

■ EXECUTIVE BRIEFING FOR SALES LEADERSHIP

The CRM Era Is Over. This Is the AI-Powered Revenue Platform.

CRMs record what happened. Sales Advisor makes it happen. An AI workforce that prospects, calls, books, analyzes, forecasts, and coaches inside one platform, so every rep sells with the leverage of an entire revenue team behind them.

100+

Capabilities Compared

10

Capability Categories

6Competitors
Benchmarked**140+**

Native Integrations

SALES ADVISOR / EXECUTIVE EDITION

One platform. The entire revenue engine.

A decisive operating system for teams that refuse to leave revenue work to a database.

We Did Not Build Another CRM. We Built Its Replacement.

The CRM industry made one promise for thirty years: buy our software and your team will sell more. Then it handed salespeople a database and made them do the work. Reps became data entry clerks. Managers became report readers. The tools recorded the past while the pipeline quietly slipped away.

We started Sales Advisor with a different question: what if the platform did the selling work itself? Not suggestions. Not dashboards. Actual work. Prospecting, calling, booking, following up, analyzing every conversation, and coaching every rep, done by an AI workforce that never sleeps and never forgets a follow-up.

And we priced it for the teams that need it most. Enterprise-grade intelligence has been locked behind six-figure contracts and twelve-tool stacks for too long. Sales Advisor puts the whole revenue engine in one platform, at a price a growing team can say yes to.

"A CRM tells you what happened last quarter. Your platform should be out there winning the next one."

One Platform, Not Twelve Tools

CRM, outreach, calling, meetings, content, and coaching in a single system.

AI That Works, Not Just Suggests

Agents execute the outreach, the calls, and the follow-up themselves.

Enterprise Power, Honest Price

The capability of a large-cap stack without the large-cap contract.

Every Rep Gets a Team of AI Analysts.

AI Agent Command Center

- 20 specialized AI agents dispatched in plain language
- Multi-agent orchestration with shared memory and clear agent architecture
- Digital twin setup: voice selection, personality and tone
- Knowledge base upload to train your agents
- Per-channel activation: voice, SMS, email
- Live event feed, agent health monitors, manual override
- Background workflow actions with trigger-action builder and logs
- Persona Selling Agent adapts outreach to prospect psychology

Outreach and Scheduling

- Branching email, LinkedIn, SMS, and voice campaigns with contact enrollment
- Visual flow builder with preflight checks and pre-launch simulation
- AI Rewrite on templates and A/B testing
- Smart send times by timezone and engagement history
- Scheduling across email, SMS, and WhatsApp with Google and Outlook availability
- Automatic calendar invitations, booking, and rescheduling
- Personalized newsletters and automated birthday emails to CRM contacts

Engagement Intelligence

- Hot lead tiers by buying intent: Burning, Hot, Warm, Engaged
- Live feed of email opens, link clicks, and document views
- Real-time hot lead engagement toasts
- AI-prioritized inbox that surfaces urgent replies
- Email Intelligence: insights mined from your connected inbox

Unified Messaging

- One inbox for email, SMS, and WhatsApp Business
- Internal team chat: DMs and group channels
- Typing indicators, read receipts, file attachments
- Rich text composer with CC/BCC and profile switching

Your Pipeline Works the Phones While Your Reps Close.

AI Voice Calling

- AI outbound calling campaigns that converse and book demos
- Voicemail drop mode for volume outreach
- Inbound AI Receptionist answers FAQs, qualifies, captures leads, books, and routes
- IVR menus, business hours, and after-hours voicemail with transcription
- Warm live transfer to reps with machine detection
- Campaigns can call in your rep's own cloned voice
- Runs on your own business number
- Voice assistant on every page: commands, wake word, spoken data readback

Native Video Meetings

- Built-in video meetings, no third-party tools
- Multi-party rooms with guest links, per-person invites, chat, and host controls
- Screen share and background blur
- Demo rooms and Deal Closer demo room
- Demo Personalization Agent: prospect-specific demo scripts and live demo environments in seconds
- Meeting notes with transcripts, follow-ups, live captions, and co-pilot cues

