Circle CRM

Circle CRM

Your AI-Powered Business Growth Engine

Smart. Predictive. Unified.

Contact Us At

info@circlecrm.ai

circlecrm.ai

Circle CRM

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.

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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

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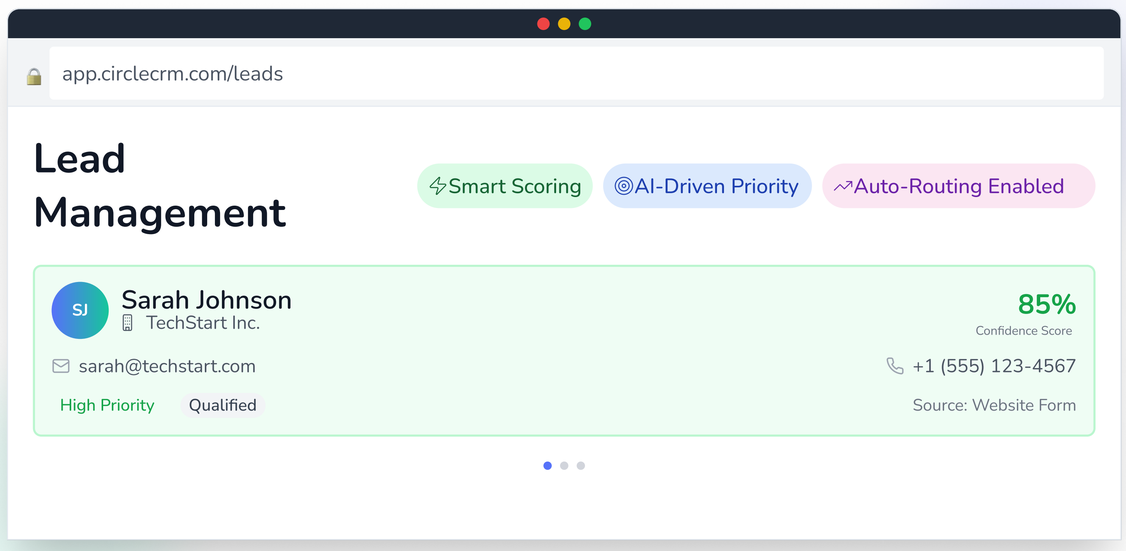
All-In-One CRM That Works The Way You Do

