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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.



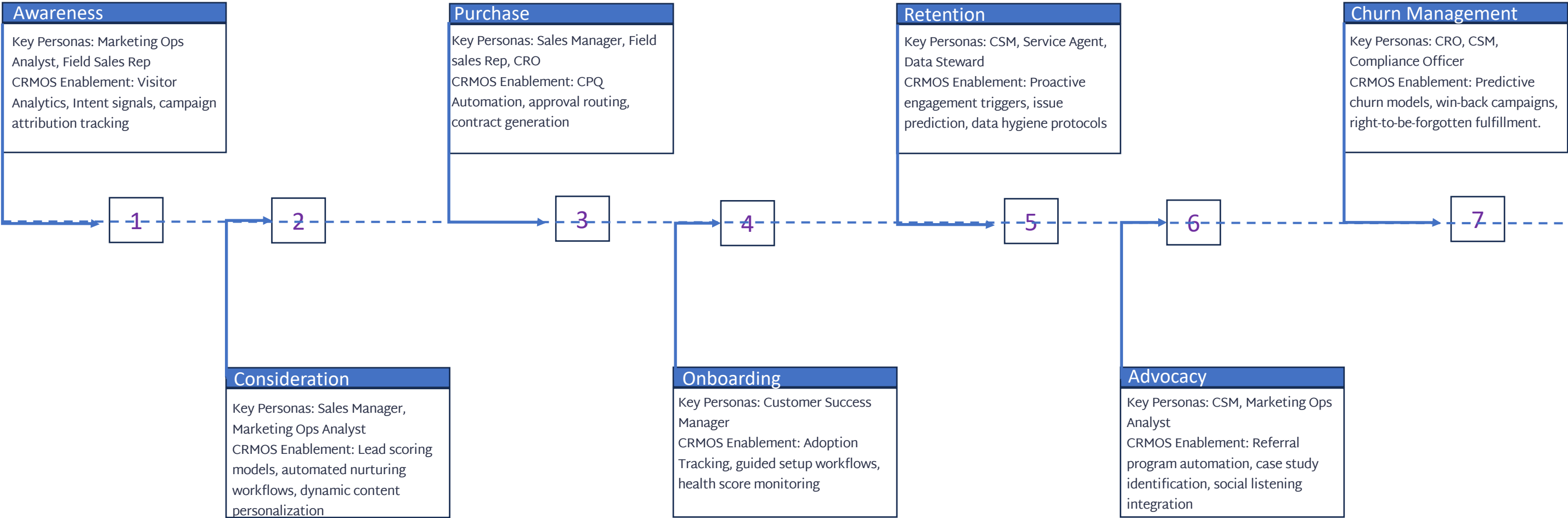
Most CRM system are digital filing cabinets, they store interactions but don't drive them. CRMOS changes that. An AI-native Customer Operating System that unifies sales, marketing, services, and operations into one autonomous platform. It predicts churn, personalizes journeys, automates complex workflows,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

- Awase Khirni Syed

Mapping User Archetypes to Customer Lifecycle Stages



CRMOS serves as a unified nervous system across the customer journey, enabling cross-functional teams to orchestrate seamless experience. Each lifecycle stage demands specialized enablement capabilities that align with the personas responsible for driving outcomes at that phase



This mapping ensures CRMOS functions as a unified nervous system rather than a siloed departmental tool, enabling synchronized orchestration across the entire customer journey with role-specific enablement at each critical touch point.

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

| | |
|--|--|
| <h3>CRM Platform</h3> <p>Central hub for customer relationships, pipeline management, and deal tracking across the entire sales organization.</p> | <h3>CPQ System</h3> <p>Configure-Price-Quote tool for accurate proposals, pricing approvals, and streamlined discount workflows.</p> |
| <h3>ERP Integration</h3> <p>Enterprise Resource Planning connectivity for order processing, fulfillment tracking, and customer account status.</p> | <h3>Analytics Dashboard</h3> <p>Real-time performance metrics, forecasting tools, and AI-powered insights for data-driven decision making.</p> |

Real-World Use Case: Deal Risk Management

| | |
|--|--|
| <div>01</div> <h3>Alert Triggered</h3> <p>Sales Manager receives notification: three high-value deals stalled in negotiation phase for 14+ days.</p> | <div>02</div> <h3>AI Analysis</h3> <p>CRMOS surfaces risk scores based on historical deal patterns, competitor activity, and buyer engagement signals.</p> |
| <div>03</div> <h3>Action Recommendations</h3> <p>System suggests next-best actions: strategic discount via CPQ, executive sponsor engagement, or contract term adjustment.</p> | <div>04</div> <h3>Forecast Adjustment</h3> <p>Automated forecast recalculation with probability weighting, enabling accurate pipeline reporting to leadership.</p> |

