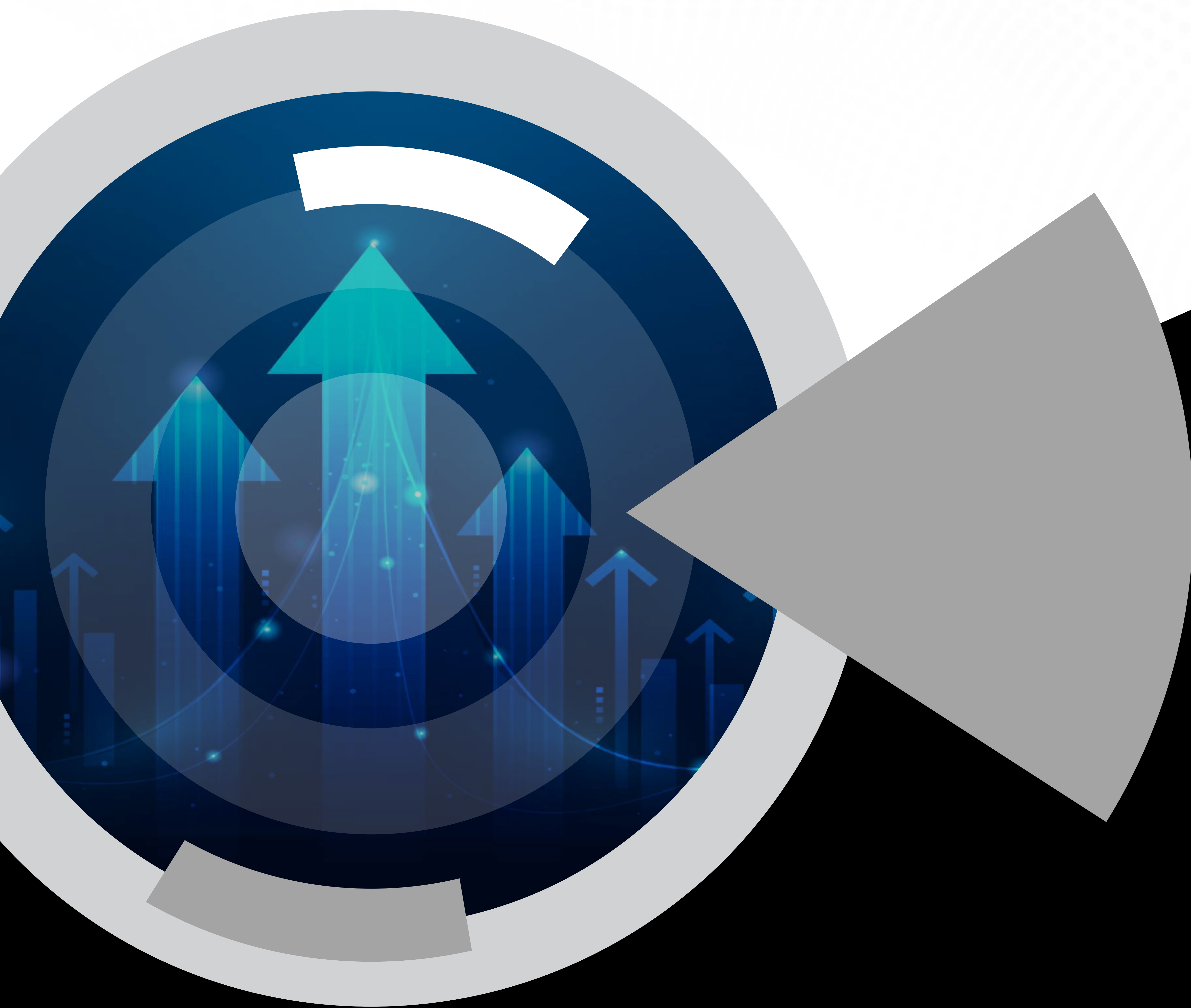




Circle CRM

Your AI-Powered Business Growth Engine



Smart. Predictive.
Unified.

Contact Us At

✉ info@circlecrm.ai

🌐 circlecrm.ai

Why Most CRMs Fail Growing Teams

- Scattered Customer Data Across Tools
- Missed Follow-Ups & Lead Leakage
- No Real-Time Sales Insights
- Manual Proposal Creation
- Disconnected Communication
- Complex UX = Low Adoption

It's Time For A CRM That Thinks, Automates, And Helps You Grow.

Circle CRM — Built For Performance, Powered By AI

Old Way

- Manually Track Leads
- Disconnected Tools
- Slow Proposal Process
- No Insights
- Difficult Onboarding

