

THE AI-NATIVE COMMUNICATION CRM

The enterprise CRM that runs the conversation, not just the customer record.

Calls, email, WhatsApp, meetings, AI and automation — unified in one multi-tenant platform. Built India-first for the way modern revenue teams actually sell.

VISION

Most CRMs manage records.

We manage conversations.

Every deal is really a sequence of conversations across channels. The record is just the residue.

Insta AI 365 puts the conversation at the centre — and lets AI keep the record perfect on its own.



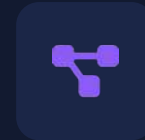
Conversation-centric

Calls, email, WhatsApp, SMS & meetings on one timeline per customer.



AI does the busywork

Transcribe, summarize, draft replies and update the CRM automatically.



Automation-native

Visual workflows turn every signal into the next best action.

THE PROBLEM

Teams bought CRMs to sell more. Instead they feed software.



28%

of a rep's week is spent actually selling — the rest is admin, data entry & tool-switching.

Salesforce State of Sales · Forrester



40–70%

of CRM projects fail or never reach real adoption after the money is spent.

Nucleus · industry reporting



~8 tools

the average rep juggles to close a single deal — context scattered everywhere.

Forrester activity study



2%

of sellers actually trust the accuracy of the data inside their CRM.

Salesforce State of Sales

The root cause isn't the rep. It's the model.

Legacy CRMs were designed for management reporting, so the seller becomes an unpaid data clerk. Conversations live in other apps, records decay, forecasts drift, and every disconnected tool adds another manual hop. Enablement and training can't fix a structural problem.



Three shifts just collided — for the first time the answer is buildable.



AI crossed the usefulness line

LLMs can now transcribe calls, summarize threads, draft replies and auto-populate CRM fields reliably — turning 'data entry' from a rep chore into a background job.

AI adoption in CRM projected +97% (2025–2030)



Buyers moved to messaging

Sales now happens over WhatsApp, SMS and calls — not just email. Legacy CRMs bolt these on as paid add-ons; buyers want them native and unified.

WhatsApp-first selling is the default in India & emerging markets



India's SaaS + digital wave

GST, UPI and Digital India created millions of formalizing SMBs and mid-market firms that global CRMs price out and don't localize for.

India CRM market growing ~18–19% CAGR to 2030

Sources: McKinsey; Salesforce State of Sales; Grand View Research (India CRM).

A large, fast-growing category — with an under-served wedge we can own.

TAM

Global CRM software

\$73B → \$163B by 2030

14.6% CAGR (Grand View). Broader CRM-plus-services scope reaches \$321B by 2034 (Fortune Business Insights).

SAM

AI + SaaS CRM for SMB & mid-market

\$55B → \$140B by 2030

SaaS CRM at 20.5% CAGR (Mordor); AI-in-CRM the fastest sub-segment. APAC growing ~24% — the fastest region.

SOM

India-first, comms-led beachhead

~\$2.9B → \$6.7B by 2030

India CRM at 18.7% CAGR (Grand View) inside a \$37B India SaaS market — under-served by global incumbents.

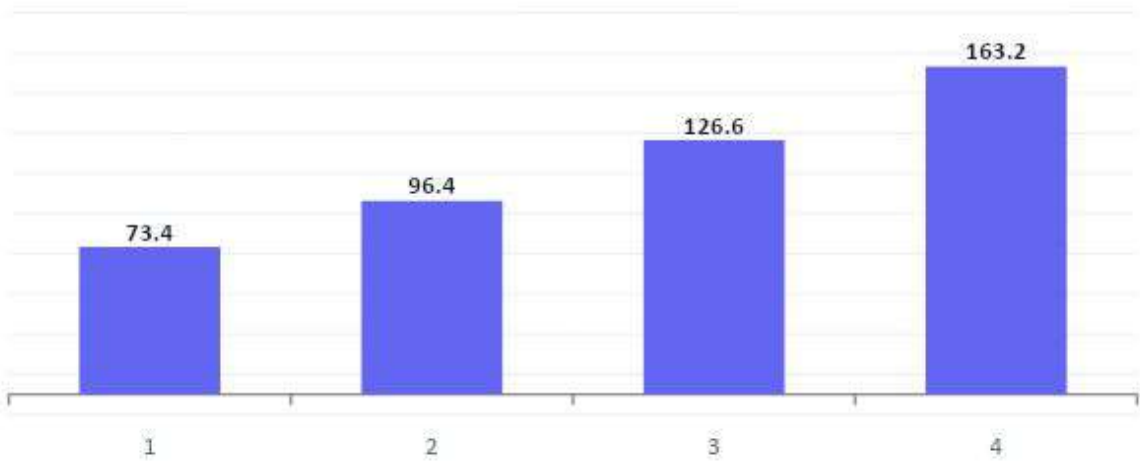


Sources: Grand View Research; Fortune Business Insights; Mordor Intelligence; Market.us (AI-in-CRM). Figures are analyst ranges, not blended.

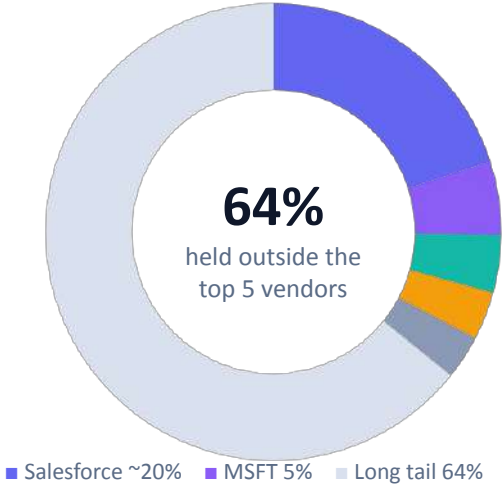
MARKET STATISTICS

The category is compounding — and tilting toward AI and APAC.