01

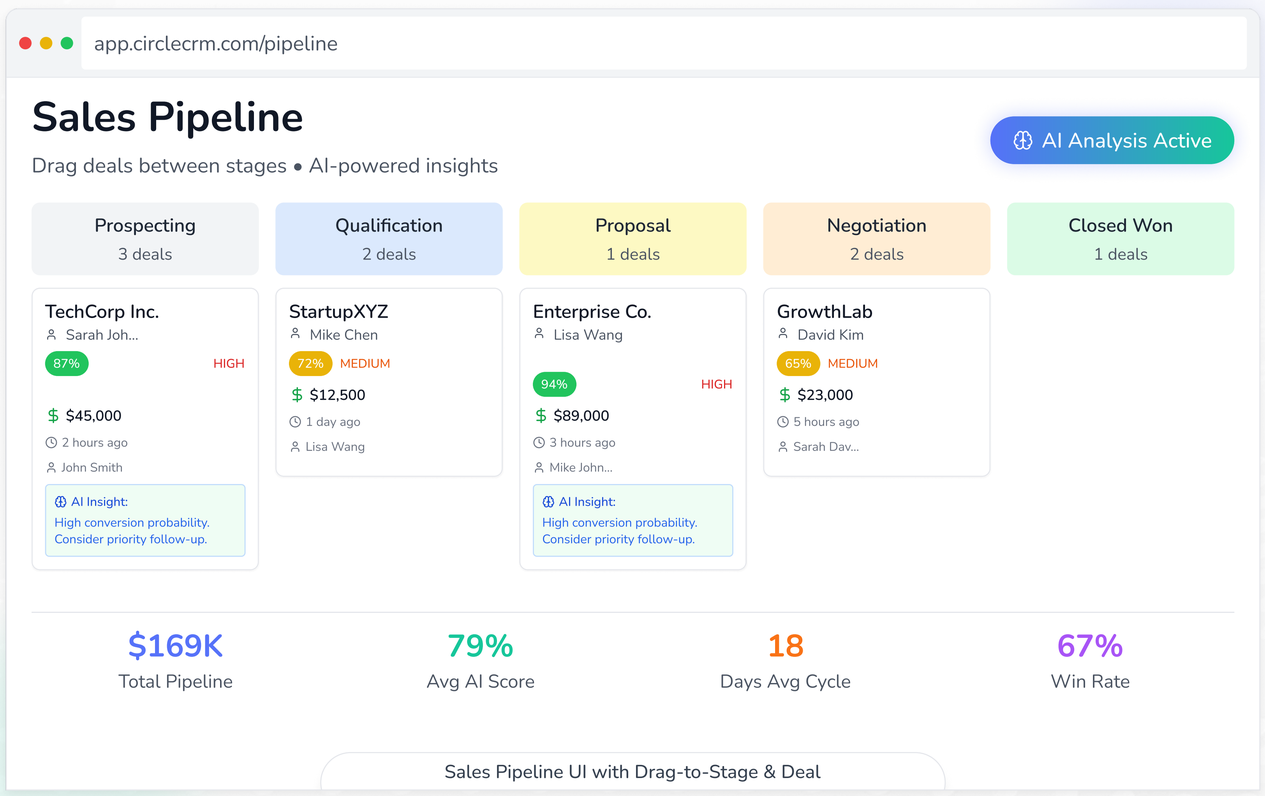
AI-Powered Lead Scoring



Sales

02

Smart Sales Pipeline



Sales Pipeline UI with Drag-to-Stage & Deal

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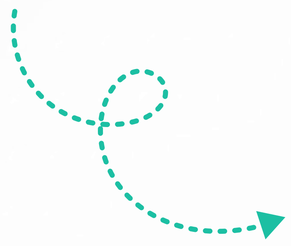
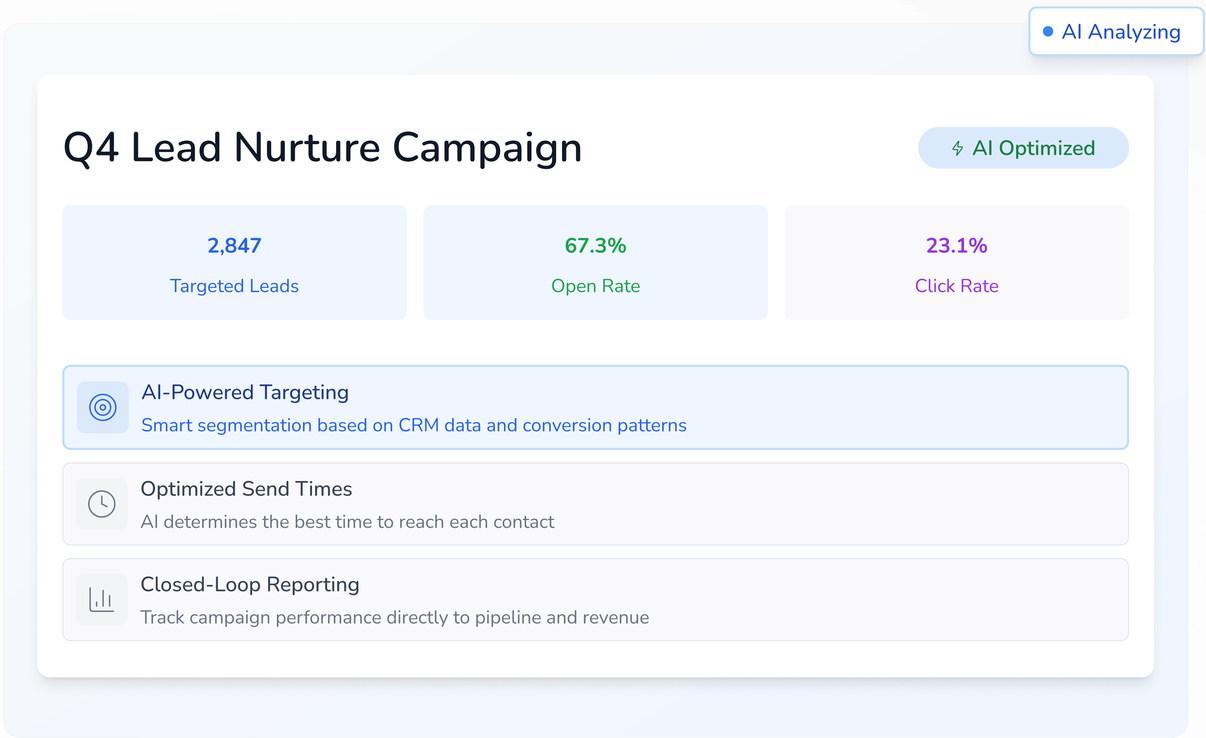
All-In-One CRM That Works The Way You Do