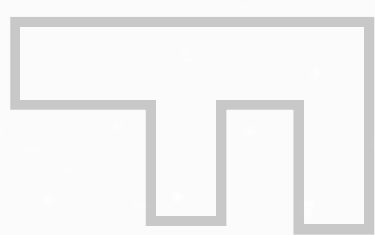
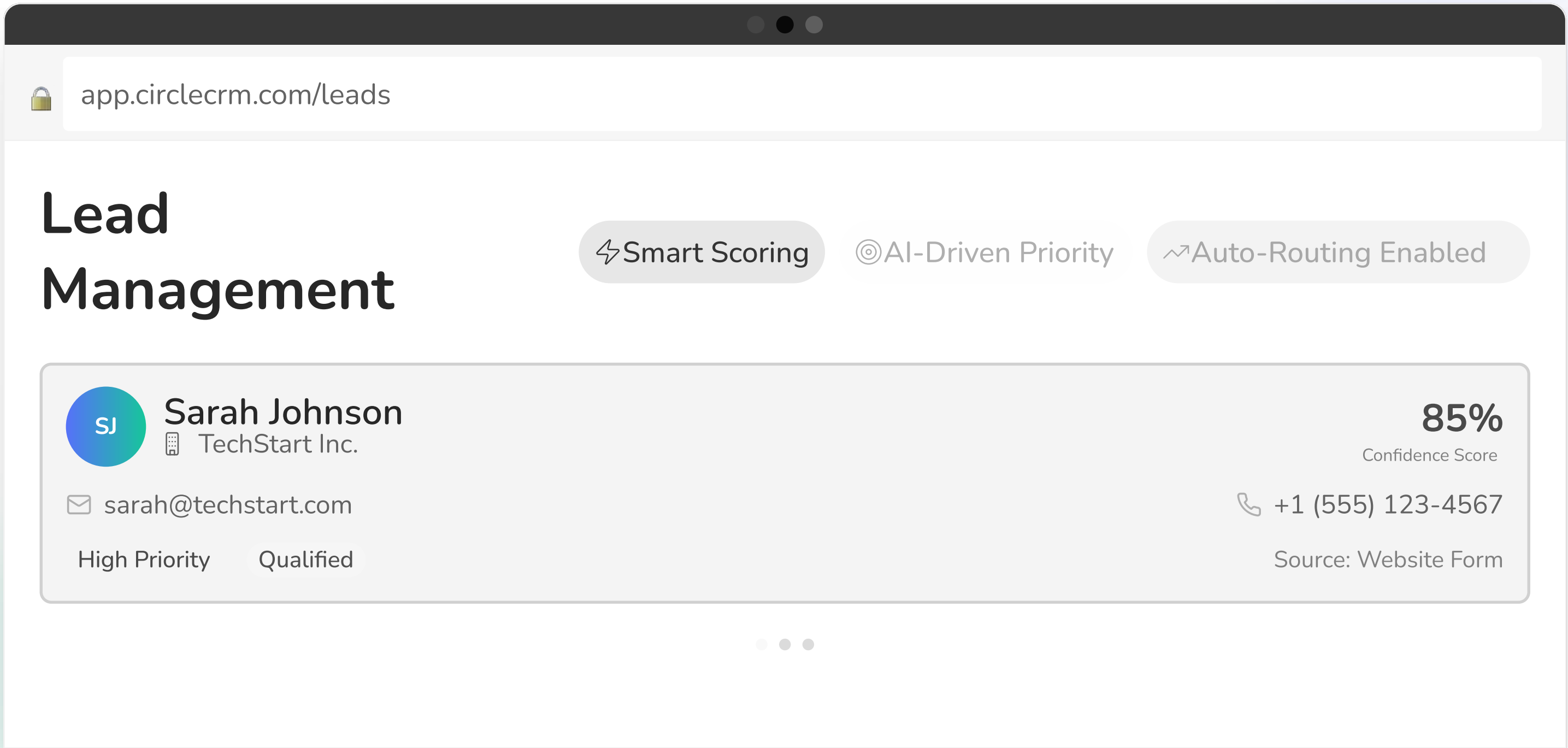
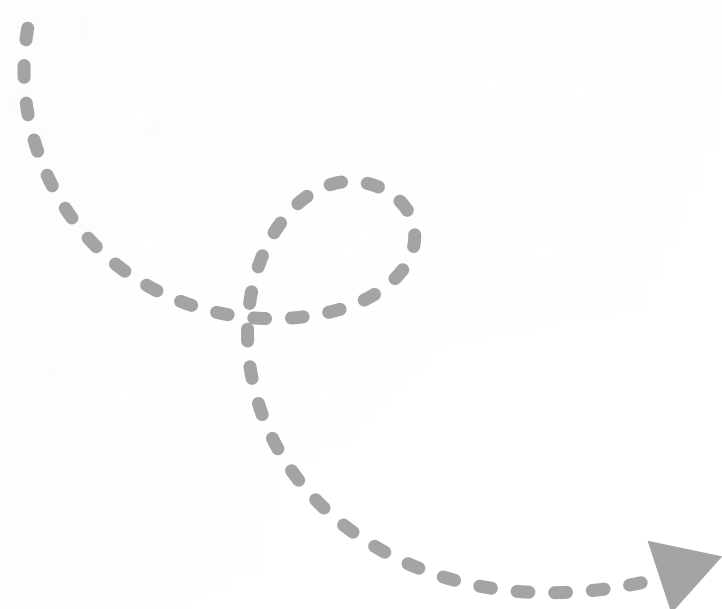
Circle CRM Way

- AI-Powered Lead Scoring & Alerts
- Unified Sales + Marketing Platform
- Instant, Customizable Proposal Engine
- Real-Time Dashboards And Reports
- Clean UX & Mobile-First Design

