



AI-driven sales assistance



Built-in communications



Smarter Sales.

Simpler Workflows.

Faster Growth.



Automated pipeline execution



Secure, scalable CRM architecture

What does **Twozo CRM** helps you do?



Connect with the right prospects at the right moment, engage with them across every channel and close more deals the smarter way.



Universal fit for any
device



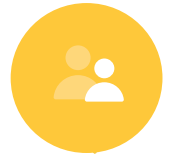
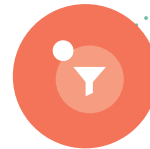
Mobile & Desktop
Ready App



Optimized for on-the-go teams

**Stay
productive,
responsive, &
connected;**

whether you're at your desk or in
the field



Where Sales, Communication & Intelligence Come Together



Nira AI-assistance for content generation



Centralized Hub for your customer datas



Visual pipelines & smart deal alerts



Plan strategically with Activities Module



Communications all-in-one place



Email tracking & bulk emailing



Real-time dashboards & forecasting



Automation that moves deals forward

Nira AI-assistance for content generation



⚡ Your AI-powered sales assistant, built into Twozo

Instantly generate personalized emails and follow-ups

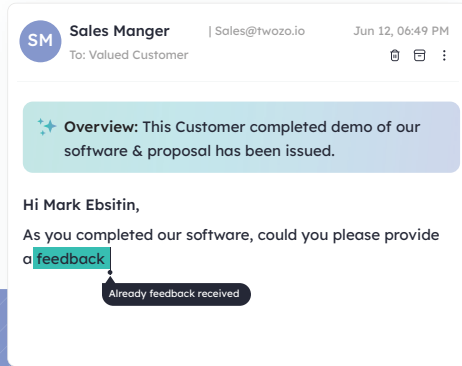
01

The interface shows a form for generating emails. It has three sections: 'Email Tone' with buttons for 'Catchy', 'Casual', 'Formal', and 'Humorous'; 'Email Length' with buttons for 'Short', 'Medium', and 'Long'; and 'Describe' with a text input area. A 'Generate' button is at the bottom right. A small circular icon with a star is in the top right corner of the form.

Summarizes conversations and rephrase messages/emails in real time with clarity saving valuable time.

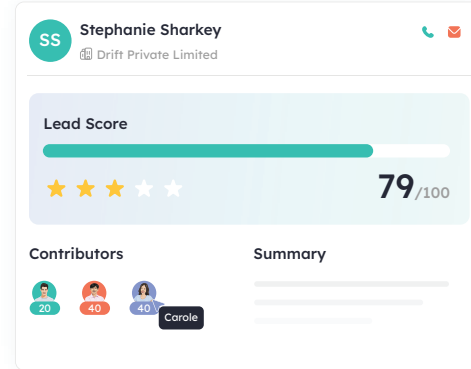
02

The interface shows an email summary. At the top, it says 'CS Customer Success | Support@twozo.io Jun 12, 06:49 PM To: Valued Customer'. Below this is a blue box with a star icon and the text 'Mail Summary: This Customer inquiry has been identified as a high-priority case due to it's nature.' Below the summary is the text 'Hi Team,' followed by three horizontal lines for additional content.



Create context-aware messages based on deal stage and customer data while maintaining a consistent tone

03



Lead Scoring boosts efficiency by saving time, identifying your hottest prospects, and recommending high-potential deals to prioritize, Smart lead scoring spots hottest leads instantly

04

Resulting

Faster outreach, better engagement, and higher response rates

Visual pipelines & smart deal alerts



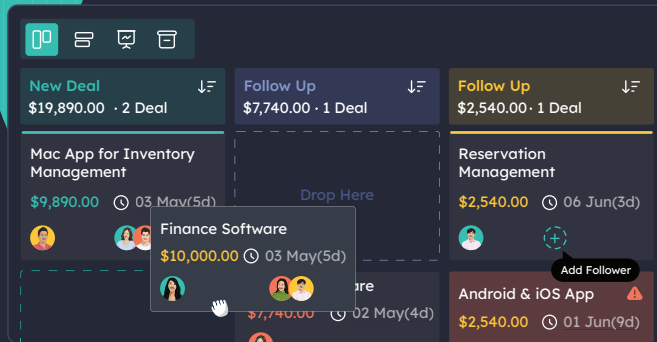
In pipeline view, collect, organize, engage with your deals.