Global CRM software market (\$B)



Vendor share — a long tail of opportunity



~28% CAGR

AI-in-CRM — the fastest-growing slice of the market



~24% CAGR

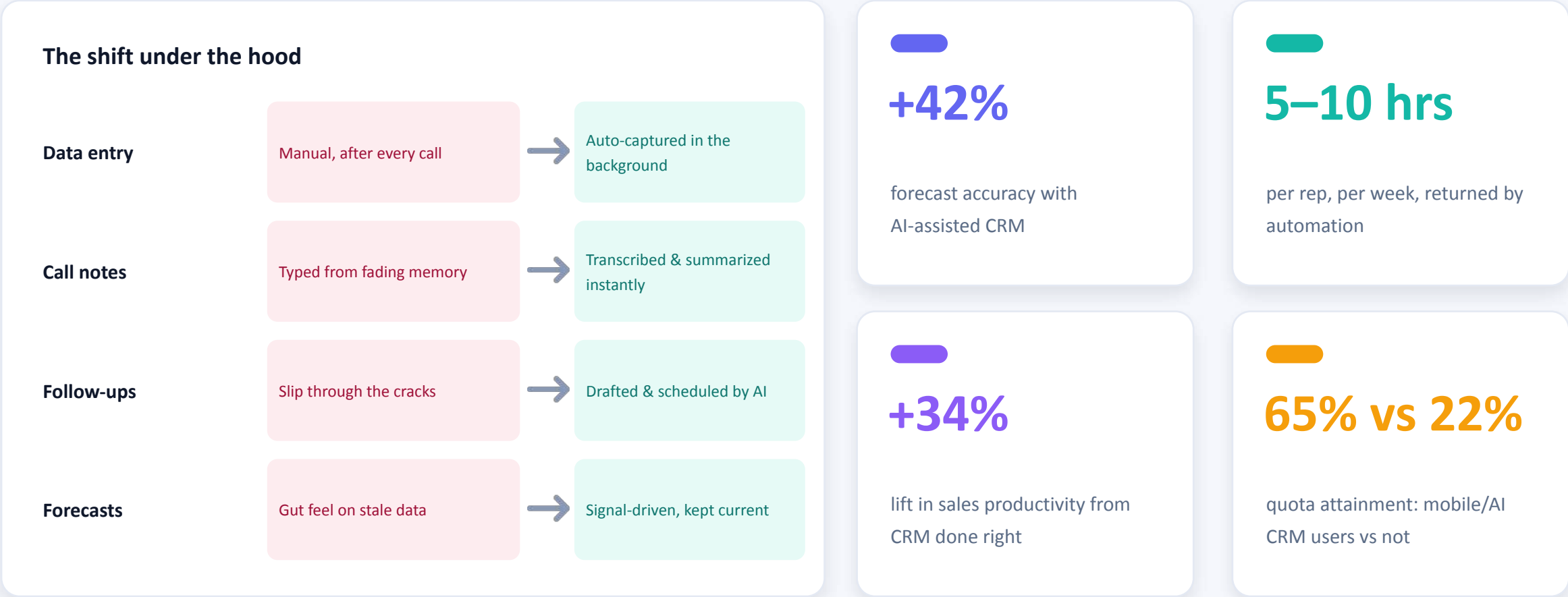
APAC SaaS-CRM growth, the fastest region worldwide



83%

more likely to beat sales goals when AI is used inside the CRM

AI flips the CRM from a cost of selling into a source of it.



PRODUCT OVERVIEW

One platform where 8 tools used to be.

Insta AI 365 replaces the CRM, the call recorder, the WhatsApp tool, the email sequencer, the quoting tool, the workflow builder and the BI dashboard — with a single, AI-native, multi-tenant system.



Leads & Contacts



Deals & Pipelines



Communication Hub



Workflow Automation



AI Copilot & Calls



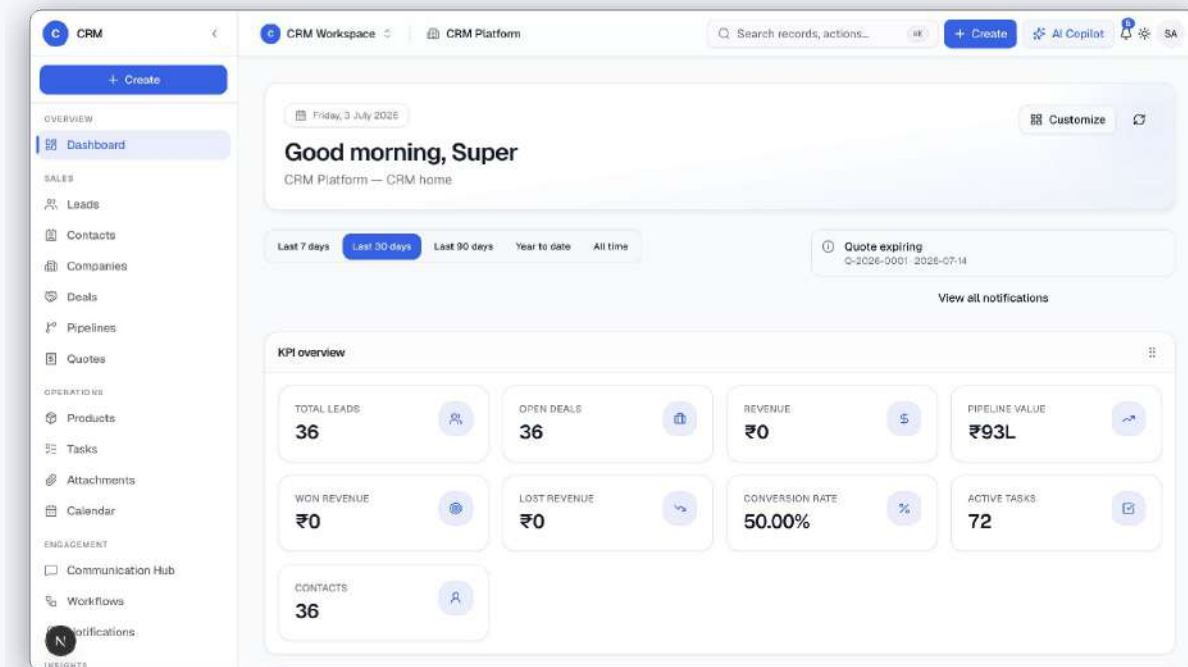
Quotes · GST · INR



Reports & Analytics



Custom Fields & Forms



Live product — the Insta AI 365 executive home

Enterprise-grade by design: multi-tenant, API-first, AI-ready.