Conversation Intelligence

- Native and external Zoom, Teams, and Webex meeting ingestion
- Calls and meetings transcribed, summarized, and routed into Meeting Notes
- MEDDIC scoring, sentiment, talk-ratio, and stage analysis
- Objection, competitor, commitment, and buying-signal extraction
- Call metrics dashboard: connect rates, demos booked, win rates, and loss patterns
- Live captions and in-call co-pilot cue cards, objection handlers, and battlecards
- Automated follow-up recommendations and CRM activity context from every conversation

Coaching and Enablement

- Win rate by stage per rep against team benchmark
- Loss pattern detection per rep and segment
- Real-time AI buyer rehearsal with transcript, talk ratio, saved scorecards, and scoring
- Training Room with company-specific modules, lessons, quizzes, assignments, and graded roleplay
- Methodology-specific rehearsal scenarios and rubric-based voice grading
- Saved attempts, scoring history, and manager-ready coaching evidence
- Pre-call briefs and automated post-call follow-up with CRM updates
- AI chat coach with document upload
- Exportable PDF coaching reports

Know Your Number Before the Quarter Ends.

Dashboard

- Four drillable KPIs: total revenue, pipeline value, total leads, and active deals
- AI Daily Brief surfaces new and hot leads, closing-soon deals, calls, completed and overdue work, goal pacing, and weekly wins
- AI Plays ranks three strategy moves with priority, rationale, and expected outcome
- Action Stream opens records, calls or emails contacts, completes tasks, adds signals, and reorganizes action lanes with persistent daily completion state
- Revenue Pulse and Account Watchlist surface urgent work and at-risk accounts
- Live Activity Timeline searches and filters signals, outreach, calls, meetings, deals, documents, tasks, and AI actions
- Revenue Trend and Forecast charts support 3-, 6-, and 12-month views with expected revenue and confidence bounds
- Pipeline by Stage and Leads by Source charts open scoped record drill-downs
- Active Goals show status, period, current-versus-target progress, and pacing

CRM

- Searchable, filterable lead, customer, and multi-contact account directory
- CSV, business-card, and QR capture with field mapping, review, and export
- Categories, smart segmentation, dedupe, and guided List Builder
- Verified, estimated, and reviewable enrichment for email, phone, LinkedIn, and title
- Unified timeline of emails, calls, and meetings
- AI lead scoring 0-100 with Revenue DNA badges
- Agent Log plus call, email, and task creation on every record
- Contact-level engagement history and relationship context across every account

Pipeline

- Dual Kanban: Prospects (6 stages) and Clients (5 stages)
- Drag-and-drop deals between stages
- Stage-by-stage deal velocity
- AI revenue forecast panel
- Commercial lifecycle from opportunity and proposal through quote, invoice, and payment
- Product catalog, deal import, proposal creation, and quote management
- Signed, declined, approved, and paid commercial-status tracking
- Stakeholder move detection when decision-makers change jobs
- AI Account Manager on every client deal

Analytics, Reports, and Goals

- Revenue DNA winning patterns with AI playbook generation
- Loss analysis, deal velocity, conversion, revenue-by-source, and trend tracking
- Market Intelligence and localized insights from your own data
- Custom dashboards, saved views, widgets, templates, and generated reports
- Report scope by lead, deal, rep, team, email, call, and related activity
- Goals with AI targets and pacing: Ahead, On Track, Behind, At Risk
- AI-created tasks, urgent callback alerts, and smart categorization

Everything Your Revenue Team Ships, Generated in One Place.

Content and Documents

- AI-generated proposals, case studies, and ROI calculators
- Battlecards, discovery guides, and demo scripts
- Content Hub with create, edit, organize, and delete templates
- Editable AI Presentation Creator for branded decks from CRM data
- Sales decks, pricing guides, quotes, and invoicing
- Digital business card with QR code and VCard download

Teams and Administration

- Admin, manager, and rep roles with invites, join codes, and domain auto-join
- Seat lifecycle, per-member feature controls, and AI credit caps
- Team grouping with colors, logos, live presence, and cross-team visibility
- Team performance reports and one-click coaching
- Stripe subscription portal, seat reconciliation, tier limits, and usage reporting
- Projects: tasks, notes, and client sharing
- 11 persisted user languages, right-to-left support, and branded AI support with escalation