03

Automation & Triggers

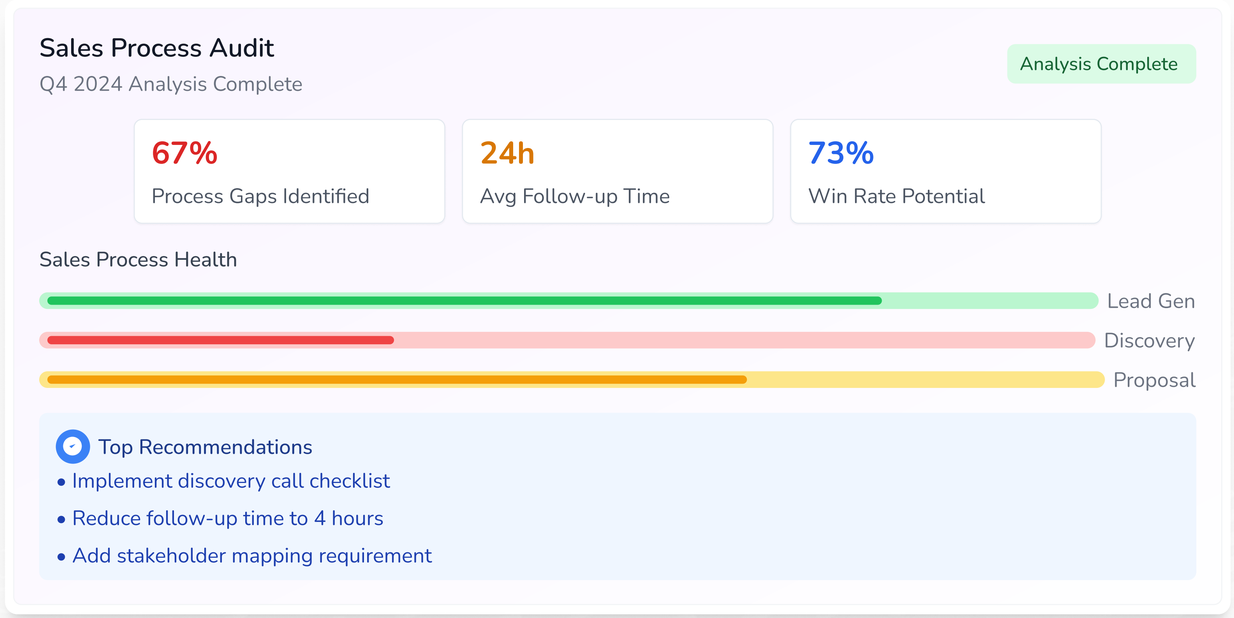




Sales

04

Sales Audit



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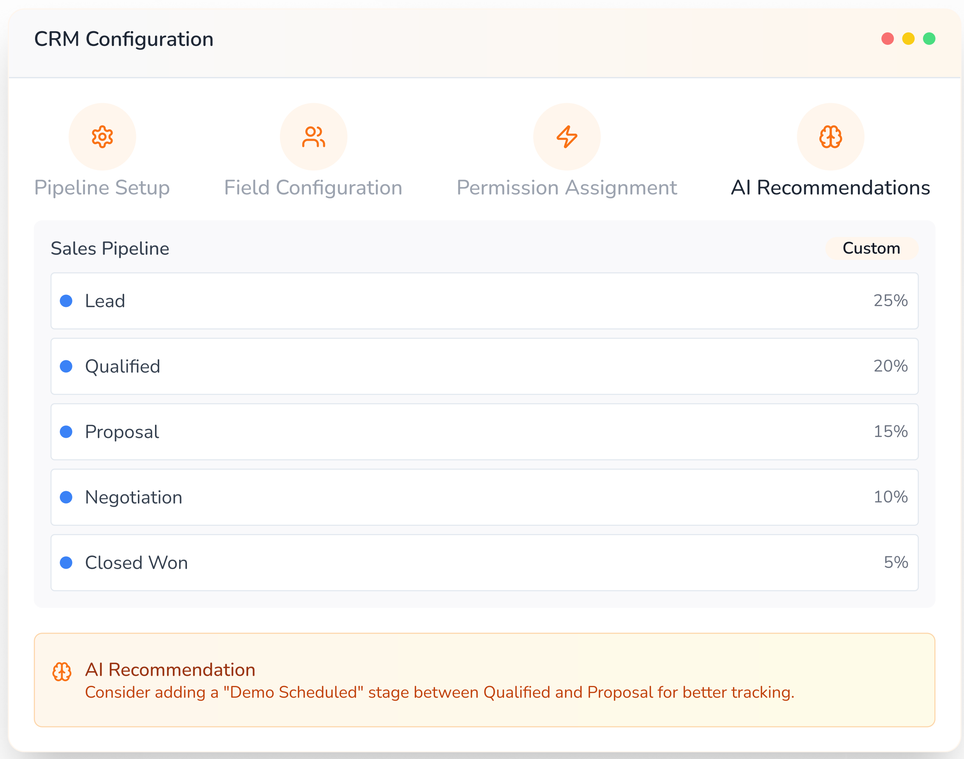