Automated reminders ensure timely follow-ups



Forecast and pipeline projections based on deal stages and value



- Kanban-style pipeline with real-time deal movement
- Clear deal ownership, stage-wise visibility, stage transition rules
- Deal archive & add followers
- Smart deal rotting alerts highlight inactive or at-risk deals



Add Product to deal

Tax InclusiveNo Tax

Item	Price	Qty	Tax %	Discount %	Amount	
Product Mangement	\$99	1	5 %	0 %	\$99	×
Support Desk	\$199	1	5 %	0 %	\$199	×
Select	\$0	1	5 %	0 %	\$0	×

CRMImplementation

Subtotal\$347
Tax\$17.35
Total\$364.35

Manage and scale offerings by linking custom products, services, SKUs, and pricing

Smart Insights

Proactive deal management and not deal chasing	No leads/deals left behind
Built-in upselling and cross-selling opportunities	Shorter sales cycles
Accurate pipeline health & revenue forecast	

⚡ Resulting

Predictable revenue, healthier pipelines, and higher deal closure rates

Centralized Hub for your customer datas



In contacts center, manage, enrich every contact with complete history



Centralized contact database with complete profile details

Webforms to gather leads from various sources

01

Name

Email

Mobile

Message

Submit

Deal Created

Lead to customer journey with contact lifecycle stages

02

Kadin adim
Sales Manager

Last interaction a week Ago

Customize life cycle stage

Lead ^

New ↗

Contacted ↗

Qualified ↗

Qualified v

Customer v

+ Add Stage

03

Two way contact sync keeps data always updated



04

Automatic duplicate detection and merging



05

Fields & modules customizations to match every business process

A screenshot of the twozo user interface for customizing contact fields. It shows a tabbed interface with 'Contacts' selected. Below the tabs, there are fields for 'Name' and 'Mobile'. The 'Name' field has checkboxes for 'Add View' and 'Required'. The 'Mobile' field has a dropdown menu set to 'Phone' and a red 'X' icon. At the bottom, there is a link to 'Add Custom Field'.



Smart insights



Full interaction timeline (emails, calls, social media channels, files, notes)

Full customer & communication history in activity and deal

Followers, mentions, and internal notes for team collaboration

Centralized files access directly to contacts, companies, and deals

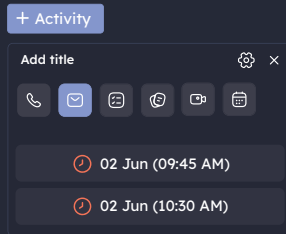
Resulting

Stronger relationships and higher engagement from first touch to closure

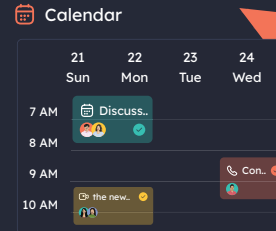
Plan strategically with Activities Module



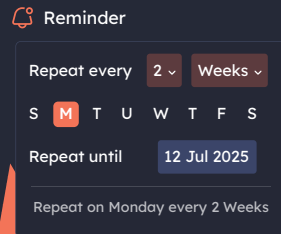
⚡ With Activity Module, plan, prioritize and execute every action with clarity



Custom sales activities aligned

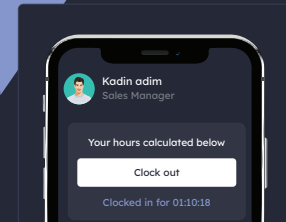


Activity calendar view with two-way sync



Activity alerts & reminders

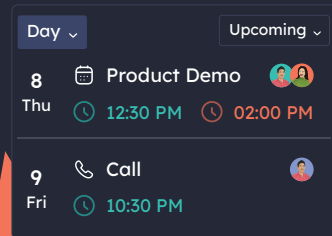
Check-in and check-out with geo-tagging





Encourage activity-based selling with activity goals

Activities



Get complete visibility of completed, pending, and overdue activities



Smart Insights



Improved follow-up consistency and sales execution



Higher productivity with structured daily workflows



Better visibility for managers into team activity performance

Resulting

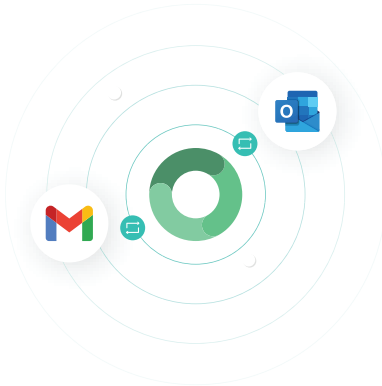
Strong daily sales discipline and consistent deal progress