Social Studio

- Publish to LinkedIn, X, Facebook, Instagram, TikTok, and YouTube
- Multiple named accounts with per-channel credential workflow and connection status
- Rich AI-assisted post drafts, media uploads, and image generation
- Recording Studio for screen and camera clips with background blur and shareable links
- Timezone-aware calendar for drafts, scheduled posts, and published posts
- Per-channel previews and results, including publishing status
- Reddit Radar and Keyword Intelligence for live buying conversations and tracking

Getting Started and Platform

- AI Sales Assessment scores data, process, tooling, and capacity, then maps findings to platform fixes
- Guided onboarding wizard, interactive product tour
- Cost Calculator models current-stack spend, savings, and downloadable results
- Build Your Business turns scope, systems, AI, brand, and compliance inputs into a consultant-grade brief
- 140+ integrations across CRM, email, calendar, communications, data, documents, analytics, forms, and SSO
- Native Enrichment plus leading prospect, company, and place-data providers
- Native browser extension

From Signal to Signature. One Operating System.

Executive Strategy

- Daily Brief: risks, priorities, and next-best actions
- Today’s Strategy recommendations tied to live revenue, pipeline, and engagement data
- AI Chief Revenue Officer weekly review with executive priorities and risks
- Usage-grounded Value Reports for adoption, time saved, and ROI by feature
- Revenue DNA, market intelligence, loss analysis, and generated action playbooks
- Saved executive dashboards and generated reporting for teams, reps, deals, and leads

Intent and Lead Capture

- Signals: funding, hiring, news, executive moves, and government opportunities
- Visitor and engagement capture from opens, clicks, document views, and activity
- LinkedIn browser scan creates, enriches, and assigns CRM leads
- AI company snapshots with live web research and validated intent context
- Reddit Radar surfaces live buying conversations and turns qualified opportunities into leads
- Lead tiers, scoring, routing, and ownership controls for immediate follow-up

Revenue Operations

- Public signing lifecycle with invitations, reminders, signer statuses, and audit trail
- Proposals, quotes, invoices, product catalogs, approvals, and paid-status tracking
- Lead routing, ownership, assignment, and duplicate controls
- Bi-directional CRM sync with activity back-sync, sync health, and recovery status
- Cross-channel activity timeline, task automation, and reply monitoring for every lead
- Background workflows for new leads, won deals, inactivity, and overdue tasks

Growth and Customer Success

- Webinars: registration, live delivery, reminders, replay, and recap
- Post-sale projects: timeline, Gantt, workload, tasks, notes, and client sharing
- Autonomous Account Manager for renewals, stakeholder follow-up, and at-risk clients
- AI Scheduling Assistant negotiates across email, SMS, and WhatsApp
- Google and Outlook availability, automatic invitations, booking, and rescheduling
- Client-facing progress visibility for onboarding and success work

Built to Pass Your Security Review.

Sales Advisor deploys alongside your existing stack. Your credentials stay yours, your data stays isolated, and your CRM of record stays in sync.

Security

- AES-256-GCM encryption at rest
- TLS 1.3 in transit
- TOTP multi-factor authentication with recovery codes
- Enterprise SSO / SAML: Okta, Entra ID, Google Workspace
- Bcrypt password protection, session and IP security logging
- Single-session enforcement, rate limiting, secret redaction, and tenant data isolation
- Customer data is not used to train AI models
- Role-scoped data access and encrypted credential handling across integrations

Compliance and Audit

- GDPR, CCPA, PIPEDA, and CASL controls
- Role-based access control and least-privilege data visibility
- Full admin audit trail and governed team administration
- Configurable AI retention with data export and deletion lifecycle
- Controller/processor model with DPA and data-subject support
- Documented subprocessors, data-transfer posture, and customer data-governance controls

White-Label Branding

- Brand name, light/dark logos, favicon, colors, typography, and sizing
- Custom domains and subdomains with branded login and client-facing views
- Custom support contacts, demo link, chatbot identity, and legal copy
- Visibility controls for marketing, pricing, billing, PDFs, navigation, and headers
- Reseller workspace with multi-client and nested franchise views
- Approval workflow plus per-client and per-user switching

