

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. Built on a modern tri-layer architecture, Minsky™ CRM delivers real-time intelligence, automation, and deep analytics designed for high-scale enterprise environments.

Minsky™ CRM is built for the **AI-first, data-sovereign, engineer-friendly, and cost-sensitive** enterprise. It offers complete flexibility, fewer restrictions, lower cost, and modern AI automation.

Modules and Functional Blocks

- Accounts & Contacts – Relationship mapping, activity history, enrichment
- Leads – AI scoring, dedupe, prioritization, conversion flows
- Opportunities – Pipeline management, forecasting, quotas
- Tasks & Activities – Calls, meetings, reminders, tracking
- Cases – SLA-based workflows, escalations
- Reporting – Dashboards, drill-downs, scheduled reports
- Workflow Automation – Triggers, routing, enrichment
- Admin Console – RBAC, roles, field-level settings, theme

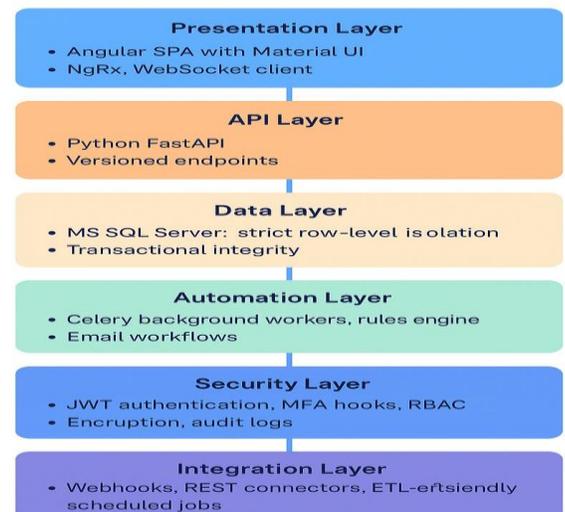
AI Capabilities (Optional)

- Predictive forecasting, relationship graphing, AI-powered enrichment, automated summarization, generative notes, and next-best-action recommendations.

User Journeys

- Sales Reps – Lead processing, demos, opportunities, attainment dashboards
- Sales Managers – Team performance, pipeline gaps, approvals, forecasts
- Customer Success – Renewals, adoption, upsell actions, retention insights
- Executives – KPI dashboards, churn analysis, forecasting scenarios
- Operations – Data imports, dedupe, compliance, system health

System Architecture Overview



Core Value Proposition

- Costs – Much lower Total cost of ownership compared to leading CRM Platforms
- Enhance Forecast Accuracy – Stage analytics, probability scoring, and rollups
- Increase Operational Efficiency – Bulk tools, dedupe, workflows, enrichment jobs
- Fully Customizable– open stack and can be integrated with internal systems
- Scale Seamlessly – Multi-tenant, customizable metadata, global-ready