All-In-One CRM That Works The Way You Do

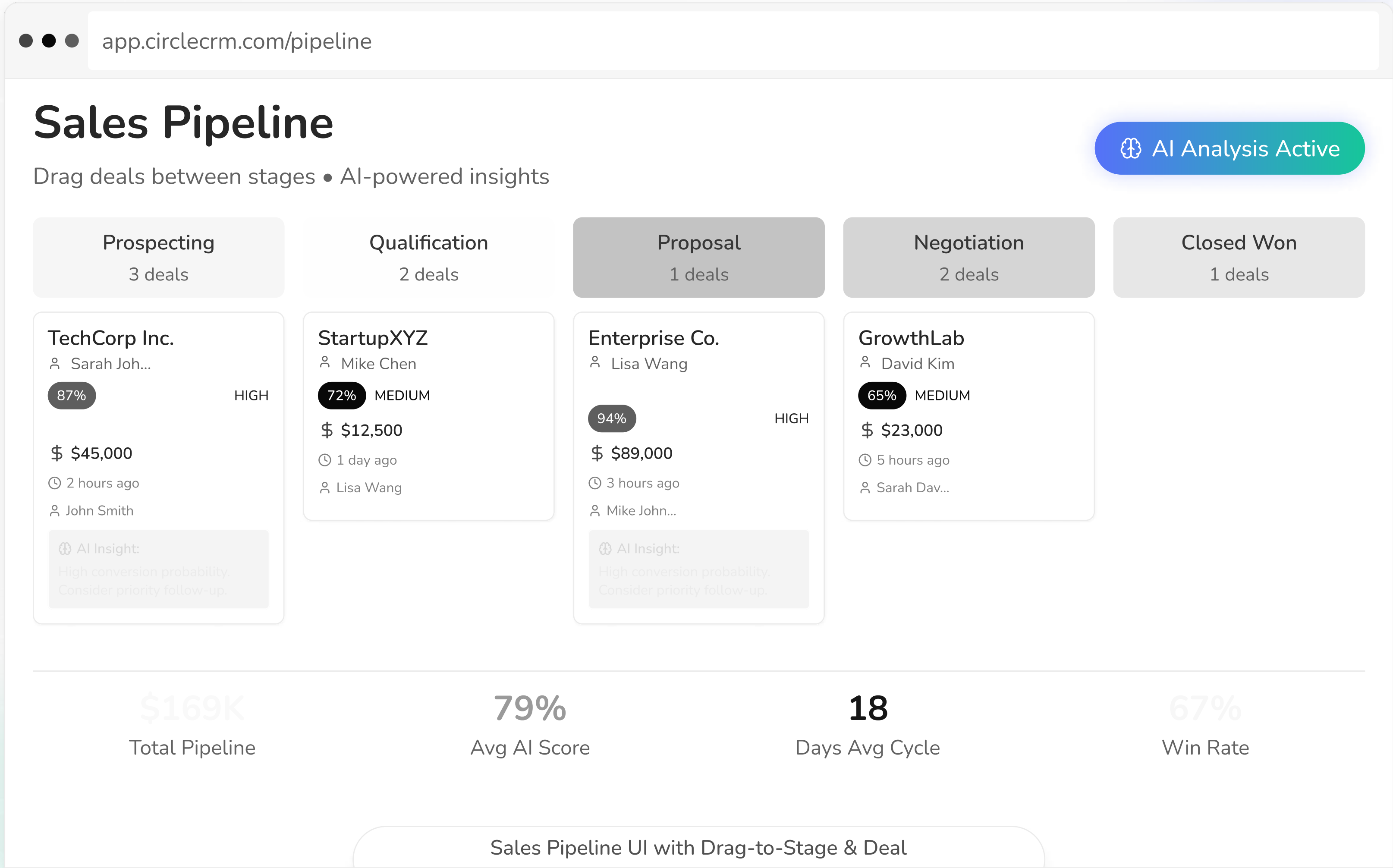
01

AI-Powered Lead Scoring



02

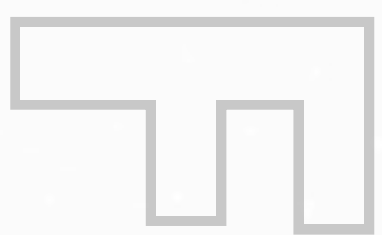
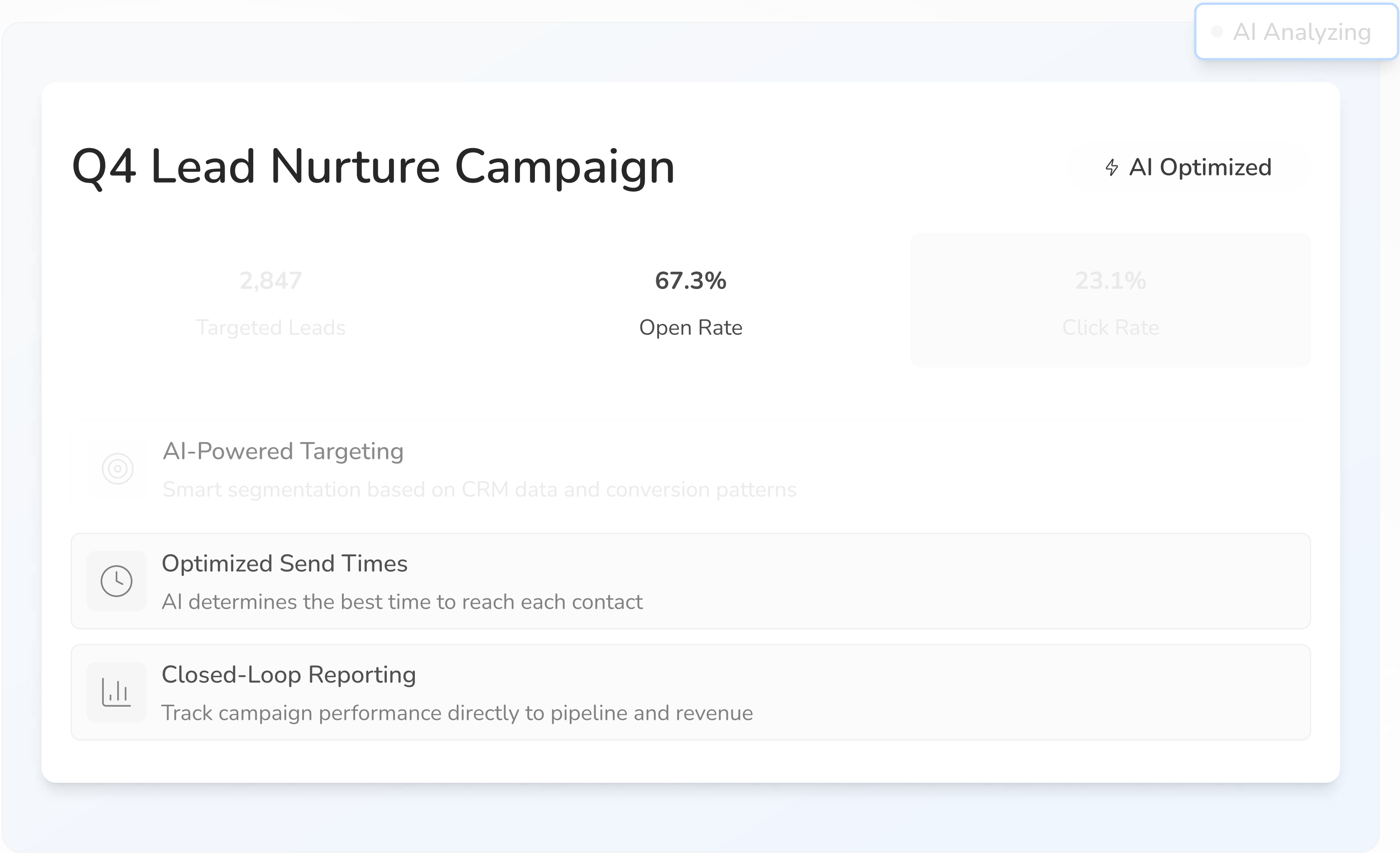
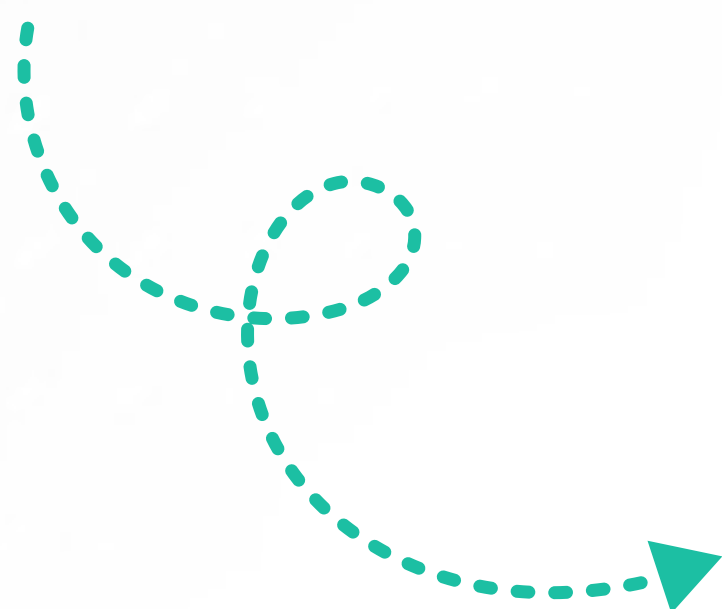
Smart Sales Pipeline