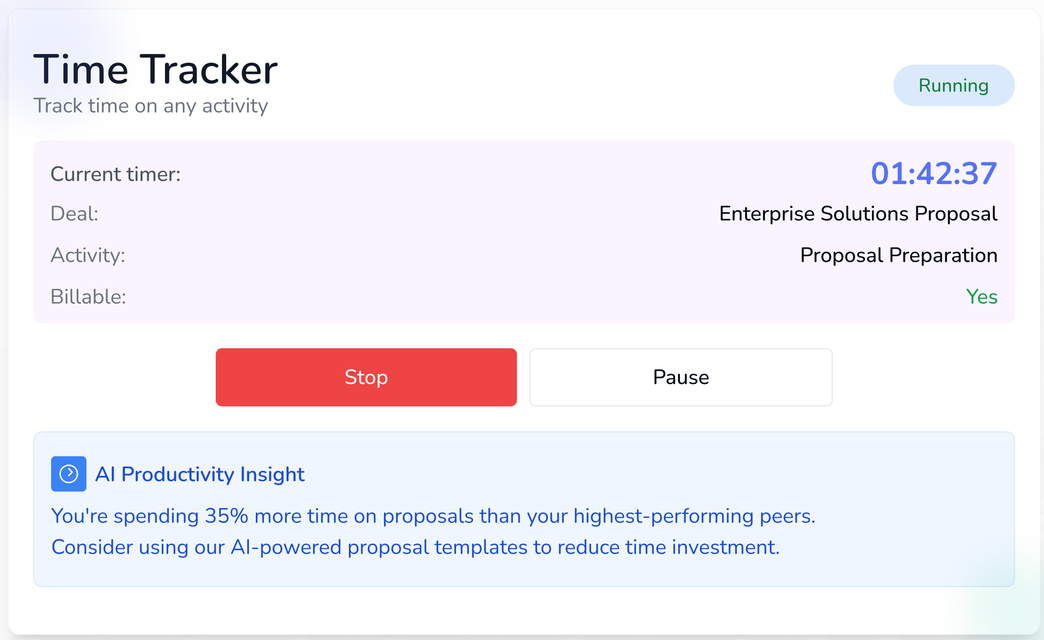
05

Task & Calendar Management



06

Time Tracker



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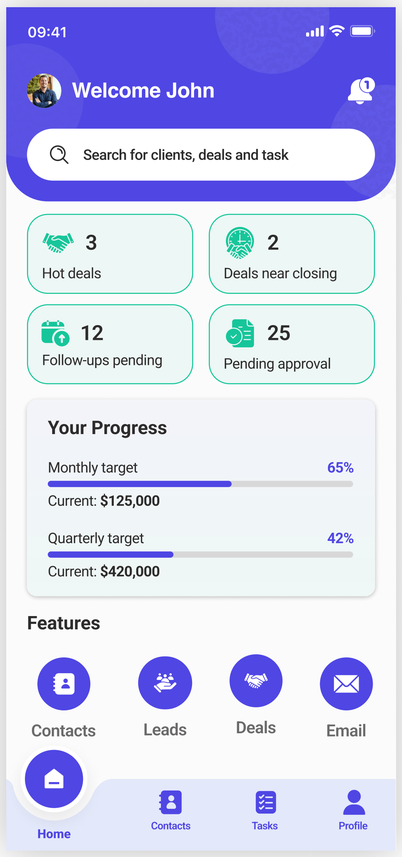
All-In-One CRM That Works The Way You Do