Multi-tenant SaaS core

Isolated workspaces, per-tenant plans, subscriptions & billing from one control plane.



API-first services

Every module exposed via REST; webhooks and native forms push data straight in.



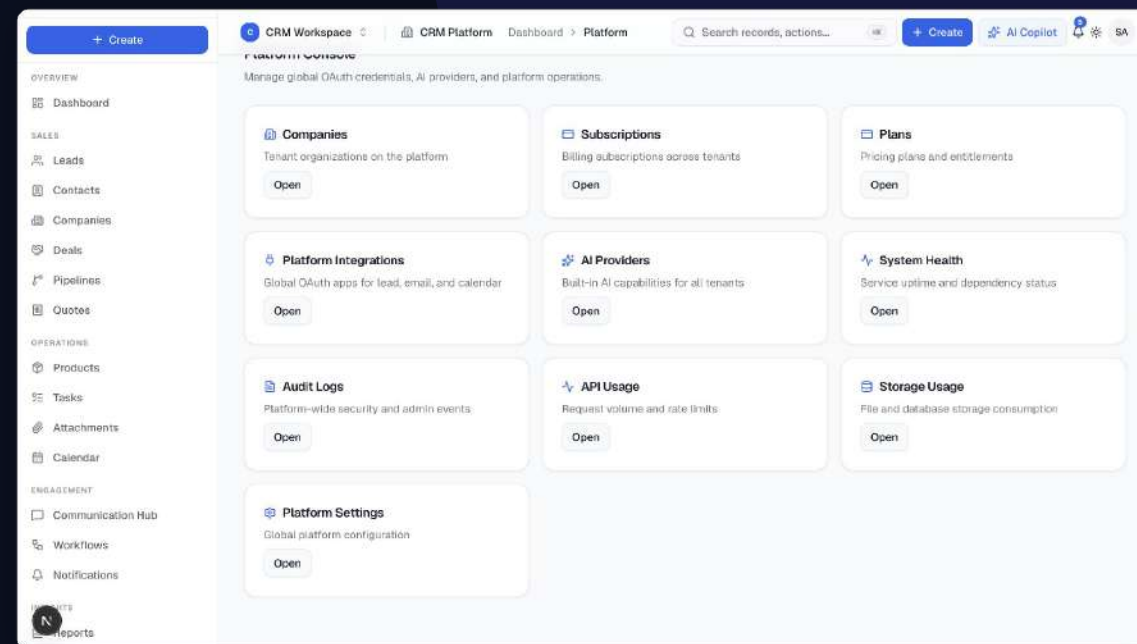
Roles, permissions & audit

Granular RBAC, GST/tax config, custom fields, audit logs and platform-wide security.



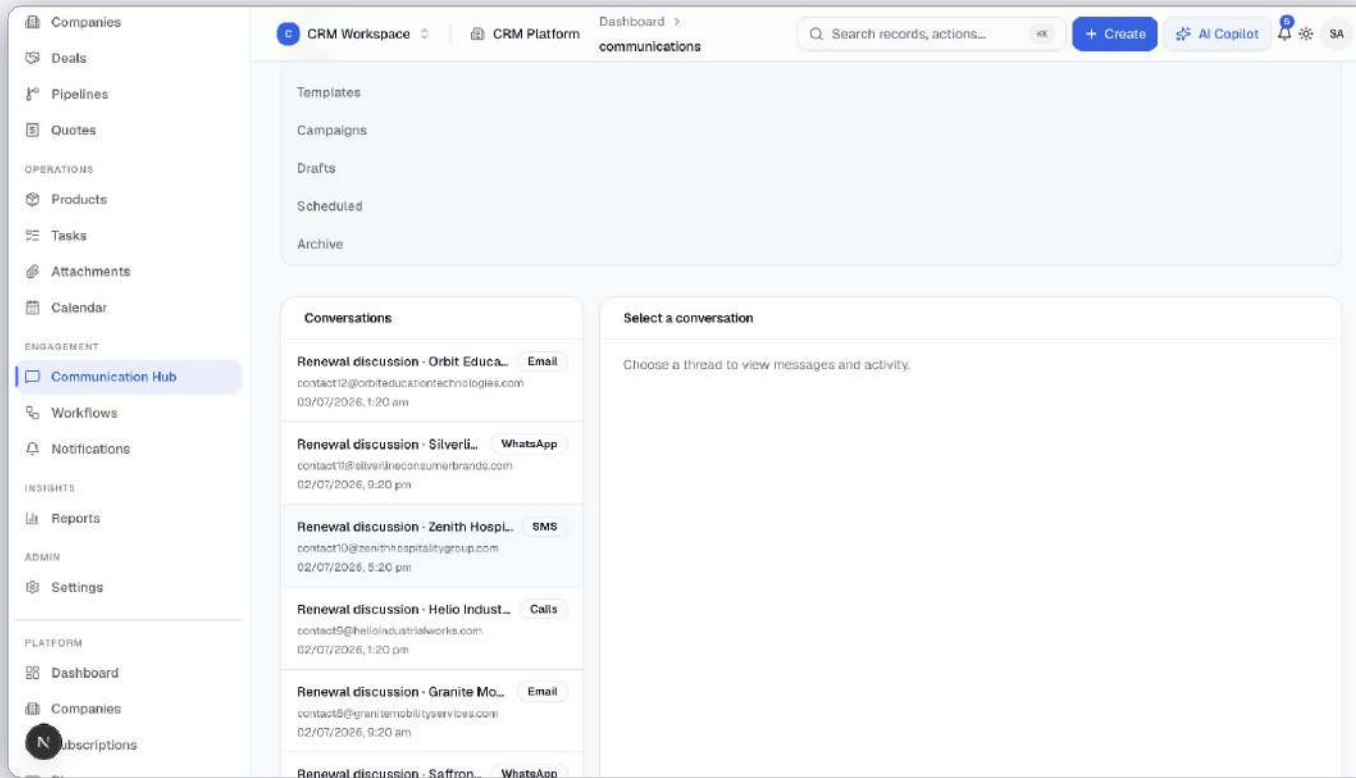
Pluggable AI providers

Built-in AI capabilities for all tenants, with provider-agnostic model routing.