All-In-One CRM That Works The Way You Do

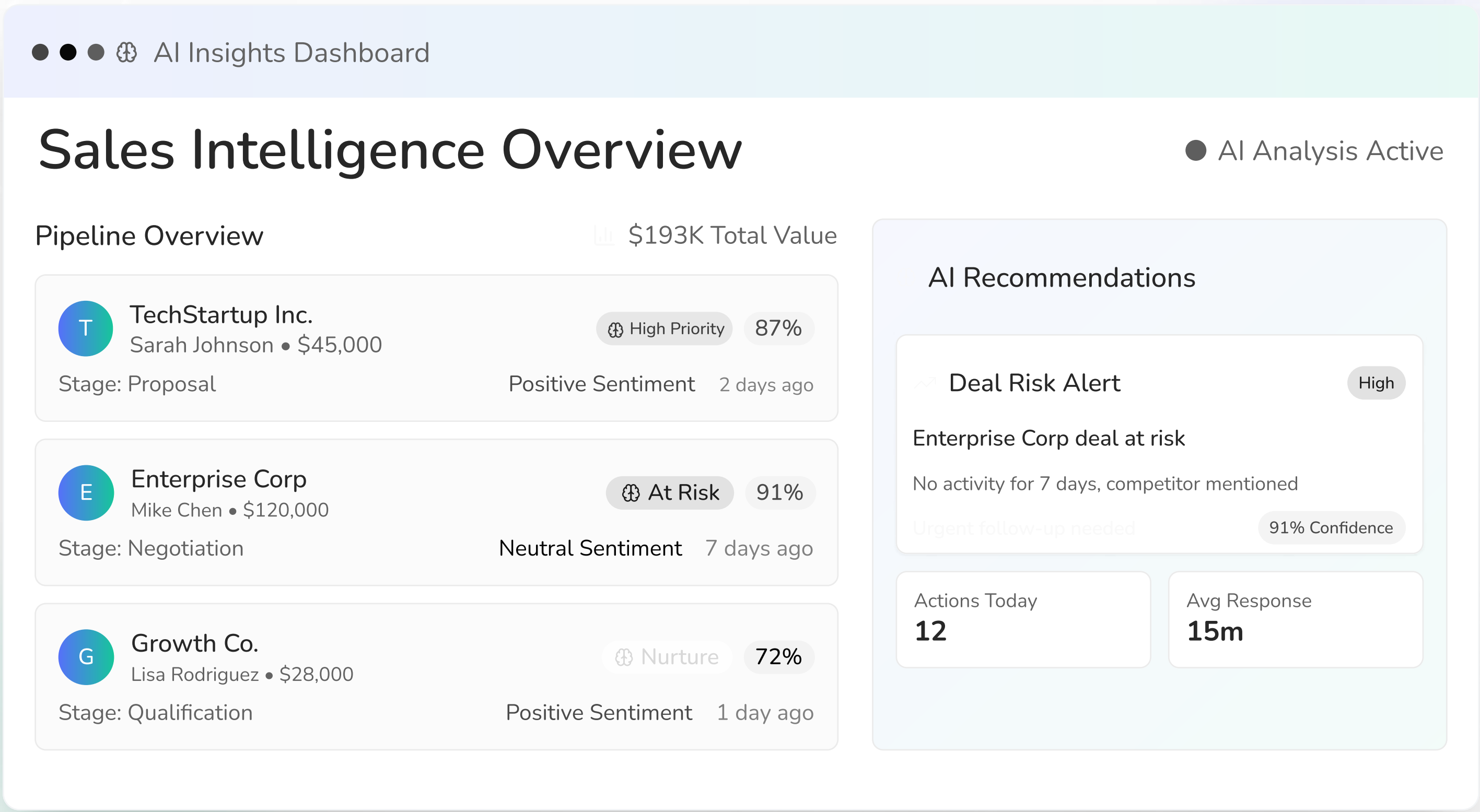
03

Automation & Triggers



04

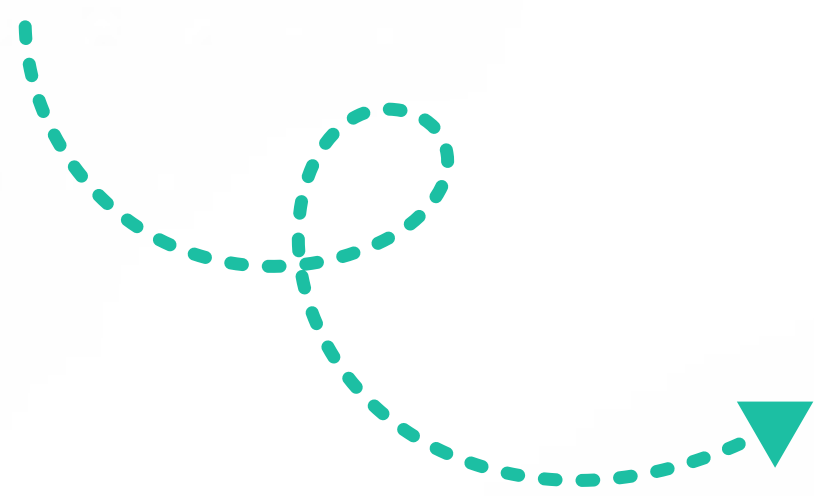
Forecasting Engine



All-In-One CRM That Works The Way You Do

05

Task & Calendar Management



CRM Configuration

Pipeline Setup

Field Configuration

Permission Assignment

AI Recommendations

Sales Pipeline

Custom

Lead	25%
Qualified	20%
Proposal	15%
Negotiation	10%
Closed Won	5%

AI Recommendation

Consider adding a "Demo Scheduled" stage between Qualified and Proposal for better tracking.



06

Time Tracker



Time Tracker

Track time on any activity

Running

Current timer:

01:42:37

Deal:

Enterprise Solutions Proposal

Activity:

Proposal Preparation

Billable:

