge.
5	Objection Handling	Addresses pushback in the moment; doesn't escalate or defer unnecessarily.
6	Roadmap & Expectation Management	Handles feature requests and timeline questions confidently and strategically.
7	Cross-Functional Coordination	Clear on escalation paths and support handoffs; doesn't leave the customer uncertain about next steps.

How to Apply This by Role

The Conversation Audit works for any touchpoint your team runs repeatedly. Rule of thumb: if a meeting type happens more than 10 times a month and there's some shared definition of "good," it can be audited.

Role	Touchpoint to Audit	What You're Likely to Find
CSM / AM	Executive Business Reviews / QBRs	Value articulation gaps, reactive vs. proactive posture, data presentation confidence
AE	Discovery calls	Qualification rigor, problem diagnosis depth, next-step urgency
AE	Pricing / proposal conversations	Objection handling, commercial confidence, multi-threading
SDR	Cold outreach / first meetings	Relevance of opening, curiosity-to-pitch ratio, handling early objections
CSM / AM	Renewal conversations	Early risk signals, proactive expansion conversations, executive access
SE / Solutions	Demo calls	Discovery before demo, handling technical objections, business value framing

The Conversation Audit — a ReflectPath resource by Fiona Simpson. Closing the gap between boardroom strategy and field execution.

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