Platform Console — tenants, plans, AI providers, health & usage

Every conversation, every channel — on one customer timeline.

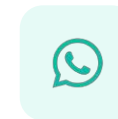


One inbox: Email · WhatsApp · SMS · Calls threaded per contact



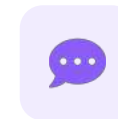
Email

Templates, campaigns, scheduling & drafts.



WhatsApp

Provider-agnostic Business Cloud messaging.



SMS

Transactional & conversational, logged automatically.



Calls

Recorded, transcribed & summarized by AI.

WORKFLOW AUTOMATION

Turn every signal into the next best action — visually.

A visual automation engine for triggers, conditions, delays and actions — the same lever Salesforce charges enterprise money for, native to every tenant.

Trigger
New lead, stage change, inbound message, SLA breach

Condition
Branch on value, owner, source, score or channel

Delay
Wait, throttle and time-box every step

Action
Assign, notify, create task, draft & send message

3

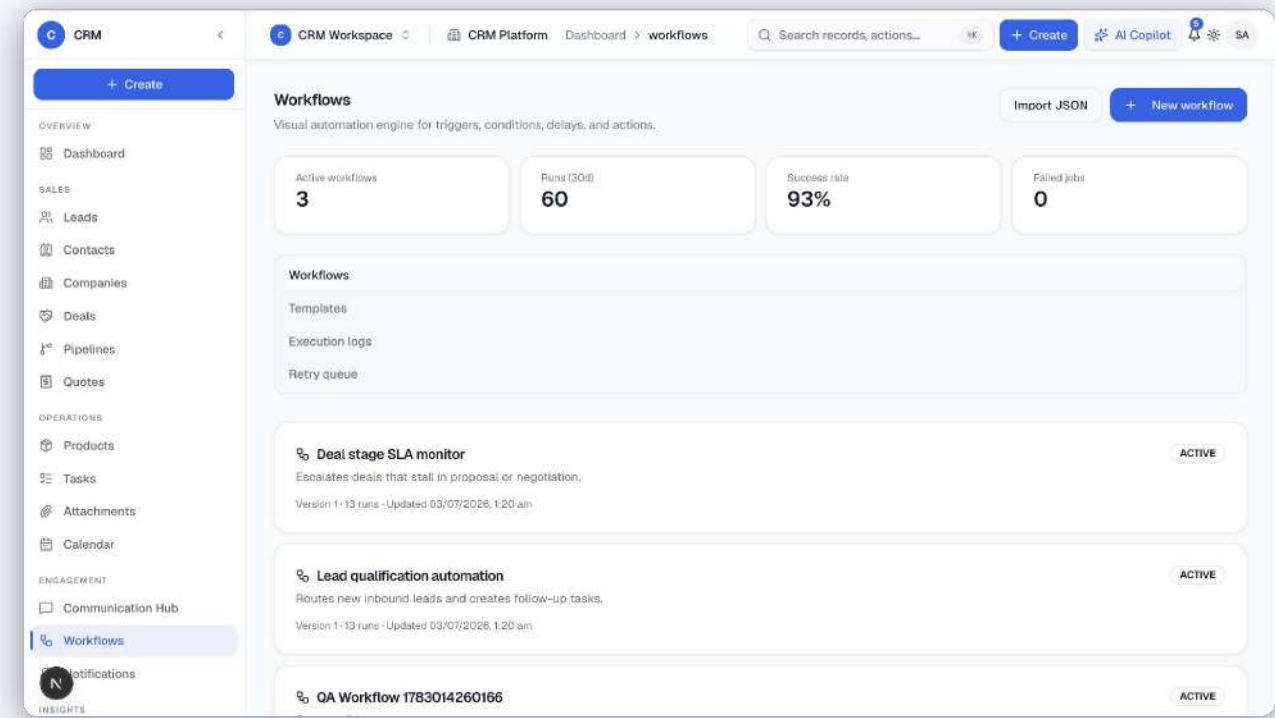
Active workflows

60

Runs / 30 days

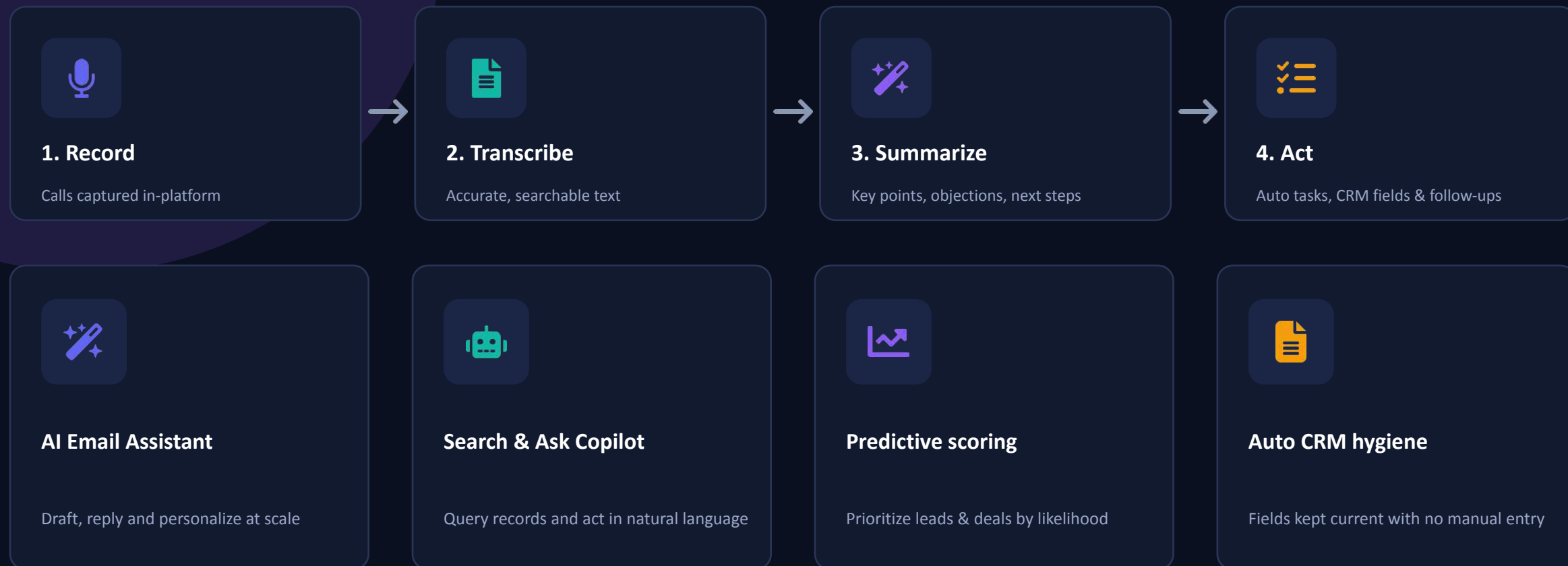
93%

Success rate

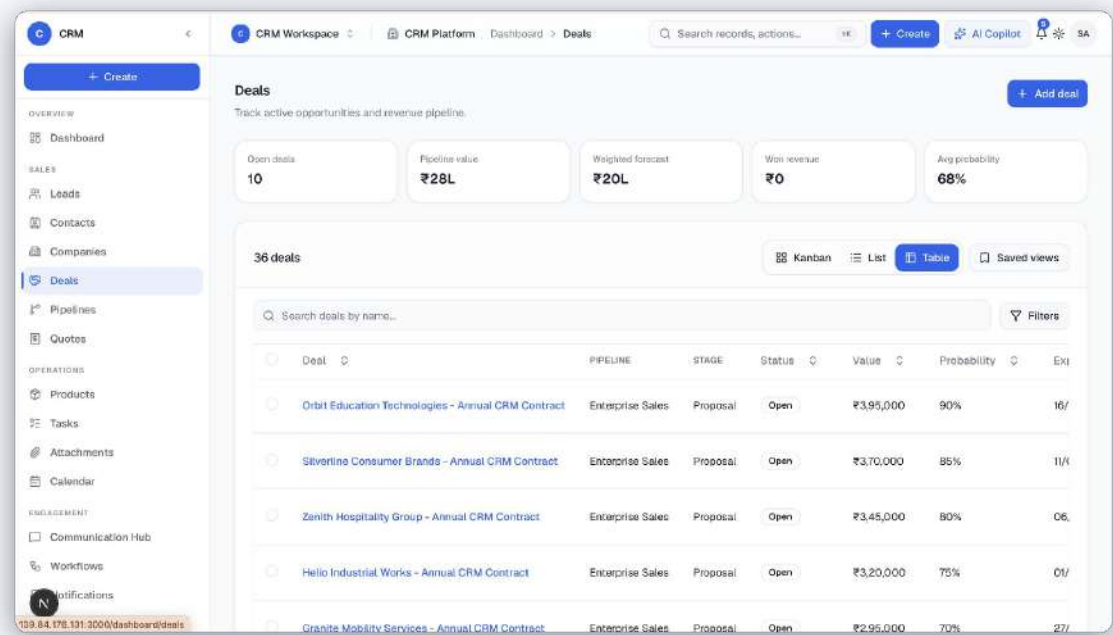


Live workflows: 93% success rate, zero failed jobs

An Insta Ai copilot wired into every call, thread and record.



The full system of record — depth investors expect, shipping today.



Deals — pipeline, weighted forecast, probability & stages (live product)



Leads



Contacts



Companies



Deals & Pipelines



Quotes (GST/INR)



Products



Tasks



Calendar



Attachments

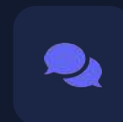
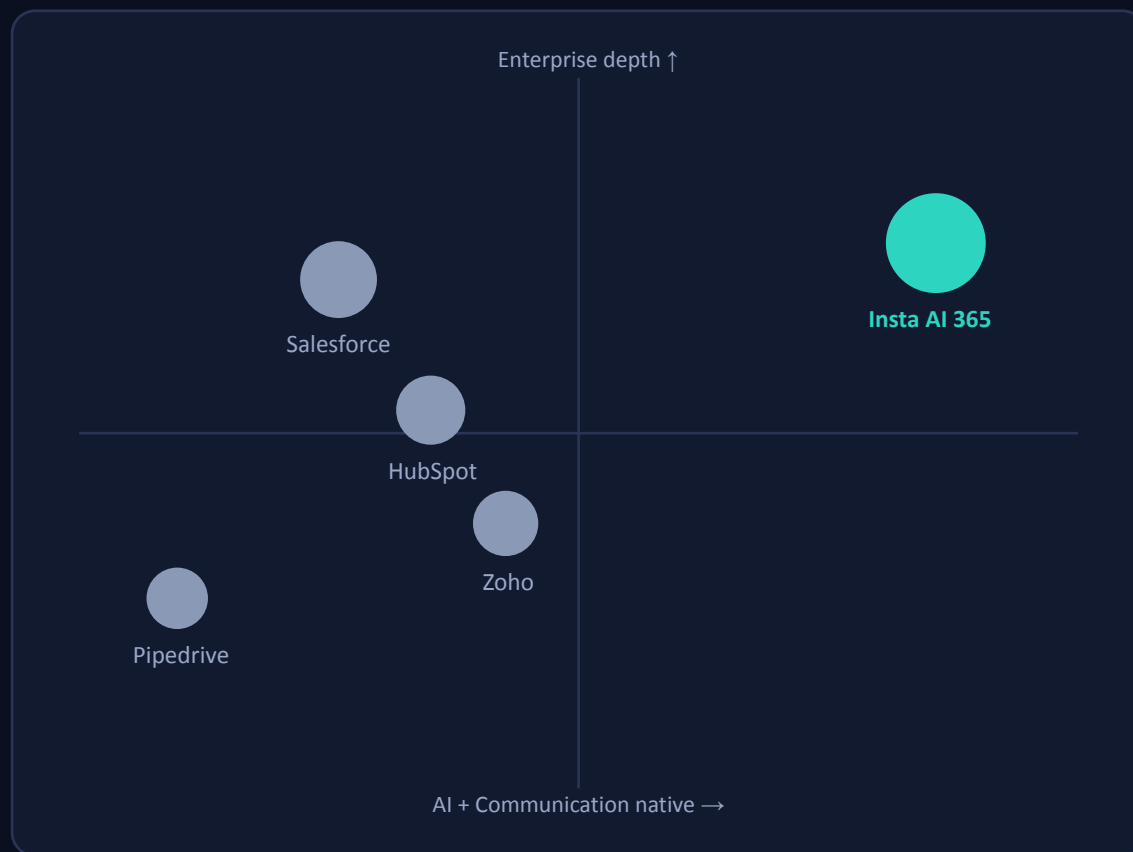


