Every deal, from first call to paid invoice, in one CRM your team will use

A CRM with a built-in AI assistant, for sales teams of three to 25 people

Software buyers expect more, and setup is where it goes wrong

50%

of software buyers name AI as the top outside factor shaping their business goals

66%

report unexpected disruption, regret or both after a software purchase

89%

of those with regret first hit a problem during implementation

Source: Capterra 2026 Software Buying Trends Report, 3,385 software decision-makers across 11 countries.

Deals slip away in the gaps between tools

1

Pipeline in spreadsheets

Forecasts become a guess, and the founder has to ask for a spreadsheet to see the pipeline.

2

Invoices in another tool

Customer details get re-keyed between sales and billing, and errors reach the customer.

3

Follow-ups left to memory

A reminder sits in a file nobody opens that week, and the deal goes quiet.

Question for your team

Roughly how many deals a quarter end with a missed follow-up?

One record from first call to paid invoice

Today

- Contacts in a spreadsheet, deals in another
- Invoices created by hand in a separate tool
- Follow-ups tracked in someone's memory
- Forecast assembled once a month

With the product

- One customer record shared by sales and billing
- Invoices raised from the won deal
- Calls logged and follow-ups drafted by the assistant
- A live pipeline the founder can open any day

Up and running in three steps

1

Import your contacts

Contacts and deals come in from a spreadsheet in an afternoon.

2

Connect your email

The assistant starts logging calls and drafting follow-ups.

3

Invite your team

Reps work from one pipeline, and billing works from the same record.

Deal to invoice in one place

What changes for you

No re-keying between sales and billing

How it works

CRM and invoicing share one customer record

Proof

Setup time from trial accounts, to be measured

Pillar 1 of 3

An assistant that handles the admin

What changes for you

Reps spend more time selling

How it works

The AI logs calls and drafts follow-ups

Proof

Hours saved per rep, from beta users

Pillar 2 of 3

A price that holds as you grow

What changes for you

No surprises at renewal

How it works

One flat per-seat price on every paid plan

Proof

Published pricing page

Pillar 3 of 3

Customer proof

Result

The headline outcome, with a number

Customer

Company, size, industry and team

Challenge

What wasn't working, in their words

Results

Measured outcomes with timeframes

A beta customer story goes here once results are confirmed.

One flat price per seat on every paid plan

[$ per seat, per month]

Invoicing, help desk and the AI assistant included

Set the price from the price test in Module 1 before this slide goes to buyers.

- No jump in price as you add seats or reporting
- A 14-day trial with your own pipeline
- Guided import of your contacts and deals

Start a 14-day trial with your own pipeline



Day 1

Import contacts and deals with our team

Day 7

Review adoption with your Head of Sales

Day 14

Decide, with pricing agreed in writing

Book the trial kickoff for [date].