Email tracking & bulk emailing



With Emails outreach, Track, stay connected & optimized inside Twozo

Two way email sync keeps all conversations logged



Personalized bulk email campaigns

All Email templates ▾

HR Emails

Reminder Emails

Announcement Email

Sub:

Hello {Contact Person},

Access ready-to-use email templates

To Hari Krishnan Keerthana
 Kumar +25 Others

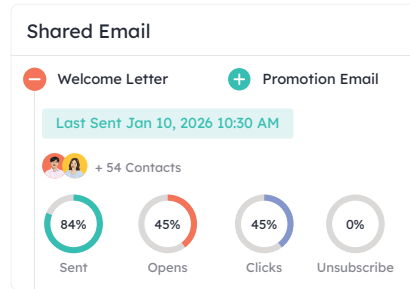
Message

Lexend ▾ 14 ▾ | | B I U | 99 |

Hello {Contact Person},



Sent Email Metrics in real-time



Shared Team Inbox for visibility and faster collaboration

Compose Email		Q Search	
Inbox	2 ^	☐	Wirot Richter 21 Jan 2026, 10:40 AM
Team Inbox		☐	Akshaya 21 Jan 2026, 10:30 AM
Sent		☐	
Tags		☐	

Smart Insights

Automatic email linking to contacts, deals, and activities

Consistent outreach and personalized communication

Helps sales teams prioritize hot leads based on email activity

Resulting

Higher email response rates and improved deal-to-customer conversion

Communications all-in-one place



⚡ Built-in calling & Cloud Telephony

Make, track and analyze calls directly from Twozo CRM

One-click calling: Outbound and Inbound calls from contacts or Deals

Call recording for quality review and training

Call Log

All Calls ▾

Wirot Richter
Outgoing Call

Akshaya
Incoming Call

Team twozo - (91) 99210-24975

Sunil Kumar
+919876543210

00:01

Dialpad Note Record Mute Hold Transfer

Timeline

All Activities ▾

Call by Gurnal 05:20 pm

00:43

Notes

Scheduled personal consultation for tomorrow

Smart Insights

- Complete call history available in Timeline
- Better visibility of inbound and outbound calls

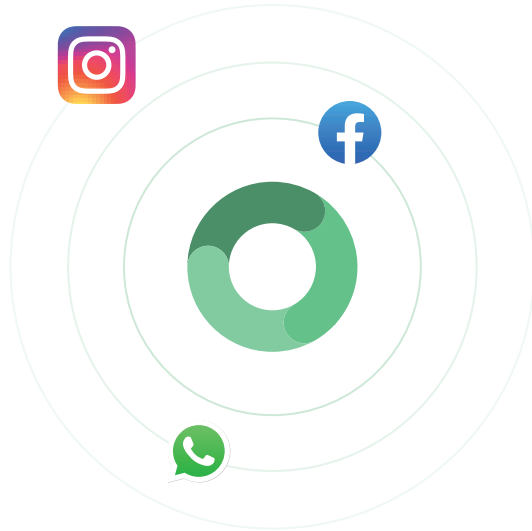
Resulting

More productive calls, higher conversion from conversations to customers

Built-in Native Integrations



⚡ Whatsapp, Instagram & Facebook: Engage prospects where they already are within Twozo CRM



Opportunity to enhance social media leads engagement

Automatic logging in contacts and deals

Centralized Inbox for all Social Media Channels with real-time notifications

⚡ Twozo's Open API

Plug & Play Freedom:

Connect Twozo with any tool you love

Build Without Limits & Future-Ready Scale:

As your business grows, Twozo CRM grows with you

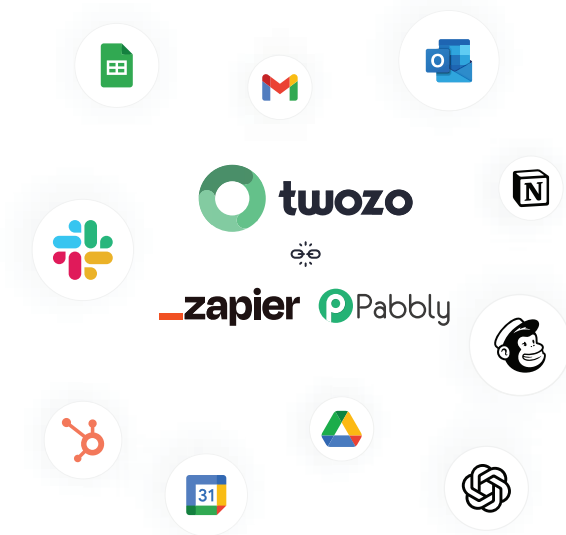
✦ Resulting

Higher responsiveness, better customer experience, and more conversions from social channels