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

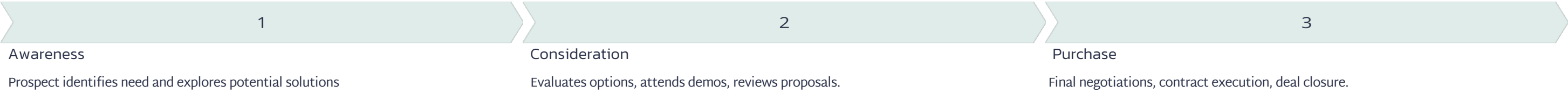
Full Access

- 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

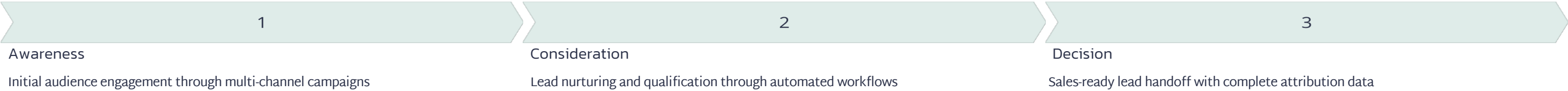
Full Access

- 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

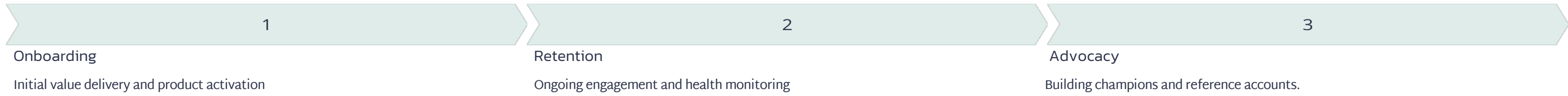
- Customer health dashboard
- Product usage logs
- Support ticket history
- Success plans
- Financial data requires authorization

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.

Lack of Context

Agents struggle to piece together customer history across fragmented interactions, leading to repetitive questions and frustrated customers.

Primary Goals

Resolve cases quickly and accurately, maintain high customer satisfaction (CSAT) scores, minimize escalations to senior support tiers, Build customer trust through effective communications

Slow Knowledge Retrieval

Finding the right information requires searching multiple systems, increasing handle time and reducing confidence in answers.

System Switching

Constant toggling between tools disrupts workflow, creates errors and extends resolution time unnecessarily.

System Access & Permissions

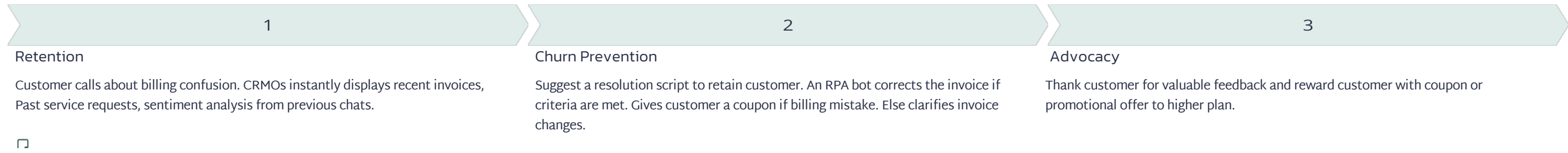
Full Access

- View case history and customer profiles
- Edit case status and notes.
- Limited escalation rights within defined thresholds
- Chatbot interface
- Knowledge hub and service requests

Essential Technology Stack

- AI Suggestion Engine
- Service cloud
- Knowledge based
- Chatbot interface
- Screen pop

Engagement Journey



Billing Confusion Resolution

A customer calls confused about their latest invoice. THE CRMOS system instantly displays recent invoices past service requests, and sentiment analysis from previous chat interactions. AI suggests a resolution script tailored to the issue. If the situation meets predefined criteria, an RPA bot automatically correct the invoice- no manual intervention required. The agent confirms the fix, explains the adjustment, rewards the customer with coupon, and closes the case in under three minutes. He also advocates for service upgrade and higher plan offerings.

Data Quality Assurance

Maintains accuracy, completeness, and reliability of data across all enterprise systems and platforms

Metadata Consistency

Ensures standardized definitions, naming conventions, and documentation throughout the data ecosystem.

Governance Adherence

Enforces data policies, compliance requirements, and organizational standards across all data operations.

