

Why Document Crunch Chose Bagel Over Building It In-House, and Scaled Its Discovery Process into One Engine Wired to Claude

RESULTS AT A GLANCE



Roadmap re-prioritized around features customers were asking for



Every roadmap priority backed by customer count, prospect demand, and ARR



Bagel evidence served to Claude through the MCP for team-wide analysis

01 The Challenge: A Strong Process, Running on Individual Judgment

Document Crunch reviews construction contracts and project documents with AI, catching conflicts before they turn into disputes. The company runs eight-week sprints, and the product team spends the opening weeks of every cycle deciding what ships next. Marcus Erickson, Senior Product Manager, focuses on turning customer signal into that decision-making, a mandate that started when Chris Bruner, who leads the product team, challenged him to find a way to get signal out of all of Document Crunch's customer communications.

The team already had good habits: discovery calls with customers, a Slack channel where CS could route requests straight to product, and Momentum recording every conversation, so nothing depended on one person's memory of a call. Because the team is AI-forward, every PM was already using Claude or ChatGPT to look for patterns in that material, each running their own prompts.

Five PMs running five sets of prompts meant five slightly different reads of the same evidence, and no single, consistent record of what customers were actually asking for across every channel at once.



Everyone is trying their own prompts, which would mean if you are a PM and I'm a PM, we're getting different results because we're using different prompts. And we might even do a different prompt next week when I run it again.

Marcus Erickson · Senior Product Manager, Document Crunch



THE GOAL One Engine, the Same Way, Every Time

Marcus wanted one source that processed every signal the same way, no matter which PM was running the analysis that week. Three requirements shaped the search:

1

Integrate across every stream where signal already lived: Slack, Momentum call recordings, and Salesforce

2

Seed the engine with the roadmap ideas the team already had, and let it both validate those ideas against real demand and surface what was missing

3

Attach business value to every signal, so priority conversations could start from ARR exposure alongside the qualitative case

02

Why Bagel, Over Building It or Running Claude Alone

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I looked at about 10 or 15 different products and I really thought that Bagel had the best ability to integrate across a whole bunch of different streams like Slack, Momentum, Salesforce, bring all that together.

Marcus Erickson · Senior Product Manager, Document Crunch

Marcus evaluated 10 to 15 products before choosing Bagel, already using Claude heavily himself.

Beyond integration, Marcus points to Bagel's ability to start from the roadmap the team already had, rather than just handing back whatever themes an AI happened to find on its own: Bagel could both suggest new ideas and verify whether customers were actually asking for the ones already planned, something he says most other tools couldn't do.

Document Crunch is a company full of AI-forward engineers, so the build-vs-buy question comes up often. Marcus's answer stays consistent: Bagel runs one engine that processes data the same way every time, with real work behind the ordering of ideas and every source already connected, which lets the team spend its energy on its own product instead of building something else.

03

How Document Crunch Uses Bagel AI



Count Every Mention as a Vote

Bagel ingests every recorded call, Slack thread, and CRM note, and counts each customer mention as a vote automatically, without the customer logging in or clicking anything.

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Older tools waited for people to upvote and downvote. And upvoting takes an act: I have to have the energy to actually log into something and then find that and then upvote it. So the cool thing to me about Bagel is you and I can just be talking about what I'd really love to see in Bagel, and Bagel will pick that up and automatically count that as a vote.

Marcus Erickson · Document Crunch



Seed the Engine with the Existing Roadmap

Bagel starts from the ideas the team already has, then works in both directions: surfacing new opportunities and verifying whether customers are asking for the ones already planned.



Tie Every Signal to Revenue

The Salesforce integration attaches deal value to every request. Marcus points to a simple gut check: if \$6 million of the company's \$10 million in revenue is tied to customers asking for one feature, that starts giving you an idea on its own.



Broadcast the Signals Weekly

Every week, an automated workflow pulls the team's saved Bagel views and posts the ranked signals to Slack, where sales and CS see what's moving and respond with what they're hearing in the field. Marcus compares it to a Billboard Top 40 countdown: which ideas moved up this week, which moved down, so everyone can see which signals are gaining strength.

04

The Bagel MCP: The Engine Inside Claude

Marcus writes his own Claude skills and works in Claude Cowork every day. The Bagel MCP put Bagel's decision engine directly inside that environment, and that is where the workflow runs now.



bagel THE DECISION LAYER

Bagel processes the full volume of calls, tickets, and notes, builds the semantic relationships and the mapping of ideas, and holds the evidence behind each one.