Reports & Analytics

Everyone does CRM. Almost no one does the whole conversation, India-native.

	Insta AI 365	Salesforce	HubSpot	Zoho	Freshsales	Pipedrive
Unified comms in-CRM (Email·WhatsApp·SMS·Calls)	●	●	●	●	●	○
Built-in call intelligence + AI copilot	●	●	●	●	●	○
Visual workflow automation (all tiers)	●	●	●	●	●	●
India-native: INR · GST · WhatsApp-first	●	○	○	●	●	○
Multi-tenant · API-first platform	●	●	●	●	●	●
Time-to-value	Days	Months	Weeks	Weeks	Weeks	Days
Mid-market price	\$	\$\$\$\$	\$\$\$	\$	\$\$	\$

Our wedge: the conversation layer legacy CRMs can't retrofit.



Communication-first

The customer timeline — not the form — is the primary object.



AI that closes the loop

From call to summary to updated record to next action, automatically.



India-native

INR, GST, WhatsApp-first and priced for the mid-market.



Provider-agnostic

Bring your own WhatsApp, telephony, email and AI providers.

Not a prototype. A shipping platform with real data across every module.

Leads
Manage and qualify your sales pipeline

36 leads

Name	Company	Email	Status	Priority
Orin Education Technologies Opportunity	Orin Education Technologies	stainholder@orineducationtechnologies.com	Follow up	14
Skatline Consumer Brands Opportunity	Skatline Consumer Brands	stainholder@skatlineconsumerbrands.com	Qualified	14
Zerth Hospitality Group Opportunity	Zerth Hospitality Group	stainholder@zerthhospitalitygroup.com	Contacted	14
Helle Industrial Works Opportunity	Helle Industrial Works	stainholder@helleindustrialworks.com	New	14
Graute Mobility Services Opportunity	Graute Mobility Services	stainholder@graute-mobilityservices.com	Follow up	14
Saffron Financial Advisory Opportunity	Saffron Financial Advisory	stainholder@saffronfinancialadvisory.com	Qualified	14

Leads

Quotes
Create, send, and track GST-ready sales quotes in bulk

7 quotes

Quote #	Status	Tick	XMRMS	Closed
Q-2025-0010	SENT			03/07/2025
Q-2025-0011	SENT			03/07/2025
Q-2025-0012	SENT			03/07/2025
Q-2025-0013	SENT			03/07/2025
Q-2025-0014	SENT			03/07/2025
Q-2025-0015	SENT			03/07/2025
Q-2025-0016	SENT			03/07/2025

Quotes · GST-ready

Tasks
Track your work across deals with lists, boards, and calendar views

72 tasks

Task	Status	Assigned To	Status	Priority
Follow-up with Skatline Consumer Brands	Skatline Consumer Brands - Annual CRM Contract	Ryan Kapoor	OPEN	HIGH
Follow-up with Skatline Consumer Brands	Skatline Consumer Brands - Annual CRM Contract	Ryan Kapoor	OPEN	HIGH
Follow-up with Skatline Consumer Brands	Skatline Consumer Brands - Annual CRM Contract	Ryan Kapoor	OPEN	HIGH
Follow-up with Skatline Consumer Brands	Skatline Consumer Brands - Annual CRM Contract	Ryan Kapoor	OPEN	HIGH
Follow-up with Skatline Consumer Brands	Skatline Consumer Brands - Annual CRM Contract	Ryan Kapoor	OPEN	HIGH
Follow-up with Skatline Consumer Brands	Skatline Consumer Brands - Annual CRM Contract	Ryan Kapoor	OPEN	HIGH
Follow-up with Skatline Consumer Brands	Skatline Consumer Brands - Annual CRM Contract	Ryan Kapoor	OPEN	HIGH

Tasks

Contacts
Manage people linked to your companies and leads

36 contacts

Name	Email	Phone	Title	Company
Dev Sharma	contact@orineducationtechnologies.com	+91-9700008547	Operations Director	Orin Education Technologies
Harish	contact@skatlineconsumerbrands.com	+91-9700007770	Procurement Lead	Skatline Consumer Brands
Arjun Gupta	contact@zerthhospitalitygroup.com	+91-9700006963	Finance Head	Zerth Hospitality Group
Mia Patel	contact@helleindustrialworks.com	+91-9700006266	VP Sales	Helle Industrial Works
Katrin Patel	contact@graute-mobilityservices.com	+91-9700005439	Operations Director	Graute Mobility Services
Aanya Singh	contact@saffronfinancialadvisory.com	+91-9700004862	Procurement Lead	Saffron Financial Advisory

Contacts

Calendar

Search events...