Real-World Scenario: Crisis Response



System Access & Permissions

Access

- Data Catalog Access: Read and write privileges to document datasets, schemas, and metadata definitions across the organization
- Anomaly Flagging: Authority to mark data quality issues, inconsistencies, and policy violations for investigation and remediation.
- Schema Change Approval: Reviews and authorizes modifications to data structures, ensuring alignment with standards and impact assessment
- Production Data Restrictions: Cannot directly modify live production data, maintaining separation of duties and protecting data integrity.

Essential Technology Stack

- Data Catalog: Central repository for discovering, documenting, and managing metadata, schemas, and data lineage across systems
- Master Data Management System: Platform for creating and maintaining the single source of truth for critical business entities and reference data.
- Data Quality Monitoring Tool: Automated solution for continuous assessment of data accuracy, completeness, consistency, and adherence to rules.
- SQL IDE: Integrated development environment for querying databases, analyze data patterns and validating data transformations.

Engagement Journey



Cross-Functional Impact

Data Stewards engages across all lifecycle stages, making their role truly cross-cuttings. They ensure data quality from initial capture through archival, serving as the connective tissue between systems, teams, and business objectives.

Core Responsibilities

Ensures organizational adherence to critical regulations including GDPR, CCPA, SOX, and emerging AI Act requirements across all business operations.

Primary Goals

Prevent regulatory penalties, maintain continuous audit readiness, enforce consent policies, and oversee ethical AI deployment throughout the organization

Critical Challenges

Managing reactive audits, addressing inconsistent policy enforcement, implementing automated controls, and navigating the growing complexity of global privacy laws.

System Access & Permissions

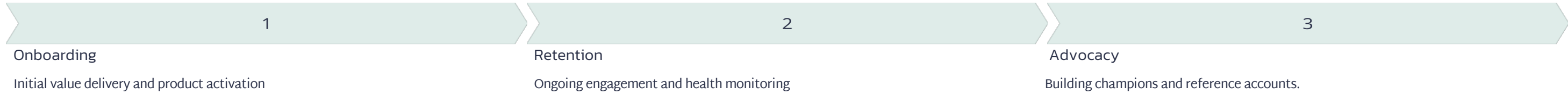
Full Access

- Comprehensive audit log access
- Consent management module control
- AI model transparency reports
- Investigation initiation authority
- Workflow oversight (approval-based override)

Essential Technology Stack

- GRC Platform Integration
- eDiscovery Tools
- Consent Management Platform (CMP)
- Log Aggregation Systems
- Regulatory reporting dashboards

Engagement Journey



Real-World Application: Right to be forgotten

When a customer submits a “Right to Be Forgotten” request, the CRMOS system automatically locates all personal data across integrated modules, anonymizes records systematically, logs every actions for compliance verification, and generates a certified compliance report. Thus completing the entire process within 48 hours while maintaining full audit trail integrity.

Core Responsibilities

Build, train, deploy, and continuously monitor machine learning models that power critical predictions and automations throughout the customer lifecycle.

Primary Goals

Maintain model accuracy and performance, detect and respond to data drift, enable automated retraining pipelines, and ensure model explain ability for compliance and trust

Access & Permissions

Full access to Model Registry, Feature Store, Training Pipelines, and MLOps Dashbaord.
Restricted access to raw PII data to ensure compliance.

Critical Pain Points

Integration Challenges

- Poor feature store integration hampers model development and creates data inconsistencies across environments

Monitoring Gaps

- Lack of proactive monitoring alerts delays detection of model degradation and performance issues

Reproducibility Issues

- Difficulty reproducing model behavior across environments undermines debugging and compliance efforts

Business Alignment

- Unclear business impact metrics make it challenging to demonstrate ROI and prioritize model improvements

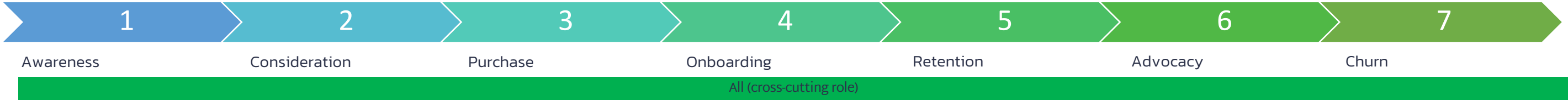
Technical Stack

- Python ecosystem for model development
- Jupyter Notebooks for experimentation
- Mlflow for experiment tracking
- TensorFlow/PyTorch frameworks
- CI/CD pipelines for ML deployments
- Prometheus/Grafana for monitoring

Lifecycle Engagement

- AI/ML engineers operate across all lifecycle stages, as model-driven decisions influence every phase from prospect identification through customer retention and expansion.