07

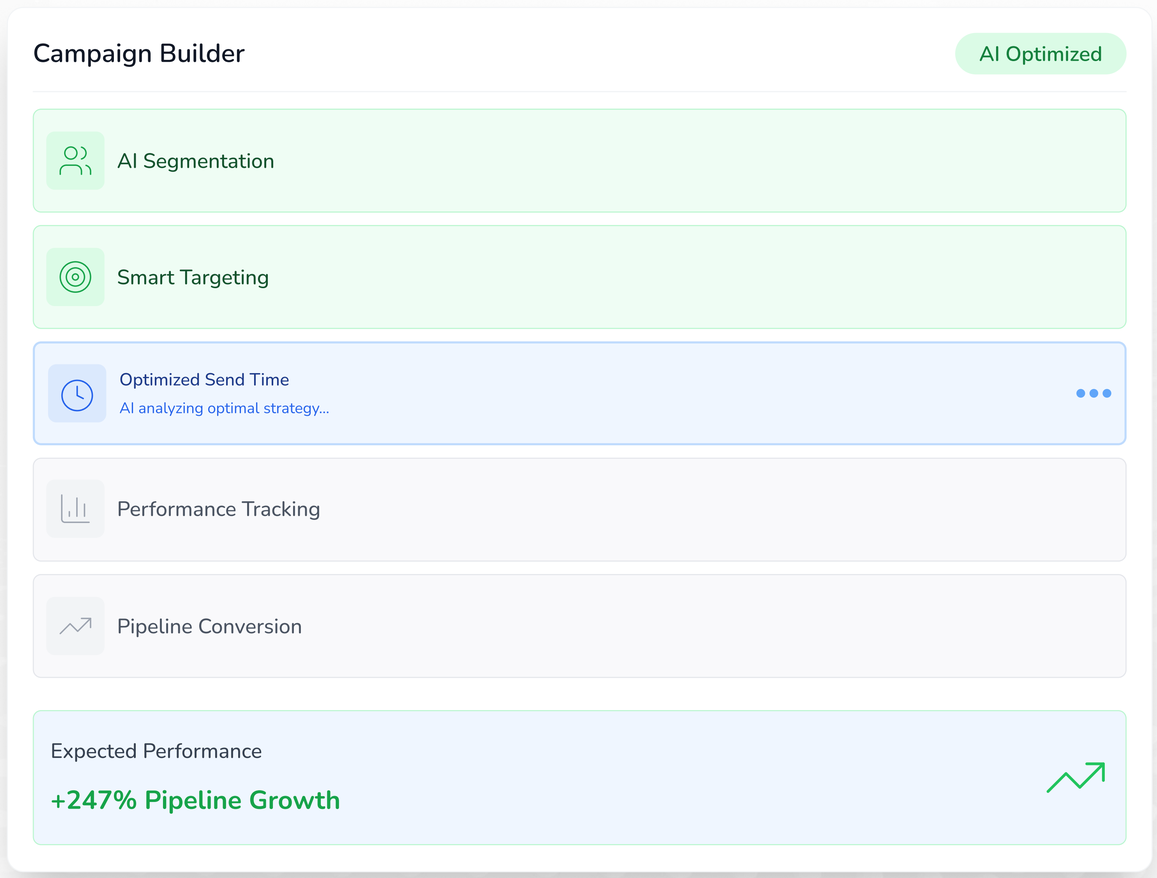
Mobile CRM Access



Features

08

Campaign Management



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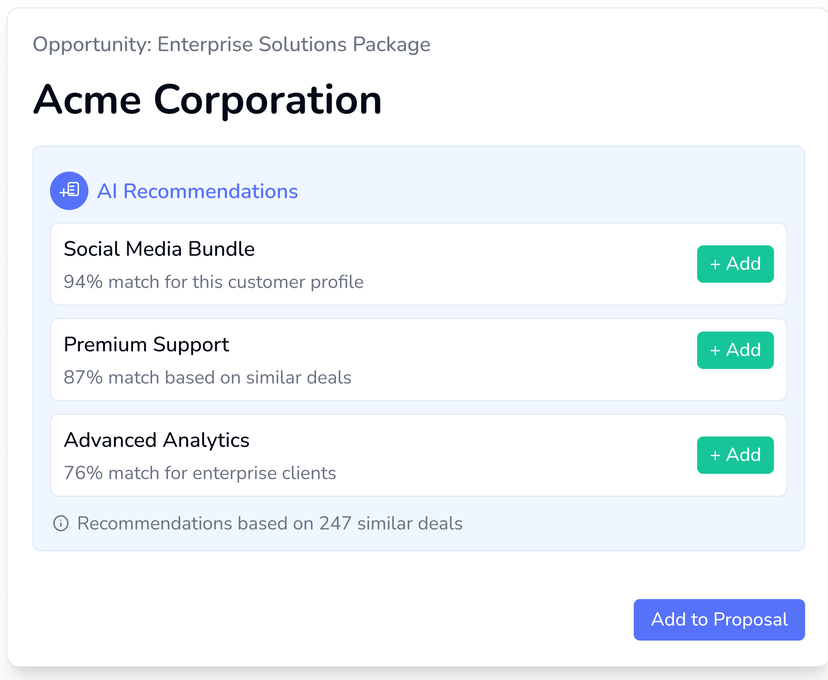
All-In-One CRM That Works The Way You Do