Yes

Stop

Pause

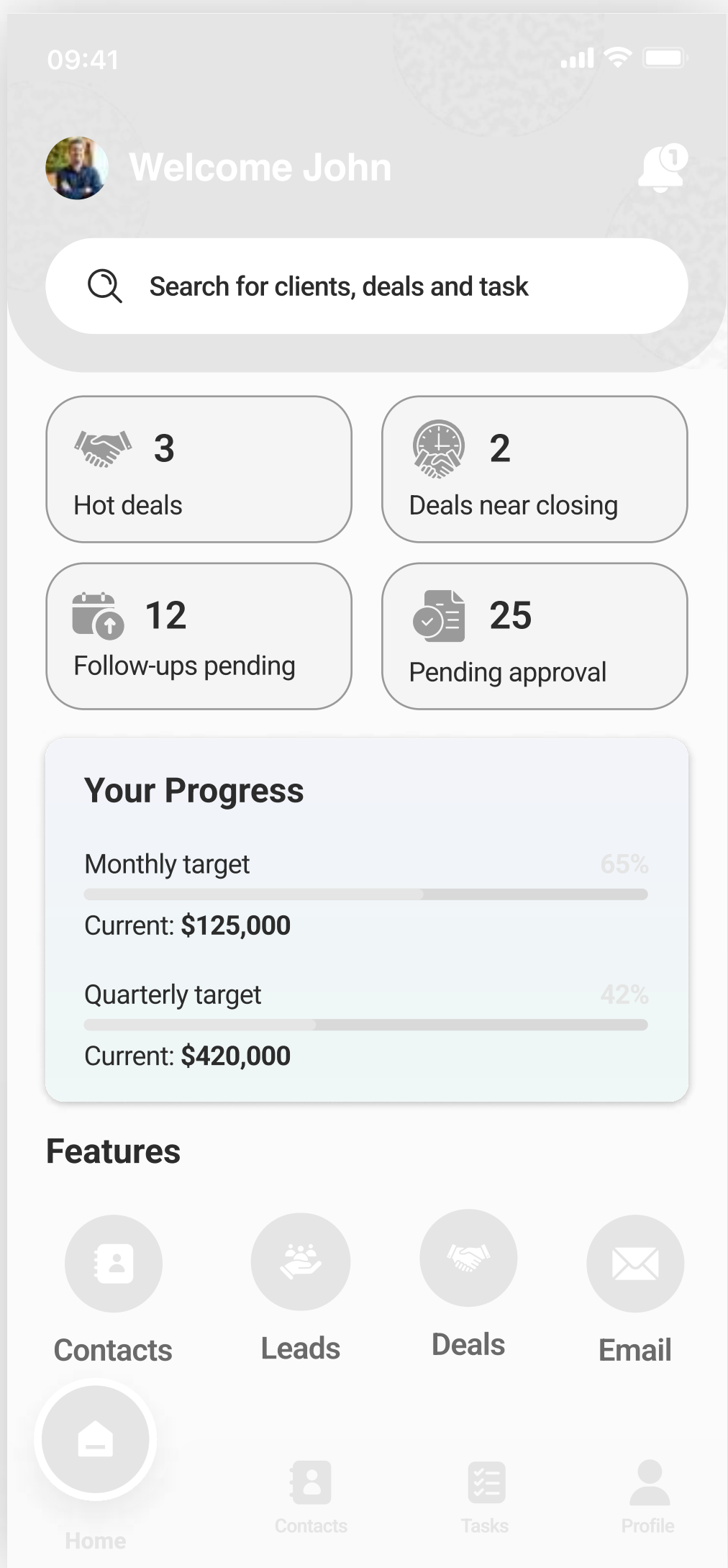
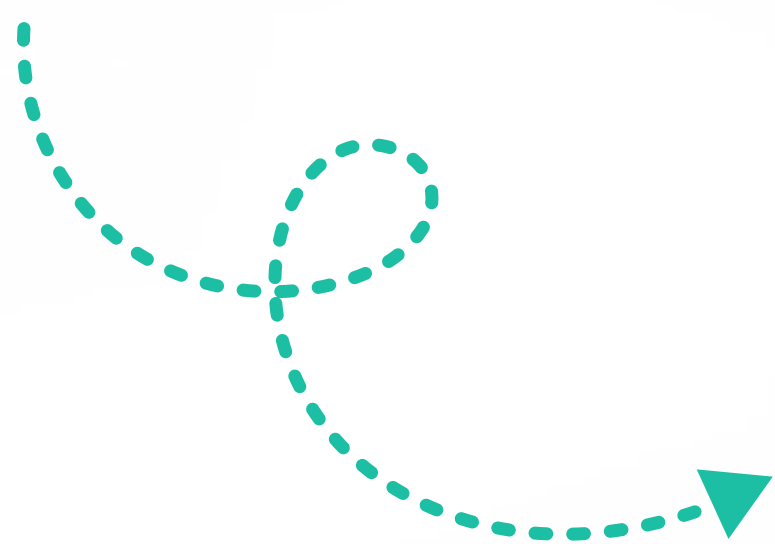
AI Productivity Insight

You're spending 35% more time on proposals than your highest-performing peers. Consider using our AI-powered proposal templates to reduce time investment.