Engagement Journey



Cross-Functional Impact

Data Stewards engages across all lifecycle stages, making their role truly cross-cuttings. They ensure data quality from initial capture through archival, serving as the connective tissue between systems, teams, and business objectives.

Core Responsibilities

Evaluates vendor solutions, negotiates contracts, ensures, cost efficiency and contractual compliance across enterprise GRC platforms.

Primary Goals

Reduce total cost of ownership, align software spend with business outcomes, ensure service level agreements are enforceable and measurable

Critical Challenges

Difficulty measuring ROI of complex platforms, opaque licensing models, lack of usage based metrics, extended negotiation cycles.

System Access & Permissions

Granted Access

- License utilization reports and analytics
- KPI dashboards with real-time metrics
- Contract repository and documentation
- Vendor performance scorecards

Restricted Functions

Cannot modify technical configuration or system settings. Role focused on strategic oversight rather than operational implementations

Engagement Journey



Critical Pain Points

ERP Procurement Module

- Central system for purchase orders and vendor management

Contract Lifecycle Management

- CLM platform for agreement tracking and renewal alerts

Spend Analytics Tools

- Cost optimization and budget forecasting solutions

Vendor Scorecards

- Performance evaluation and compliance monitoring

Use case: Contract Renewal Optimization

CRMOS provides a configurable ROI dashboard demonstrating \$xM in annual savings from compliance automation. The Procurement Analyst leverages this quantifiable data to justify platform renewal and negotiate volume discounts based on projected organizational growth and expanded usage patterns.

Core Responsibilities

Executive accountable for end-to-end revenue generation across sales, marketing and customer success functions. Orchestrates unified go-to-market strategy and cross-functional alignment

Primary Goals

Drive predictable revenue growth, optimize funnel efficiency, and unify departmental strategies. Ensures revenue operations align with organizational goals and market opportunities.

Critical Challenges

Addresses misalignment between departments, reliance on lagging indicators, and difficulty attributing results to specific initiatives. Requires real-time visibility into performance metrics.

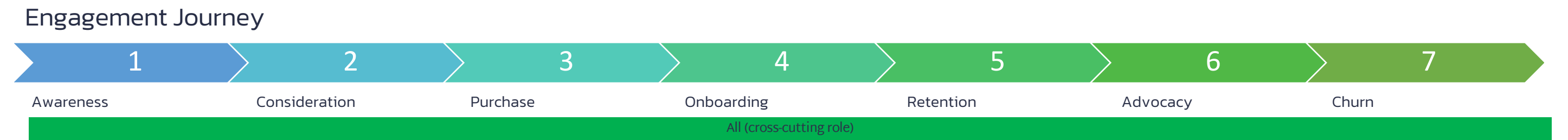
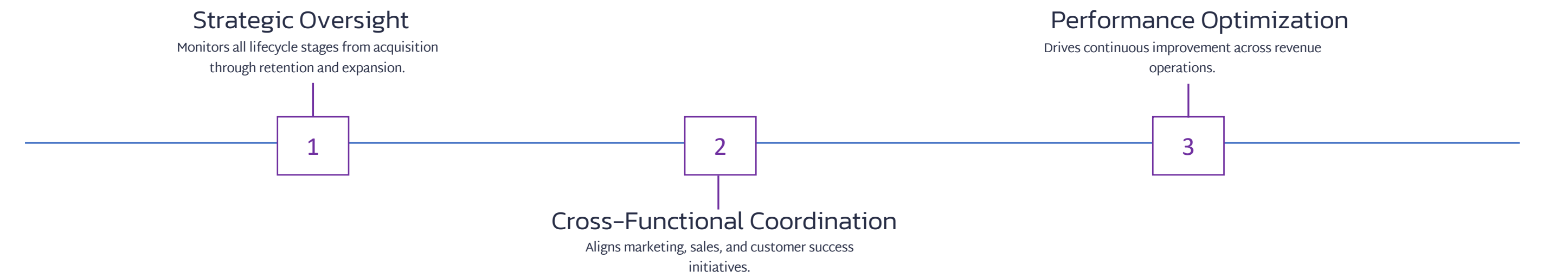
System Access & Permissions

Full Access

Executive-level dashboards with cross-functional KPIs predictive forecasts, and anomaly detection alerts. Full audit access across revenue operations and compliance tracking systems.

Essential Technology Stack

Business Intelligence platforms, revenue intelligence tools, CRM analytics, and strategic planning software for comprehensive oversight and decision-making



Real-World Application Scenario

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.