Mon	Tue	Wed	Thu	Fri	Sat	Sun
Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands
Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands
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Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands	Follow-up with Skatline Consumer Brands

Calendar

Integrations
Connect third-party services, communication channels, and AI tools for your workflow. Each integration is self-service — open Config to connect your accounts.

Search integrations...

Integration	Status	Connect
Google Ads	DISCONNECTED	Connect
LinkedIn	DISCONNECTED	Connect
Meta Lead	DISCONNECTED	Connect
HubSpot	DISCONNECTED	Connect
Mailchimp	DISCONNECTED	Connect
Slack	DISCONNECTED	Connect
Zoom	DISCONNECTED	Connect
Twilio	DISCONNECTED	Connect
Stripe	DISCONNECTED	Connect
Shopify	DISCONNECTED	Connect
WooCommerce	DISCONNECTED	Connect
WordPress	DISCONNECTED	Connect
Magento	DISCONNECTED	Connect
Drupal	DISCONNECTED	Connect
Joomla	DISCONNECTED	Connect
OpenCart	DISCONNECTED	Connect
PrestaShop	DISCONNECTED	Connect
Magento 2	DISCONNECTED	Connect
Magento 1	DISCONNECTED	Connect
Magento 2.3	DISCONNECTED	Connect
Magento 2.4	DISCONNECTED	Connect
Magento 2.5	DISCONNECTED	Connect
Magento 2.6	DISCONNECTED	Connect
Magento 2.7	DISCONNECTED	Connect
Magento 2.8	DISCONNECTED	Connect
Magento 2.9	DISCONNECTED	Connect
Magento 3.0	DISCONNECTED	Connect
Magento 3.1	DISCONNECTED	Connect
Magento 3.2	DISCONNECTED	Connect
Magento 3.3	DISCONNECTED	Connect
Magento 3.4	DISCONNECTED	Connect
Magento 3.5	DISCONNECTED	Connect
Magento 3.6	DISCONNECTED	Connect
Magento 3.7	DISCONNECTED	Connect
Magento 3.8	DISCONNECTED	Connect
Magento 3.9	DISCONNECTED	Connect
Magento 4.0	DISCONNECTED	Connect

Integrations

Per-seat SaaS, expanded by usage, add-ons and a future marketplace.

Starter

₹ / seat / mo

Core CRM, pipelines, tasks & basic comms for small teams.

✓

Leads · Deals · Tasks

✓

Email + templates

✓

Standard reports

POPULAR

Growth

₹₹ / seat / mo

The comms + AI engine for scaling revenue teams.

✓

WhatsApp · SMS · Calls

✓

AI copilot + call intelligence

✓

Visual workflows

Enterprise

Custom

Governance, scale & control for larger orgs.

✓

RBAC · audit · SSO

✓

Custom fields & API

✓

Dedicated success

Revenue architecture

Subscription

Predictable per-seat ARR across three tiers

Usage add-ons

Metered AI minutes, messages & enrichment

Enterprise

Security, SSO, volume & white-label

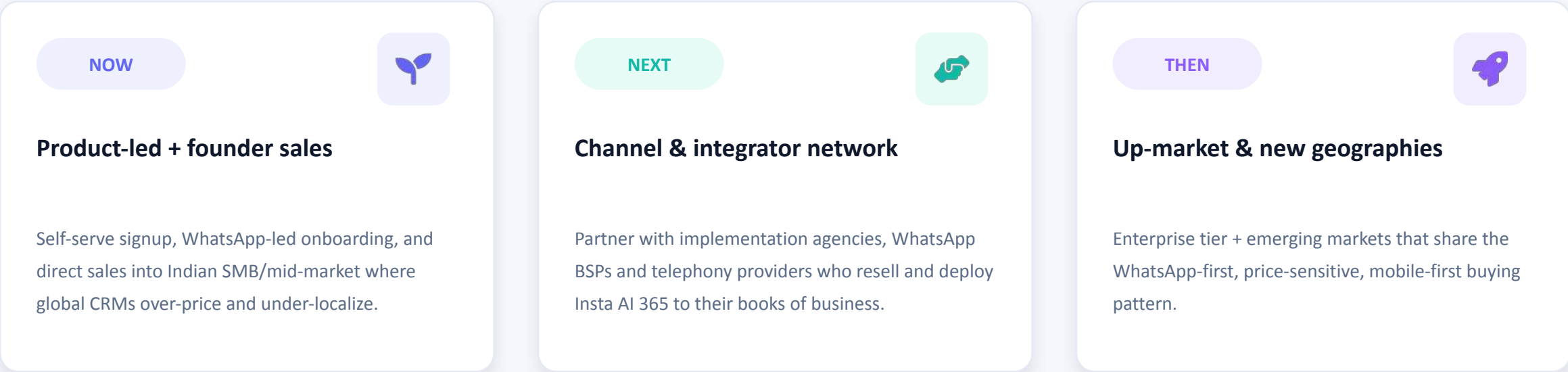
Marketplace (future)

Rev-share on integrations & templates

Land on Starter/Growth → expand seats & usage → convert to Enterprise.

Net-revenue-retention is the compounding engine.