All-In-One CRM That Works The Way You Do

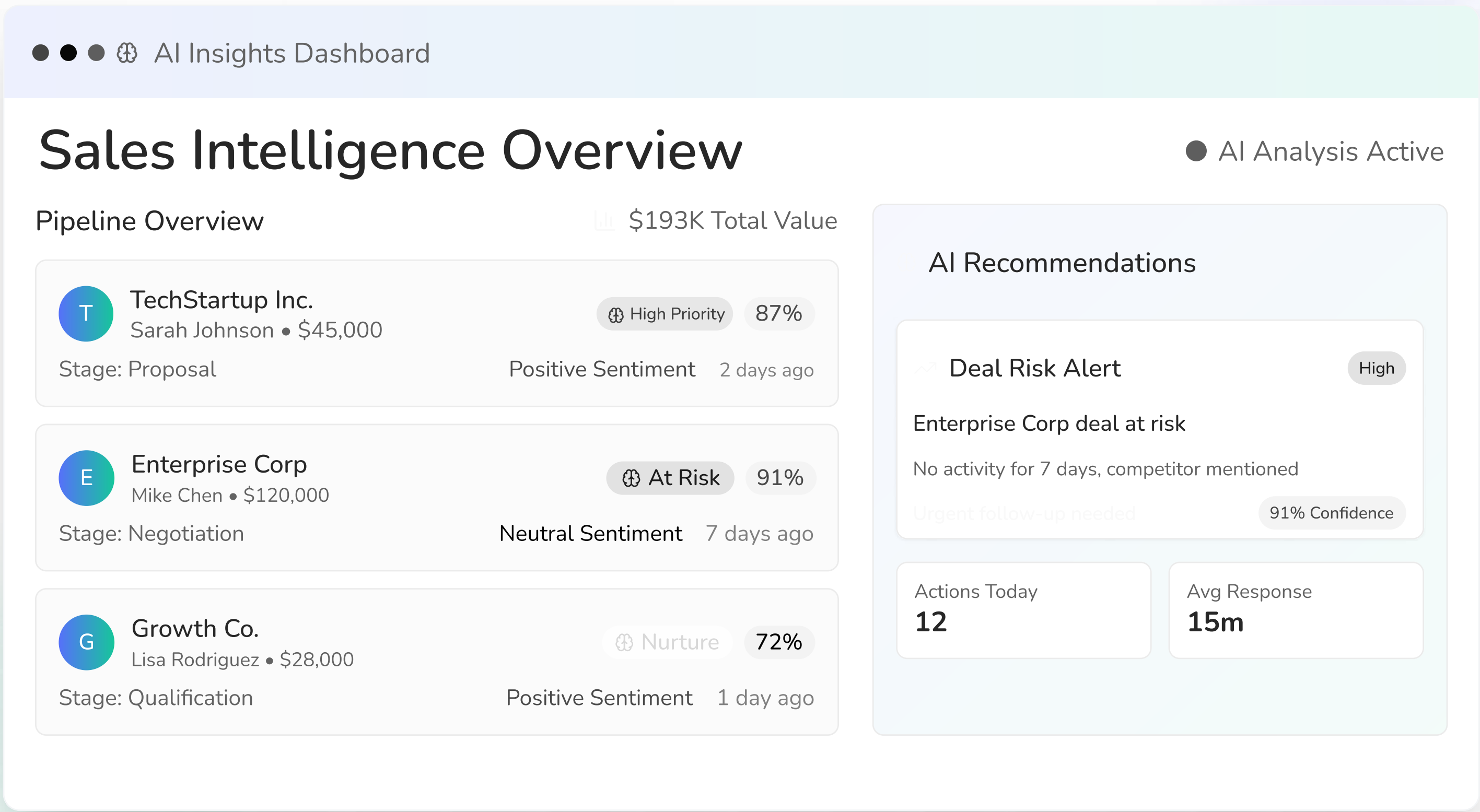
07

Mobile CRM Access



08

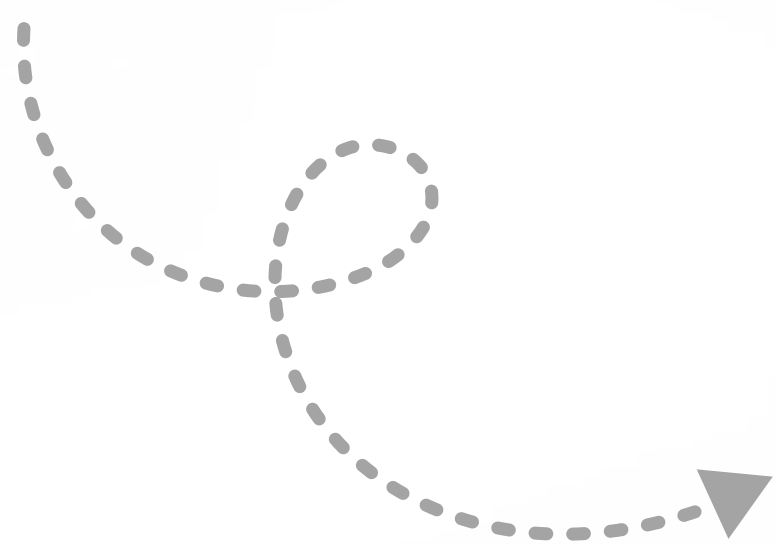
Confidence Scoring



All-In-One CRM That Works The Way You Do

09

AI-Powered Up And Cross Sale Suggestions



Opportunity: Enterprise Solutions Package

Acme Corporation

AI Recommendations

Social Media Bundle

94% match for this customer profile

+ Add

Premium Support

87% match based on similar deals

+ Add

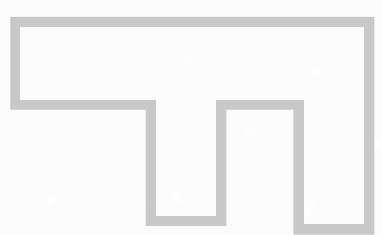
Advanced Analytics

76% match for enterprise clients

+ Add

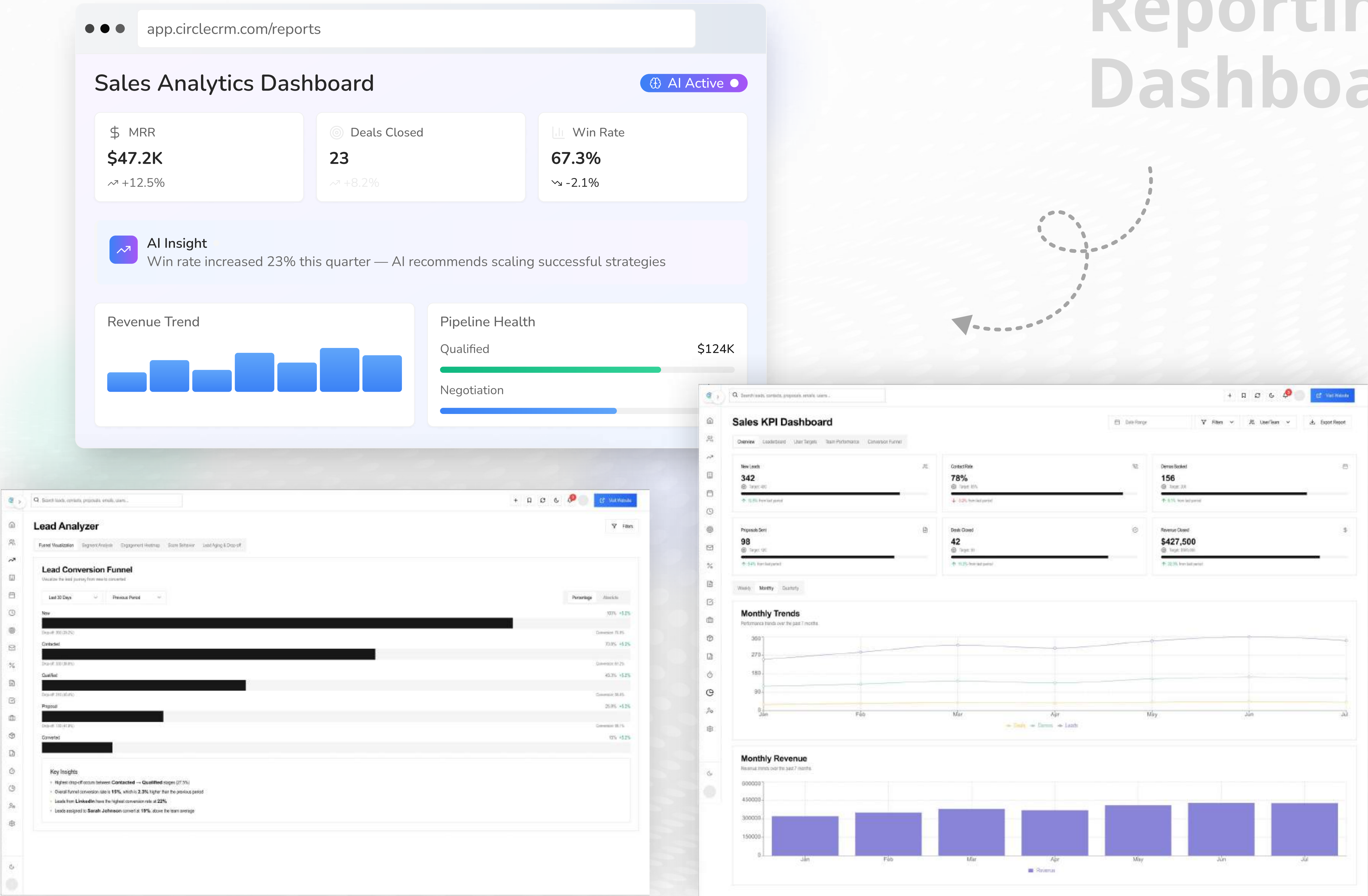
Recommendations based on 247 similar deals

+ Add to Proposal



10

Reporting & Dashboards



Why Use Many Tools, When One Does It All?

