

Minsky™ CRM

AI-Enabled Enterprise CRM Platform

Overview

Minsky™ CRM is an enterprise-grade, AI-powered CRM platform engineered to unify sales, customer success, operations, forecasting, automation, and governance into a single intelligent ecosystem. Coverage spans the full sales lifecycle — from a lightweight Discovery Form that captures initial prospect interest, through Lead qualification, Opportunities, Quotes and Proposals, to closed-won and project delivery. Built on a modern tri-layer architecture, Minsky™ CRM delivers real-time intelligence, automation, and deep analytics designed for high-scale enterprise environments.

Built for the AI-first, data-sovereign, user-friendly, and cost-sensitive enterprise — offering complete flexibility, fewer restrictions, lower cost, and modern AI automation.

Platform Navigation & Modules

A single, unified workspace covering every stage of the sales lifecycle:

Dashboard	Discovery Form	Leads	Accounts	Opportunities	Quotes / Proposals	RFP Builder
Contacts	Vendors	Completed Projects	Calendar	Reports	Data Migration	Users

Every form in the platform — Discovery, Lead, Opportunity, Account, and beyond — can be tailored field-by-field through a no-code, drag-and-drop builder available to Client Admins, so the workspace adapts to each team's process without a vendor ticket.

AI Capabilities

AI is embedded natively across Minsky™ CRM — not a bolted-on add-on tier.

- **Ask Minsky™** — conversational AI assistant delivering real-time natural-language data queries and insights across accounts, pipeline, and reports
- **Predictive Forecasting** — AI-driven stage analytics, deal probability scoring, and pipeline rollups for more accurate revenue forecasts
- **Relationship Graphing** — AI-mapped account and contact networks that surface hidden influencers and warm paths into opportunities
- **AI-Powered Enrichment** — automatic data cleansing, deduplication, and enrichment of accounts and contacts from connected sources
- **Generative Notes & Summaries** — automated call notes, meeting summaries, and account recaps generated from activity data
- **Next-Best-Action & AI-Generated Proposals** — recommendations plus automated drafting of proposals, quotations, and RFP responses

AI in Action

Proposal & Quote Creation Turn any opportunity into a polished, branded proposal, quote, or RFP response in minutes — auto-populated from deal data and ready for e-signature.	Ask Minsky™ Ask in plain English — 'What's my Q3 pipeline by rep?' — and get instant data, reports, and summaries back in seconds.	AI-Drafted Intro Emails Personalized introduction, follow-up, and re-engagement emails generated from account and contact context — ready to review and send.
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User Journeys

- **Sales Reps** — discovery capture, lead processing, demos, opportunities, attainment dashboards
- **Sales Managers** — team-wide pipeline view, approvals queue, pipeline gaps, forecasts
- **Client Admin** — user management, data migration, and drag-and-drop form customization
- **Customer Success** — renewals, adoption, upsell actions, retention insights
- **Executives** — KPI dashboards, churn analysis, forecasting scenarios
- **Operations** — data imports, dedupe, compliance, system health

Security & Governance

Enterprise-grade security and governance are built into every layer of Minsky™ CRM.

- **Role-Based Access Control** — field-level permissions by role, team, and record
- **JWT Authentication** — with multi-factor authentication (MFA) support
- **Encryption** — end-to-end, at rest and in transit
- **Full Audit Logs** — every user and system action tracked
- **Data Residency Control** — via On-Prem and Sovereign Cloud deployment
- **Tenant Isolation** — strict row-level data separation between clients

Integration Ecosystem

Beyond the native HubSpot marketing connector, Minsky™CRM integrates with email (Gmail / Outlook), calendars, and Slack out of the box, plus open REST APIs and webhooks to connect ERP, billing, and support systems — extending automation across the full revenue stack.

Role-Based Access

- **Sales Reps & Managers** – Sales Performance Dashboard with pipeline value, active leads, and activities
- **Viewing: All Team** – managers see full team pipeline; reps see their own
- **Pending My Approval** – manager approval queue for deals and discounts
- **Client Admin** – everything above, plus org-wide Users management
- **Data Migration** – bulk import and migration tools
- **Form Builder** – drag-and-drop customization of any form platform-wide, with no code required

Client Admins customize any form — Discovery, Lead, Opportunity, Account, and more — in four steps:



Marketing Integration: HubSpot -> Minsky™CRM

HubSpot attracts and collects leads from marketing activity — website forms, landing pages, paid ads, email clicks, and live chat. A secure, native connector carries every new lead into Minsky™CRM in real time, so nobody re-types a record.

- Instant lead creation in Minsky™CRM, tagged Source = Web
- Auto-assignment to the right sales rep, with rep notification
- Follow-up tasks generated automatically so every lead is worked
- No-duplicates check – matched on email, existing leads are updated rather than duplicated
- Per-client secure token keeps each client's leads isolated to their own Minsky™CRM account
- Qualified leads convert directly into deals – account, contact, and opportunity

Why Enterprises Choose Minsky™CRM

1–100+ Users on one flexible platform — no per-seat lock-in	Weeks Typical time to go live, vs. months for legacy CRM	\$0 Extra AI, CPQ, RFP Builder & HubSpot integration — all included	100% Data control — on-prem or sovereign cloud options
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Minsky™CRM vs. Salesforce.com

Capability	Minsky™CRM	Salesforce.com
User Licensing	Flexible tiered pricing, scales from 1 to 100+ users	\$3K–\$6K per user/year; escalates at every tier
Conversational AI Assistant	Ask Minsky™ – included	Einstein Copilot – separate license
CPQ (Configure Price Quote)	Integrated, no extra license	Requires Salesforce CPQ add-on
Form / Page Customization	Drag-and-drop, no-code, self-service	Requires admin/dev configuration
AI-Generated Proposals / RFPs	Built-in RFP Builder	Not native – requires AppExchange
Marketing Lead Capture	Native HubSpot connector, real-time, included	Requires Marketing Cloud / Pardot add-on
Open Stack / No Lock-In	Open architecture, customer-controlled	Proprietary platform ecosystem
Deployment Model	Cloud, On-Prem, or Sovereign Cloud	Public multi-tenant cloud only
Data Residency / Sovereignty	Full control – on-prem & sovereign cloud options	Limited to Salesforce-hosted regions
Implementation Timeline	Typically live in weeks	Often 3–6+ months with an SI partner
Source Code Access	Available (Full Solution option)	Not available

Deployment Options: Subscription Multitenant Cloud | White-Label on Client Server | On-Prem Servers | Sovereign Cloud Servers | Full Solution with Source Code

See Minsky™CRM in Action

Schedule a live walkthrough and discover enterprise-grade AI CRM at a fraction of the total cost of ownership.

Info25@ailabsinc.com | www.ailabsinc.com