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CRMOS

Autonomy That Scales Loyalty

One Platform. Every Interaction. Infinite Insight

Use of Funds:

Transform customer platforms from cost-centers
into measurable growth engines.

Unify every customer signal into a single intelligent engine, turning data into decisions, and actions into outcomes.



Most CRM system are digital filing cabinets, they store interactions but don't drive them. CRMOS changes that. An AI-native Customer Operating System that unifies sales, marketing, services, and operations into one autonomous platform. It predicts churn, personalizes journeys, automates complex workflows, and enforces compliance by design all while measuring its own business impact. We're not evolving CRM. We're replacing it.

- Awase Khirni Syed

Core Role

Frontline seller engaging prospects directly through face-to-face meetings, product demonstrations, and strategic negotiations to close deals and drive revenue growth.

Primary Goals

Close deals efficiently, maintain strong customer relationships, consistently meet or exceed individual quotas, and maximize territory revenue potential.

Daily Challenges

Time wasted on manual data entry, lack of real-time intelligence during critical calls, difficulty accessing updated pricing or contract terms, and missed follow-up opportunities.

System Access & Permissions

| | |
|--|---|
| Full Access | Restricted Access |
| <ul style="list-style-type: none">Complete team pipeline visibilityEdit opportunities with audit trailAI-generated insights and recommendationsTeam-level dashboard configuration | <ul style="list-style-type: none">Compensation data (HR-controlled)Individual rep commission detailsExecutive-level financial reportingCompany-wide strategic planning |

Daily Technology Stack

| | |
|--|--|
| CRM Platform | CPQ System |
| Central hub for customer relationships, pipeline management, and deal tracking across the entire sales organization. | Configure-Price-Quote tool for accurate proposals, pricing approvals, and streamlined discount workflows. |
| ERP Integration | Analytics Dashboard |
| Enterprise Resource Planning connectivity for order processing, fulfillment tracking, and customer account status. | Real-time performance metrics, forecasting tools, and AI-powered insights for data-driven decision making. |

Real-World Use Case: Deal Risk Management

| | |
|---|--|
| 01 | 02 |
| Alert Triggered | AI Analysis |
| Sales Manager receives notification: three high-value deals stalled in negotiation phase for 14+ days. | CRMOS surfaces risk scores based on historical deal patterns, competitor activity, and buyer engagement signals. |
| 03 | 04 |
| Action Recommendations | Forecast Adjustment |
| System suggests next-best actions: strategic discount via CPQ, executive sponsor engagement, or contract term adjustment. | Automated forecast recalculation with probability weighting, enabling accurate pipeline reporting to leadership. |

Engagement Journey



Bottom Line: Sales Managers need intelligent automation that eliminates manual reporting, surfaces deal risks proactively, and provides actionable insights—not just more data. CRMOS transforms them from reactive firefighters into strategic revenue drivers.

Core Role

Oversees regional or product-line sales teams, driving quota attainment, ensuring forecasting accuracy, and optimizing team performance across the sales cycle.

Primary Goals

Achieve aggressive revenue targets, improve win rates, reduce sales cycle length, and maintain accurate pipeline reporting for strategic planning.

Key Pain Points

Battles inaccurate forecasts from stale data, inconsistent lead qualification, poor visibility into deal blockers, and overwhelming manual reporting overhead.

System Access & Permissions

Full Access

- View and update assigned accounts and opportunities.
- Submit quotes via (CPQ(Configure-Price-Quote)
- Log activities and customer interactions
- Limited cross-team data access without approval.

Essential Tools

- Mobile CRM application for on-the-go access
- Video conferencing platforms for virtual meetings
- CPQ for accurate pricing and proposals
- AI-powered call summarization and intelligence

Engagement Journey



AI-Powered Sales in Action

During a zoom call, CRMOS transforms the sales conversation by transcribing in real-time, detecting the prospect’s interest in customization options, and intelligently suggesting relevant product bundles that match their needs. After the call concludes, the system automatically logs detailed notes, captures action items, and schedules appropriate next steps freeing the rep to focus entirely on building relationships rather than administrative tasks

Core Responsibilities

Manages end-to-end campaign execution, lead flow optimization, and attribution modeling while ensuring seamless integration across the entire marketing technology stack.

Strategic Objectives

Maximize lead conversion rates, optimize spend allocation per channel, ensure clean lead handoff to sales teams and deliver comprehensive ROI measurement.

Critical Challenges

Battles siloed data between marketing automation and CRM, inconsistent lead scoring models, inability to track cross-channel customer journeys, and delayed feedback loops that slow optimization.

System Access & Permissions

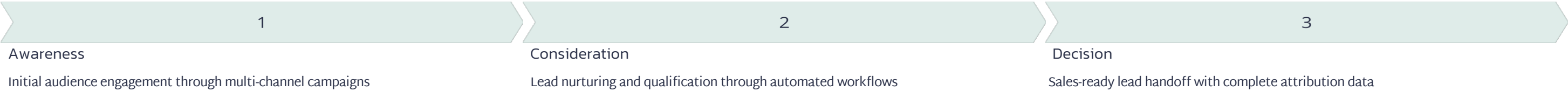
Full Access

- Campaign databases
- Lead scoring models and analytics reports
- Ability to modify workflows independently but requires approval for changes affecting live funnels.
- Historical campaign data remains protected

Essential Technology Stack

- Marketing Automation Platform (MAP)
- Customer Relationship Management (CRM)
- Google Analytics & Attribution Tools
- BI Platforms & UTM parameter builders for tracking

Engagement Journey



Real-World Impact Scenario

CRMOS identifies that webinar attendees from LinkedIn ads convert 3x higher than those from search campaigns. The platform automatically reallocates budget to high-performing channels and adjusts lead routing rules to prioritize these qualified prospects delivering measurable ROI improvements without manual intervention.

Core Responsibilities

Drives post-purchase value realization and product adoption. Acts as trusted advisor to maximize customer outcomes and reduce churn risk.

Primary Goals

Increase Net Revenue Retention (NRR), expand account usage, identify upsell opportunities, and improve customer health scores.

Critical Challenges

Reactive engagement patterns, fragmented customer behavior visibility, and late detection of dissatisfaction signals.

System Access & Permissions

Full Access

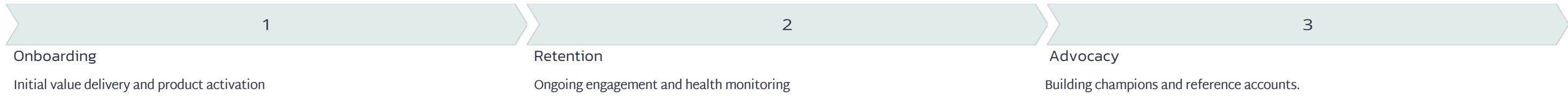
- Customer health dashboard
- Product usage logs
- Support ticket history
- Success plans
- Financial data requires authorization

Essential Technology Stack

CSMs rely on integrated platforms to monitor customer engagement and coordinate touchpoints.

- CSM for relationship management
- Customer Health Platform for risk monitoring
- Product Analytics for usage insights
- Communication tools (Email, Slack, Teams)

Engagement Journey



CRMOS in Action: Proactive Intervention

When CRMOS detects declining login frequency and low feature adoption for a key client, it automatically triggers a pre-emptive outreach workflow. The system assigns the appropriate CSM and drafts a personalized check-in email with recommended training modules transforming reactive firefighting into proactive success management.