Lead Sourcing Partners

 Apollo.io

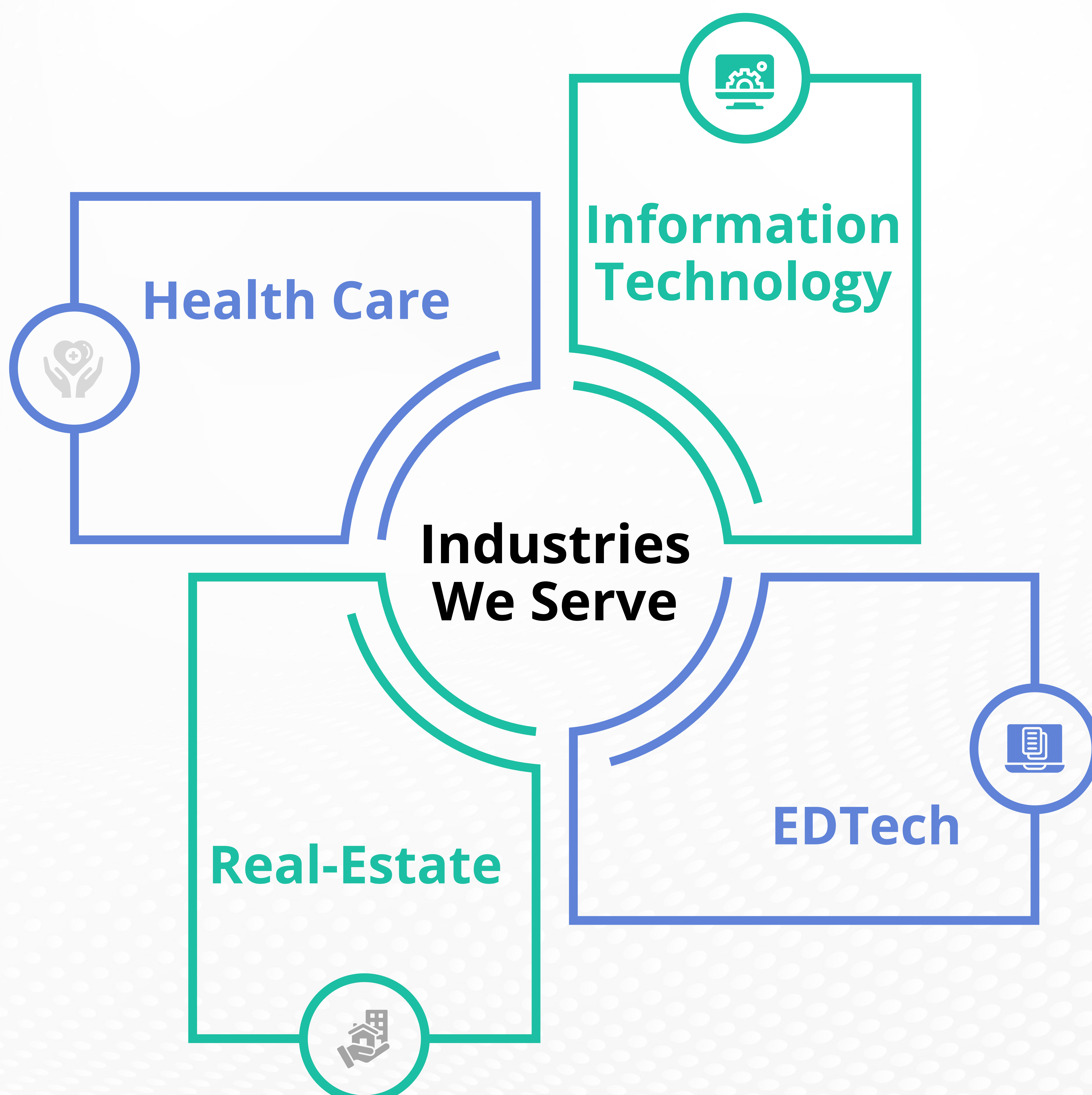
crunchbase



 Lusha

 Clearbit

 zoominfo



Smarter Follow-Ups With AI

Email Received From Client

john.deo@example.com

Subject: Following Up on Our Product Demo Discussion

Hi John,

I hope this email finds you well. We discussed our product features during our last call and I'd like to follow up on the demo we talked about.

Best regards, Mike

AI Suggestions

I hope you're doing well. During our last call, we went over the product features, and I'd like to follow up to see if we can schedule the demo we discussed. Please let me know a convenient time for you.

As discussed in our previous call, I'd like to move forward with the demo to give you a hands-on look at the product features. Could you please suggest a time that works best for you this week?

Timeline

Jennifer Lee

Hi John, attached is the detailed proposal with milestone breakdown....

Michael Brown

Discussed pricing and integration options. Seemed positive....

Jennifer Lee

The client requested another demo next week. Schedule and send....

AI That Helps You Close More Deals, Faster

Highlights

- 01 Predictive Lead Scoring
- 02 Smart Proposal Recommendations
- 03 Deal Confidence Analyzer
- 04 Churn Risk Alerts
- 05 Campaign Content Suggestions
- 06 Next Best Action Engine

Circle CRM Doesn't Just Organize—It Thinks, Recommends, And Predicts

Real Impact On Revenue & Productivity

Metric Grid

KPI	Impact
Lead Conversion	↑ 25%
Proposal Time	↓ 40%
Forecast Accuracy	↑ 30%
Sales Cycle	↓ 15%
User Adoption	90% Active Daily Users

Track What Matters — From Lead To Closed Deal

One CRM. Many Roles. One Unified Platform.

User Personas

Sales Reps

Track Leads, Send
Proposals, Close Faster

Sales Managers

Monitor Pipeline,
Forecast Revenue

Marketers

Run Campaigns,
Measure ROI

Executives

View High-Level
KPIs And Insights

Support Teams

Access Customer
History Instantly

Collaboration And Alignment Across Departments.

