CRM

CRM — Win the Client, Then Run the Relationship

A sales pipeline that quotes the real cost stack, and a service desk with enforced SLAs.

One CRM spans the whole client lifecycle — winning the deal and then running the relationship — and both halves do something a generic CRM can't, because the same platform that will run the client's payroll is underneath the pipeline and the support desk.

1 Sales CRM — win the client

Capability	What it does
Pipeline	Prospects, opportunities, stages, activities, quotas, forecast, and an onboarding-funnel view from first touch to signed; promote a prospect »» opportunity »» client in place.
Census quoting	Upload a prospect's census and generate a full, editable cost-stack quote — wages, taxes, **workers'-comp class-code lines**, benefits, and admin fee — plus a formal proposal, all attached to the opportunity.
Shadow trial	Recompute the prospect's payroll through the real engine and hand back a penny-diff-per-tax comparison against their current provider — proof, not a pitch.
AI-assisted selling	AI pre-qualification for PEO fit, opportunity enrichment, and drafted outreach — included, and activated with your own AI provider key.

2 Service CRM — run the relationship

Capability	What it does
Case desk	Full case management with attachments, history, templates, scheduled follow-ups, bulk actions, merge, and structured workflows for repeatable service processes.
SLA & escalation	Configurable SLAs with breach detection and alerting, and a conditional escalation-rules engine (evaluate rules, escalate, assign) so promises are measured and enforced.
Multi-channel intake	Email-to-case, phone / CTI call-to-case, and a client-facing portal with a service catalog — every channel lands as one tracked case, routed to the right specialist queue (benefits, retirement, insurance, payroll, tax).
Agent & measurement	Per-agent my-work and team-work / team-rollup queues, AI-drafted response suggestions, send-email from the case, and CSAT surveys with a summary.