MCP

CLAUDE - THE BUILDING TOOL

Claude builds on top of Bagel's evidence: the generic questions, the analysis across 500 customers at once, and the planning that turns decisions into what ships next.

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Claude itself would not do well at all of those calls, all those transcripts. It can't handle all of that. Bagel is doing a wonderful job of providing all that semantic relationships and building the mapping of those ideas, so that I can ask more generic questions. You ask Claude something like that, and even though it's AI, it almost has to be very specific about certain wordings. But Bagel's got a really powerful engine, and the MCP server is letting me pull that in and use it exactly what you're supposed to do with an MCP server.

Marcus Erickson · Senior Product Manager, Document Crunch

Marcus uses the pairing to compare evidence across the customer lifecycle: pulling Bagel signal from before a customer bought, during onboarding, and after, alongside product usage data, and asking Claude to work across all of it at once.

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I've pulled data from things like Bagel to show, using time frames: these are comments that came in before they bought, these are comments that came during that couple month onboarding, here's comments that came in afterwards. So I can look at both the usage data and some of the evidence in Bagel based on those time periods per customer. And that's where something like Claude really rocks, because I can say go look at our 500 customers and group all that data by all those periods for each customer, and I don't have to write the code.

Marcus Erickson · Senior Product Manager, Document Crunch

05

The Result: A Roadmap Backed by Evidence

Customers kept mentioning one request across calls: the ability to write their own prompts to review contracts. Bagel counted it.

70%

of customers and prospects had asked for the ability to write their own review prompts.

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That was never on our road map, people talked about it, but really let us see this has been asked for by 70% of our customers and our prospects. So it let us drive and change our road map to make sure we fit that in earlier. And that's exactly what I want a tool like Bagel to do.

Marcus Erickson · Senior Product Manager, Document Crunch

Roadmap meetings run on Bagel now. When the PM team presents its top features to sales and CS, every slide pulls from Bagel: how many customers asked, how many prospects, how often it comes up, and the revenue tied to it. Marcus adds real customer quotes to those same slides, since seeing an actual customer's words lands differently with sales and CS than a chart alone, otherwise a request can look like the product team's pet feature.

State of Play: Then and Now

BEFORE BAGEL AI	WITH BAGEL AI
Each PM running their own prompts to analyze customer signal	One consistent engine analyzing every signal the same way for the whole team
Customer votes captured when someone chose to log into a voting tool	Every mention across every call counted as a vote automatically
Priority decisions weighed through team debate and each PM's read of the data	The same debate, now backed by customer count, prospect demand, and ARR
A frequently-mentioned request circulating without a clear read on its size	Demand for that request quantified at 70%, and prioritized accordingly
Claude analyzing whatever a PM fed it by hand	Claude analyzing Bagel's consolidated, evidence-backed themes through the MCP
Ranked signals shared with sales and CS through a manual weekly write-up	Ranked signals broadcast to Slack automatically, every week

What's Next

With the MCP workflow running, Marcus is extending it. Next is release feedback review through Claude with date filters shaped alongside Bagel's team, so the team can ask what customers said about a feature in the weeks right after it shipped. Bagel keeps holding the connected, evidence-backed signal, and Claude keeps doing more of the thinking on top of it.

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Humans have recency bias. Whatever call they got off yesterday is what they remember. Bagel's better at saying, show me the patterns over the last six months.

Marcus Erickson · Document Crunch

“Document Crunch's product team runs on a strong process. Bagel gives it one consistent record everyone can build on, then hands it straight to Claude through the MCP. That's a connected decision loop, running end to end.”

Corinne Golan · Head of Customer Success, Bagel AI



ABOUT DOCUMENT CRUNCH

Document Crunch, a Trimble company, is an AI-powered contract and project intelligence platform for the construction industry. The platform reviews contracts and project documents, surfaces risks and conflicts across them, and helps teams resolve issues before they become disputes, in pursuit of a zero-dispute construction industry.

bagel

ABOUT BAGEL AI

Bagel AI is your Product Decision Partner: the autonomous decision layer for AI-native product and engineering teams. Bagel turns scattered customer signal from tools like Gong, Salesforce, Zendesk, Slack, and Jira into scoped, evidence-backed product decisions, quantifies their business impact, and serves them to your team and every AI tool that speaks MCP.



See the decision layer that powers this workflow

Turn scattered customer signal into scoped, evidence-backed decisions.

[Platform overview →](#)
[bagel.ai](#)