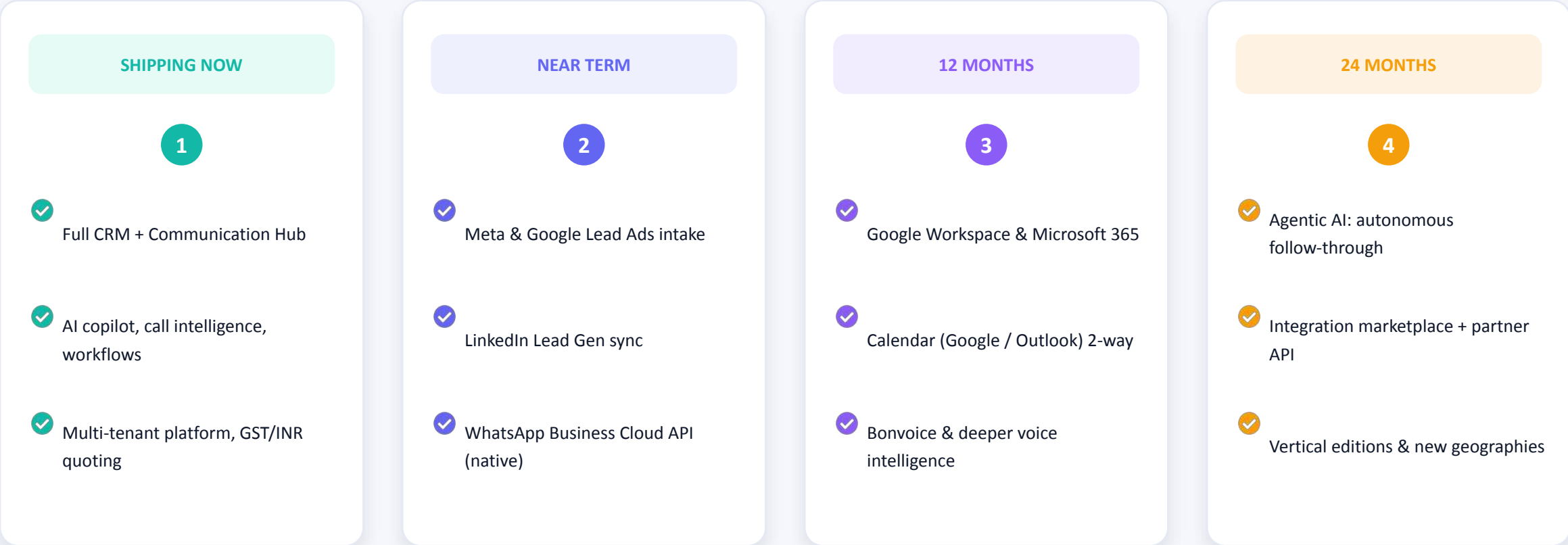
Win the under-served Indian mid-market, then expand by motion and geography.



Why customers switch to us

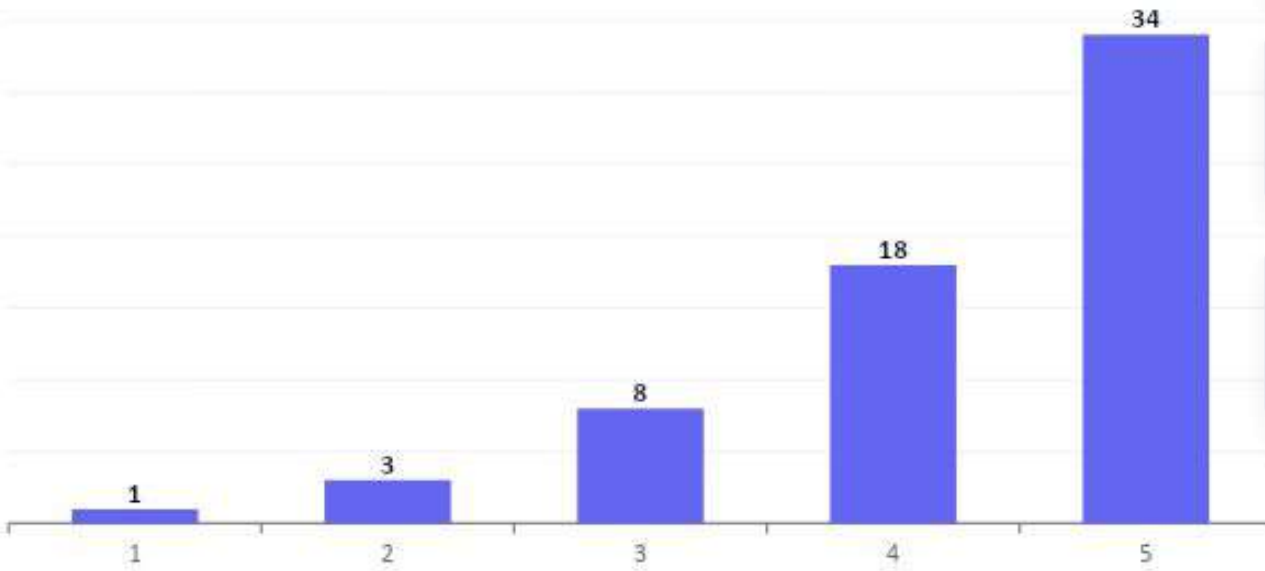
-  WhatsApp-native, not bolted on
-  INR & GST out of the box
-  Live in days, not months
-  A fraction of Salesforce's cost

From a live platform to the connected system of record for revenue.



A capital-efficient path to durable, compounding ARR.

Illustrative ARR trajectory



Indexed to Year 1 ARR. Illustrative model — to be replaced with your live actuals & projections.

80%+

Target gross margin

SaaS-native, provider-agnostic cost base

120%+

Net revenue retention

Seat + usage expansion inside accounts

< 12 mo

Efficient CAC payback

PLG + WhatsApp onboarding + channel

Raise fuels: product & AI R&D, GTM engine, and channel expansion.

Right product, right wedge, right time — and it already works.



Live, shipping product

A full multi-tenant platform with real modules, data and AI — not a pitch-stage concept.



Big, compounding market

\$73B → \$163B+ CRM, with AI-in-CRM and APAC the fastest-growing lanes.



Defensible wedge

Communication-first + India-native depth incumbents can't easily retrofit.



AI-native timing

Automation makes 'zero data entry' real — the moment the model becomes buildable.



Platform economics

Multi-tenant, API-first, provider-agnostic → high margin + expansion revenue.



Category tailwind

Buyers actively want to consolidate 8 tools into one intelligent system.

Let's build the system that runs the conversation.

We're raising to turn a working, India-first AI Communication CRM into the default platform for modern revenue teams. We'd love to show you a live walkthrough.



founders@instaai365.com



Coming Soon



+917404822465