Your Credentials, Your Data

- Encrypted credential vault for telephony, email, CRM, calendar, and AI providers
- User, organization, and profile-scoped connections with primary-account selection
- OAuth scopes, expiry, refresh, sync health, and connection-error visibility
- Your keys and tokens remain under your control across multiple accounts
- Choose your AI provider: OpenAI, Google AI, Anthropic, or xAI
- Organization and per-user AI usage and spend caps with metered safeguards
- Provider-aware AI routing, connection recovery, and account-level usage control

Two AI Engines Can Now Run the Entire Platform.

OpenAI

FULL PLATFORM

- Runs all 20 AI sales agents and the Command Center
- Email, proposal, and content generation
- Sentiment analysis and lead scoring
- Live AI voice calling and campaigns
- Inbound AI Receptionist with call routing
- Call transcription and text-to-speech
- AI image generation for social posts
- Live meeting co-pilot during sales calls
- AI coaching chat and Rehearsal Room
- Workflow automations end to end

Google AI

FULL PLATFORM

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Prefer Anthropic or xAI? Know Exactly What You Get.

Anthropic

TEXT AI FEATURES

- Runs all 20 AI sales agents and the Command Center
- Email, proposal, and content generation
- Sentiment analysis and lead scoring
- AI coaching chat and document generation
- Social post copy and campaign writing
- Workflow automations end to end

Not available

Live AI voice calling and AI Receptionist · Call transcription and text-to-speech · AI image generation · Live meeting co-pilot

xAI

TEXT AI FEATURES

- Runs all 20 AI sales agents and the Command Center
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Not available

Live AI voice calling and AI Receptionist · Call transcription and text-to-speech · AI image generation · Live meeting co-pilot

Start Free. Scale as You Grow.

PLAN COMPARISON

CAD · BILLED PER SEAT, MONTHLY

Free

\$0 / seat / month

Get the CRM and start operating.

LIMITS

- Unlimited Leads & Contacts
- Unlimited Organization-Pipeline Deals

AI FEATURES

- 5 AI-Powered Sales Actions/User/Month

PLATFORM

- Manual CRM & Pipelines
- Dashboard & Pipeline Tracking
- Basic Analytics
- Email Integration
- View All Premium Workspaces

GET STARTED

Elite

\$24 / seat / month

Start seriously executing with AI.

LIMITS

- Unlimited Leads
- Unlimited Deals
- Unlimited AI Commands

AI FEATURES

- AI Sales Coach
- Voice Commands
- Call Analysis
- Meeting Notes
- Predictive Scoring
- Revenue DNA Matching
- Buyer Intent
- Inbound And Outbound Calling Agents
- Behavioral Rep Coaching
- 20-Agent Command Center
- Cross-Agent Memory
- AI Sales Content Hub

PLATFORM

- Dashboard
- Full CRM & Pipeline
- Conversation Intel
- Full Integrations
- Dual Pipeline (Prospects + Clients)
- Unified Inbox
- Internal Team Chat
- Real-Time Engagement Toasts

SUPPORT

- Priority Support

START FREE

Enterprise

RECOMMENDED

\$49 / seat / month

Unlock the full AI-first sales execution environment.

LIMITS

- Unlimited Leads
- Unlimited Deals
- Unlimited AI Commands

AI FEATURES

- AI Sales Coach
- Voice Commands
- Call Analysis
- Meeting Notes
- Predictive Scoring
- Revenue DNA Matching
- Buyer Intent
- Inbound And Outbound Calling Agents
- Behavioral Rep Coaching
- 20-Agent Command Center
- Cross-Agent Memory
- AI Sales Content Hub

PLATFORM

- Dashboard
- Full CRM & Pipeline
- Native Browser Extension
- White-Label Branding
- 11 Language Support
- SSO / SAML
- Unified Inbox
- Internal Team Chat
- Real-Time Engagement Toasts

SUPPORT

- Dedicated Success Manager
- Dedicated Support
- 99.9% Uptime SLA

START FREE