



#1 INDIA'S BEST CRM SOFTWARE FOR MSME

Manage Clients, Leads, and
Projects All in 1 Place



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INTRODUCTION

CRM9 isn't just another CRM. It's built as an all-in-one CRM designed to help manage your leads, clients, projects, invoices, and team activity in one place—without the overwhelm. Because we were tired of messy spreadsheets, scattered tools, and the constant chaos of managing clients, leads, projects, and teams.

So we made CRM9 to organize everything you need in one place. CRM9 gives you clarity, control, and confidence in your daily operations.

We believe great businesses shouldn't slow down because of manual work, scattered data, and inefficient processes. That's why we built CRM9—to help you manage your clients, leads, proposals, projects, invoices, and team activity, all under one clean, intuitive platform.

- **WHO WE ARE**

We're a team of entrepreneurs, developers, workflow experts, and problem solvers who understand the challenges of managing a growing business. We've felt the frustration of wasted time, lost leads, and inefficient workflows.



- **WHAT MAKES CRM9 DIFFERENT?**

- **All-in-one, without the overwhelm:** From lead capture to invoices and team activity, manage your entire workflow in one place.
- **Built for real teams:** Whether you're a growing agency, a SaaS startup, or a consulting firm, CRM9 adapts to how you work.
- **Clean, intuitive design:** You don't need training to use CRM9. It just makes sense from day one.
- **Affordable, powerful, scalable:** Get enterprise-grade functionality without draining your budget.

• WHY WE BUILT CRM9

We've experienced the messy middle of growth:

- ✓ Chasing scattered leads.
- ✓ Forgetting follow-ups.
- ✓ Losing track of client communication.
- ✓ Manually sending invoices.
- ✓ Jumping between spreadsheets and WhatsApp to Manage projects.

• WHY CRM9?

Because you deserve a CRM that works for you, not the other way around.

CRM9 isn't just another tool to manage your business; it's your central hub for organizing leads, managing clients, tracking projects, collaborating with your team, and handling documents—all in one clean, intuitive platform that adapts to your workflow.

The screenshot displays the CRM9 dashboard. On the left is a sidebar with navigation icons for Dashboard, Leads, Clients, Events, To do, Tasks, Notes, Reports, Messages, Settings, Accounting, Prospects, and Sales. The top navigation bar includes a search icon, a plus icon, a globe icon, a clock icon with a red notification badge, a bell icon, an envelope icon, and a user profile icon for Akash Patel. The main content area is titled 'Dashboard for Leads' and features a 'Leads Overview' section with a donut chart. The chart shows the following data:

Category	Count
New	57
Qualified	51
Discussion	15
Proposal Sent	15
Lost	30
Different Category	7

Below the chart, it states 'Total leads: 175' and 'Converted to client: 1'. To the right of the chart are two summary cards: 'Events today' with a value of 0, and 'Reminder Today' with a value of 0 and 'Next reminder' with a value of 'No reminder'. At the bottom right of the dashboard, there is a large summary card showing '175 Total leads'.



Trusted by Beloved Customers

THE CHOICE OF TRUSTWORTHY BUSINESSES



What Our Clients Are Saying

SFW GYM

We really like the CRM9 Features and functions. It really helps to Track and Manage our leads and our gym Subscriptions easily. Best thing is the Software is at one time cost with cloud access.



Latteys Industries

The ability to centralize all customer data - from contact information and communication history to purchase records and support tickets - has created a single, comprehensive source of truth.



Chef Sanjeev Kapor

The impact on our sales and marketing teams has been particularly profound. With robust lead management, pipeline tracking, and automation features, our sales cycles have become more streamlined and efficient.



Features

01 **Lead Management**

Capture, track, and convert leads efficiently.

02 **Client Management**

Organize and maintain client records with ease.

03 **Task Management**

Assign and track tasks for your team seamlessly.

04 **Proposal Management**

Create and send professional proposals quickly.

05 **Project Management**

Keep projects on track from planning to delivery.

06 **Invoices & Estimates**

Simplify your billing and estimation process.

07 **Team Activity Log**

Monitor team progress and activities in real time.

08 **Subscription Management**

Manage client subscriptions effortlessly.

Features

09

Knowledgebase

Build internal or client-facing knowledge resources.

10

Internal Chats & Messages

Collaborate easily with your team.

11

Contract Management

Handle contract lifecycles in one place.

12

To-Do List

Organize daily tasks for better productivity.

13

Events Calendar

Keep track of meetings, deadlines, and launches.

14

Reminders

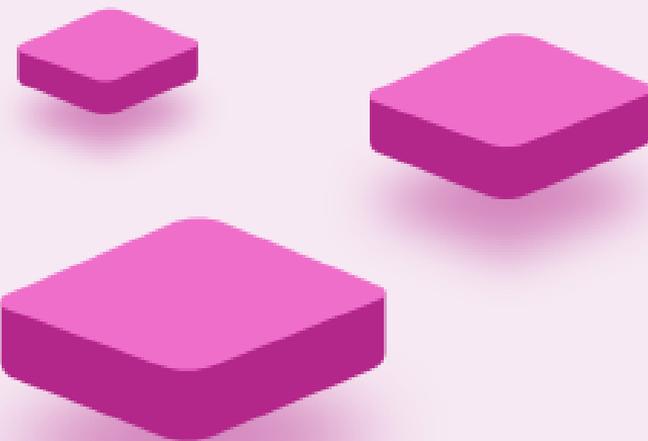
Automate reminders for important follow-ups.

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Custom Dashboard

Visualize key metrics your way.

Get in Touch with Us



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THANK YOU