Why Circle CRM Beats Traditional Tools

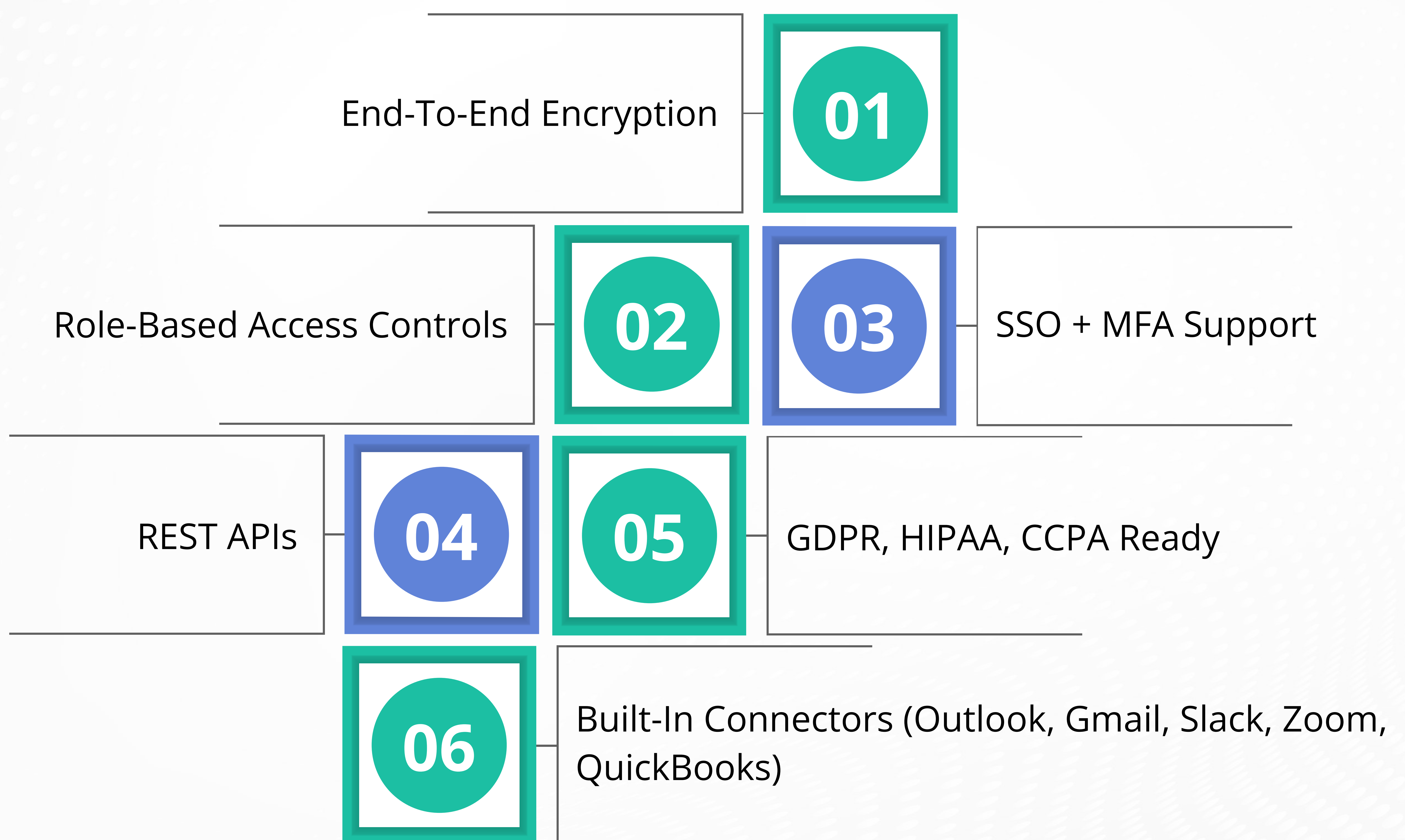
Comparison Table

Features	Circle CRM	Traditional CRMs
AI Recommendations	✓	✗
Proposal Automation	✓	✗
Unified Sales & Marketing	✓	◆ Partial
Lead Imports (Apollo, Lusha)	✓	✗
Mobile-First UX	✓	✗ Limited
Real-Time Dashboards	✓	✗ Delayed

One Platform. Multiple Business Wins.

Enterprise-Grade Security & Integration

Highlights



Designed To Plug Into Your Ecosystem — Securely

Cloud Or On-Prem — You Decide

Comparison Table

Features	Cloud	On-Prem
Hosting	Managed	Customer-Side
Security	End-To-End	Full Control
Setup Time	Instant	Custom Rollout
Maintenance	Auto	Self-Managed
Access	Global	VPN/Firewall Based
Compliance	ISO/GDPR	ISO/GDPR

Flexibility For SMBs And Enterprises Alike

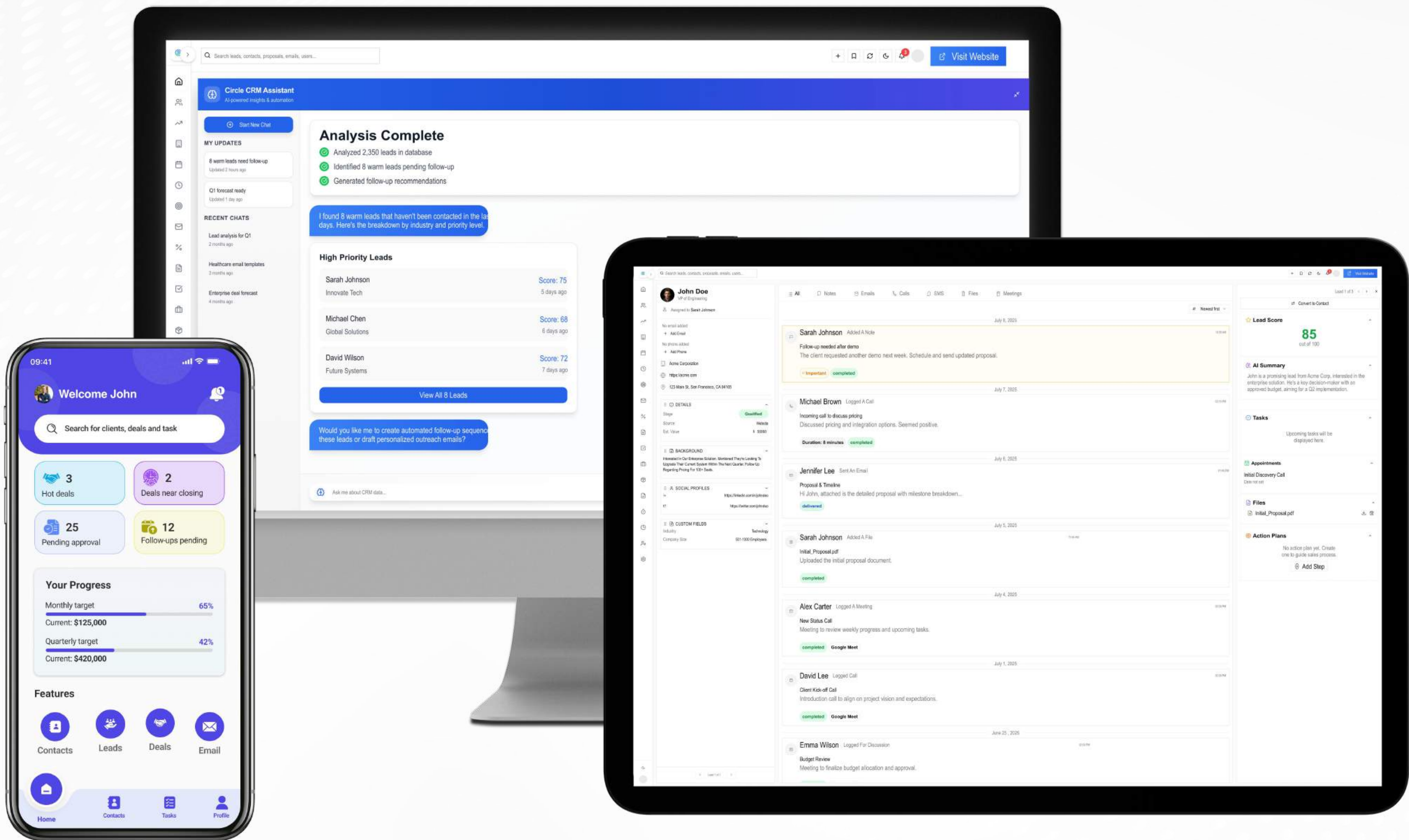
Industry-Specific Customization, Out-Of-The-Box

Industry	Specialized Modules
Healthcare	Patient Pipeline, Compliance, Referral Tracking
Real Estate	Property Follow-Ups, Buyer-Matching, Closing Tracking
IT & SaaS	Trial Tracking, Demos, Feature Requests
Finance	KYC Tracking, Investment Funnel, Audit Logs
E-Commerce B2B	Order-Based Workflows, Returns, Distributor CRM
Education	Admission Flows, Parent Communication
Recruitment	Candidate Journey Tracking, Resume Vault

Forms, Dashboards, Workflows — All Aligned To Your Business Logic



Ready To Scale With Circle CRM?



Book A Demo

Contact Us

✉ info@circlecrm.ai

🌐 circlecrm.ai

Scan To Explore