09

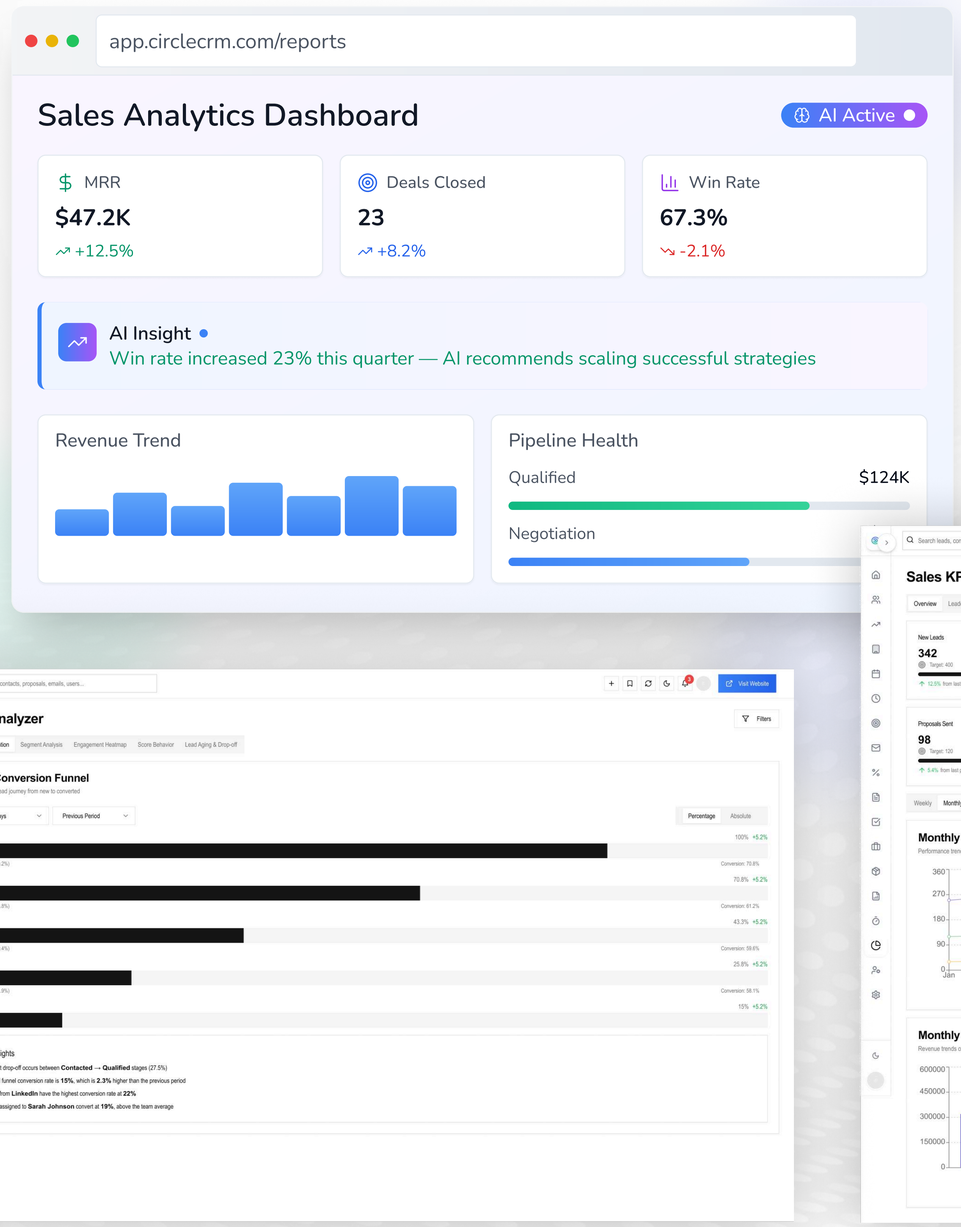
AI-Powered Up And Cross Sale Suggestions

