roundinfinity

AI-Powered Sales
Automation

Customize sales workflows & empower sales teams with AI automation to close more deals.

Our AI-powered sales automation platform supercharges sales efficiency by combining intelligent automation, custom workflows, and 360-degree customer insights. It streamlines lead management, opportunity tracking, and communications while enabling personalized engagement at every touchpoint.

Customizable workflows and advanced AI optimize cross-sell and up-sell strategies, driving higher revenue opportunities. The solution accelerates the sales cycle with automated processes, real-time dashboards, and precise forecasting, empowering data-driven decisions.

With seamless capabilities for order, payment, and compliance management, RoundInfinity equips sales teams to operate smarter, close deals faster, and maximize profitability with unparalleled scalability and flexibility.

Capabilities

Lead & Opportunity Management
Capture, verify, and convert leads with strategic guidance.

Accounts & Customer 360
Gain holistic customer views for personalized interactions.

Sales Forecast & Dashboards
Forecast, plan, and track sales performance seamlessly.

Partner Management
Boost revenue through tailored offers and partner collaboration.

Unified Communications
Streamline outreach and daily activities across channels.

Quotation Automation
Quickly access product data and generate precise quotes.

Orders & Invoice Automation
Efficiently manage orders and billing with full visibility.

Payment Links & eSign
Simplify payments and secure contract signings.

Self-Service Portal
Empower staff and customers with easy access to resources.

Custom Workflows & Tasks
Design no-code solutions for tailored sales processes.

KYC Automation
Streamline customer verification with AI & custom workflows.

Appointments & Reminders
Enable smooth bookings and automate follow-up alerts.

How it Works

1. Generate New Leads

- WhatsApp Campaigns
- Email Campaigns
- Voice Bot Campaigns
- SMS Campaigns
- Website Inquiries
- Website Live Chat
- Partner Leads – REST API Push
- Bulk Upload Leads From Excel

Auto-assign leads & close leads across departments using custom workflows

Auto-transcribe text from calls & track sentiment

AI

2. Convert To Accounts

Lead, Customer, Retailer, Supplier, Distributor, Employee, Consultant, Partner, Competitor, Press, Analyst, Other

- Activities
- Reminders
- Documents
- Contextual Collaboration
- Outbound Calls

- Opportunities
- Customer KYC — Auto-validate using face recognition, OCR — AI
- Inbound Calls — Auto-answer using voice bots, or auto-route to agents, call recordings & auto-transcribe — AI
- Contracts — eSign
- Quotes & Invoices — Auto-generate using templates
- WhatsApp. Email & Live Chat Cases — Auto-answer using messaging bots — AI

3. Track sales quotas, deal pipeline and generate a forecast

Business Impact

Enhanced Sales Efficiency
Automated processes reduce manual work & improves productivity.

Improved Collaboration
Personalized interactions and 360 insights boost customer satisfaction.

Faster Sales Cycle
Streamlined workflows and automation accelerate deal closures.

Increased Opportunities
Cross-sell, up-sell, and partner strategies optimize profitability.

Accurate Forecasting
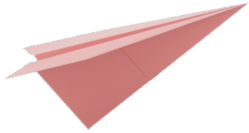Real-time dashboards and data-driven decision-making.

About Round Infinity

150+ Brands Across Industries

Offices In USA & India

5+ Countries Served

Getting Started

Request trial access at
https://www.roundinfinity.com/getstarted.html

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