Ergo

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CASE STUDY

Retell AI was leaking millions. Ergo stopped it.

Spread across spreadsheets, Slack and WhatsApp, Retell could only track about 60 deals at once.

VOICE AI · $60M REVENUE AS OF MAY 2026 · ~200 INBOUND LEADS / WEEK

~6×

opportunities tracked: ~60 → 300–400

~3×

pipeline visibility: ~$2M → $6–7M

~90%

less rep admin per week



Retell AI × Ergo — video case study youtube.com/watch?v=IsQf8YkjoRU

> “Ergo is the answer to a prayer: how not to get buried under bloated, legacy CRMs. I can’t imagine going back. In two words, dangerously efficient.”
>
> **Vidhan** — VP of Revenue, Retell AI

A lean team, a growth curve that would not wait

Retell AI builds voice agents that replace “dial 1 for this department, 2 for that” with human-level conversation. The company has scaled to $60M in revenue as of May 2026, one of the fastest growth curves in voice AI. Its lean sales team fields around 200 inbound leads a week across enterprise and SMB, plus a network of embedded partners.

Before Ergo, they ran on spreadsheets, Slack, WhatsApp, Fathom, and a lightly used HubSpot, and could only track about 60 deals at once.

To build a sales-led motion on top of its product-led growth, Retell needed three things:

- One centralized ledger the whole team works off, not deals scattered across spreadsheets, Slack, and WhatsApp.
- Pipeline tracked at scale, including the mid- and low-tier deals that kept slipping.
- Automation that protects speed-to-revenue, so a lean team can act before the iron goes cold.

> “Ergo is the best thing we’ve put in our revenue stack. We were leaking millions in revenue, and Ergo recovered it.”
>
> **Vidhan** — VP of Revenue, Retell AI

The challenge

A lean team couldn’t keep pace with ~200 inbound a week.

Updates were manual and static, spread across spreadsheets, Slack, and WhatsApp. In voice AI, that drift is fatal: it is all speed to lead and speed to revenue. The moment admin slows you down, you have lost the customer.

The pipeline hit a ceiling at ~60 deals, and the mid-market quietly leaked.

The biggest deals got all the attention; mid- and low-tier opportunities drifted. Around 25–30% of pipeline was stalling and roughly 10–15% of smaller deals fell through the cracks, turning six-month cycles into nine-month ones.

When deals went wrong, the knowledge wasn’t there.

There was no fast post-mortem, so the same mistakes repeated. And sales-to-engineering handoffs lived in people’s heads as tribal knowledge, hard to repeat as the team scaled.

The first “aha”

For Vidhan, it clicked on the deals that didn’t go right. Minutes after the meeting, Ergo delivered a systematic breakdown of exactly where the deal fell apart.

For Grant, it was scale. The team went from around 60 trackable deals to 300–400 across every team and embedded partner, and migrated the entire org onto Ergo within 24 hours.

> “It’s easy when deals go right. What matters is when they go wrong. Minutes after a call, Ergo shows exactly where the deal slipped, so we close the gap and loop in the right people fast.”
>
> **Vidhan** — VP of Revenue, Retell AI

Results and ROI

METRIC	BEFORE	AFTER (ERGO)
Revenue leaking from stalled deals	Low 7-figures	Recovered
Opportunities tracked	~60 ceiling	300–400 · ~6×
Pipeline tracked	~$2M	$6–7M · ~3×
Rep admin / week	8–15 hrs	~1–1.5 hrs · ~90% less
Follow-up after a call	4–5 days	<2 min draft · 70% sent
Forecasting accuracy	Baseline	+20–30%
Pilot-to-close success	~93%	Nearly 100%
New AE and SDR ramp	Baseline	~30% faster

What Ergo does for Retell AI

Ergo sits as one layer over HubSpot, turns raw conversations into structured, usable data, and acts on it — from first contact to close to expansion.

Opportunity scoring and auto-qualification

Scores every lead so the lean team focuses on real deals and routes the rest to partners and resellers. Hyper-qualification built into every opportunity.

Autonomous CRM and AI follow-ups

Auto-fills HubSpot from calls and emails, and drafts the follow-up into the rep's inbox within about two minutes. Around 70% get sent.

Systematic deal post-mortems

Minutes after a meeting, breaks down what happened and where the deal fell apart, won or lost, and flags who needs to act.

Leadership reporting and strategy

Closed-lost reasons, competitor intel, and feature requests roll up — and surfaced the insight that pivoted Retell from 12-month deals to a land-and-expand motion.

> "Before Ergo, we were leaking at least low seven figures, and that's just the initial land. With expansion on top, it multiplies. For a company our size, that's monumental. Ergo closed that gap."
>
> **Vidhan** — VP of Revenue, Retell AI

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Ergo

Give your sales team their Sundays back.

Ergo is the unified context layer for revenue teams. Every go-to-market conversation an organization has — calls, meetings, email, Slack, cold calls, and the CRM itself — in one place where it can be analyzed at scale and acted on at scale.

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