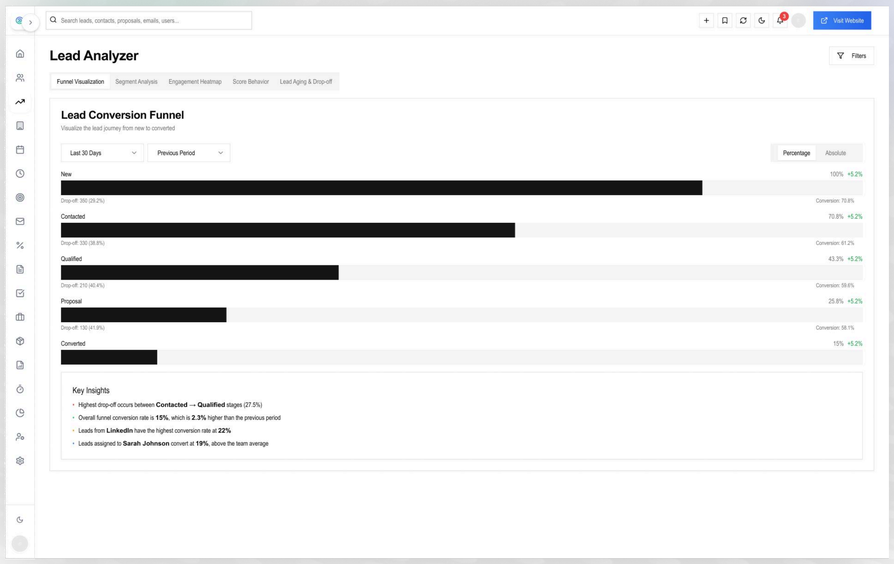


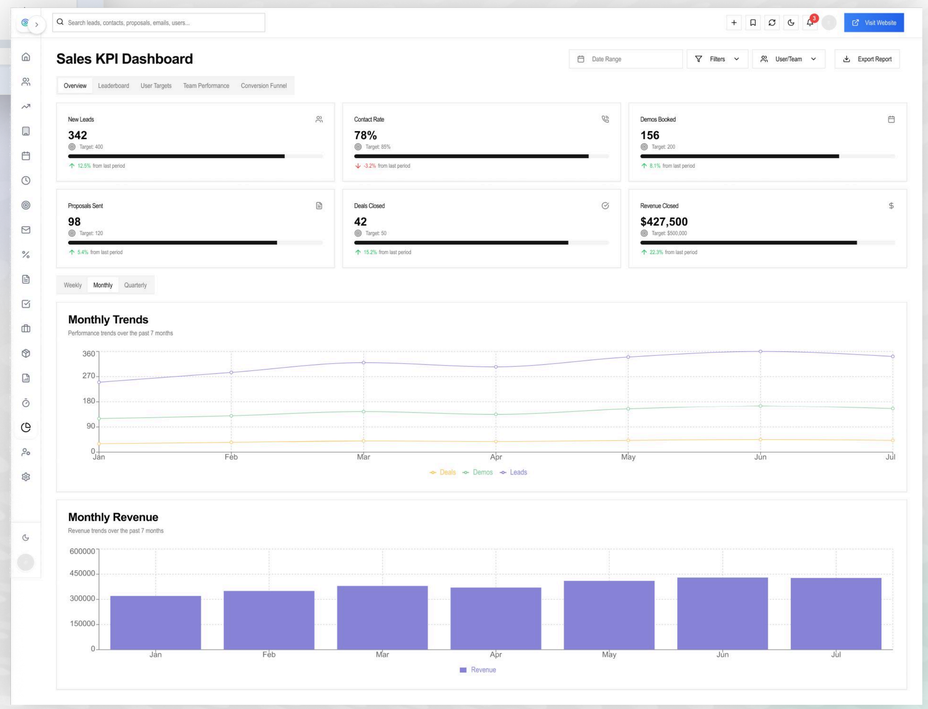
Features

10

Reporting & Dashboards







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Why Use Many Tools, When One Does It All?

Lead Sourcing Partners

Apollo.io

crunchbase

CSV XLS

Lusha

Clearbit

zoominfo

Industries We Serve

Health Care

Information Technology

Real-Estate

EDTech

Circle CRM

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....

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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

Circle CRM

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

Circle CRM

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.

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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.

Circle CRM

Enterprise-Grade Security & Integration

Highlights

01 End-To-End Encryption

02 Role-Based Access Controls

03 SSO + MFA Support

04 REST APIs

05 GDPR, HIPAA, CCPA Ready

06 Built-In Connectors (Outlook, Gmail, Slack, Zoom, QuickBooks)

Designed To Plug Into Your Ecosystem — Securely

Circle CRM

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

Circle CRM

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

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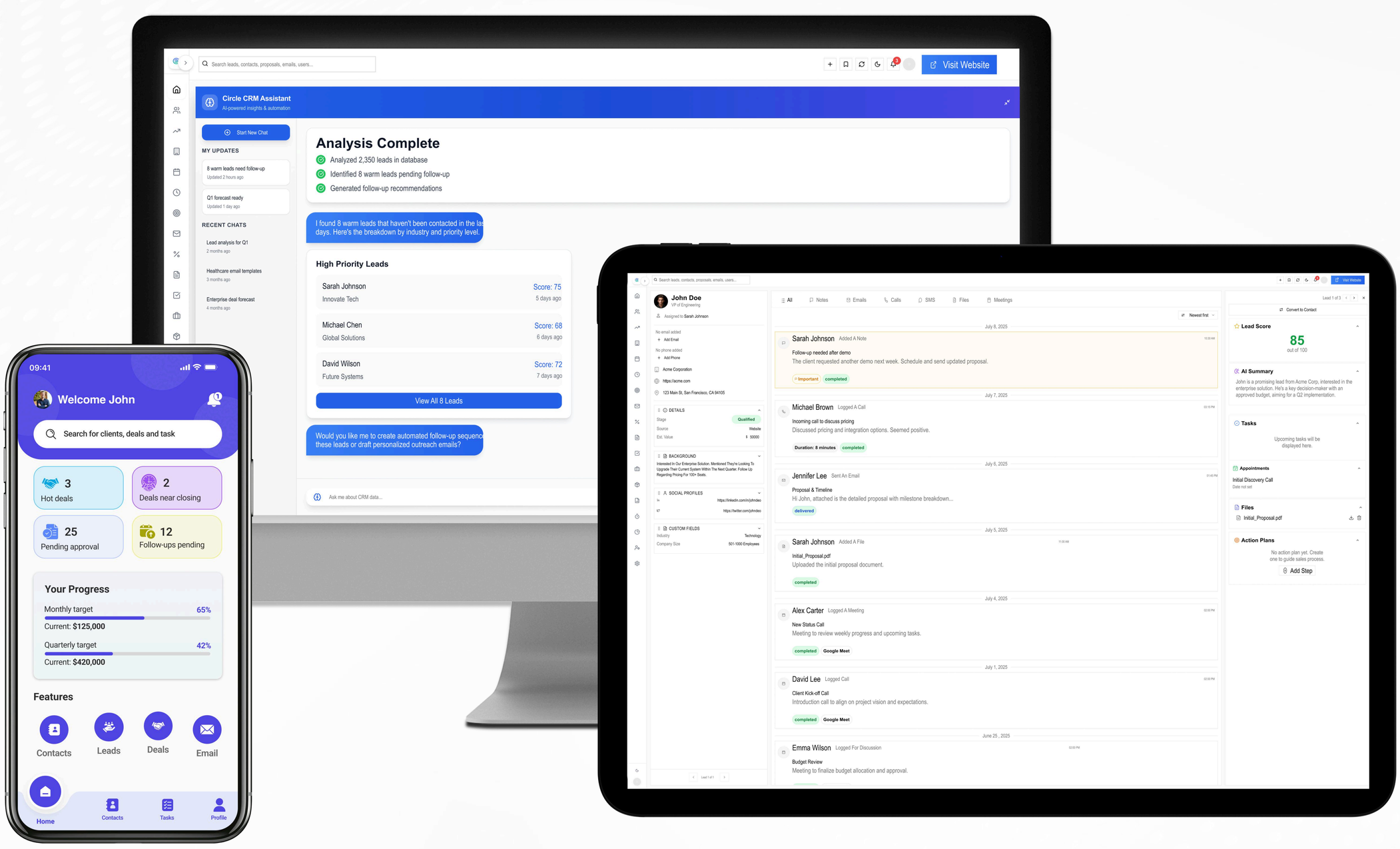
Ready To Scale With Circle CRM?



Book A Demo

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