⚡ Zapier and Pabbly: Twozo fits into your existing stack effortlessly



2000+ apps, one connection



- One click & Ready to use Integrations with the stacks you love
- Automating cross-tool data flow
- Automate anything and create workflows associated with different teams like sales, marketing, productivity, finance and other apps

Resulting

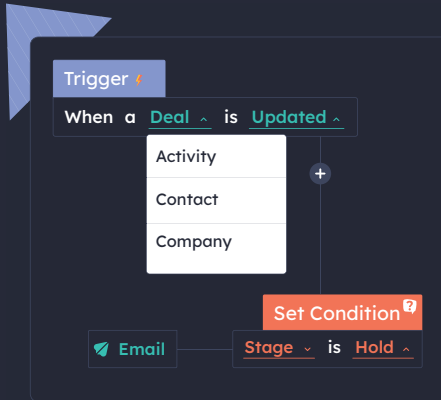
3x more workflow execution, A fully connected CRM ecosystem that scales with your business

Automation that moves deals forward



⚡ Workflow automation: Automate routine work. Standardize process. Scale faster

Automatically assign leads, deals, and activities to the right sales reps based on different criteria



- Stage-based & follow-up automations
- Trigger actions between stages & Email & communication Triggers
- Auto-create activities & Set reminders
- Approval & controlled workflows in hierarchy-wise

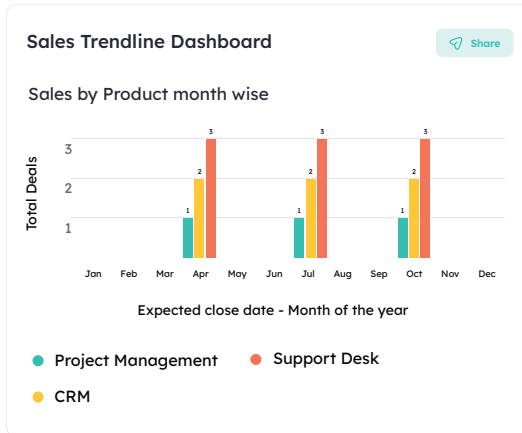
Resulting

More selling time, faster deal movement, Zero deals/activity leakage and predictable revenue growth

Real-time dashboards & forecasting

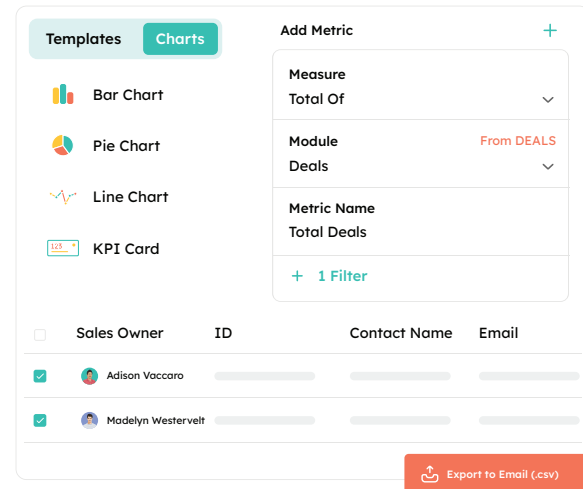


⚡ Twozo turns real-time data into confident decisions



- ◆ Build custom dashboards designed for your KPIs, teams and business goals
- ◆ Visualize data with dynamic charts & reports
- ◆ Measure metrics of every activities
- ◆ Drill down from charts to raw data for complete transparency

- ◆ Track live sales performance, pipeline health, activities, and revenue in real time
- ◆ Access ready-made dashboards hierarchy-wise



Smart & Powerful reporting:



- ◆ Advanced data sorting, filtering, and segmentation
- ◆ Generate report copies for sharing or offline analysis with teams and leadership
- ◆ Switch Chart types & Reuse chart templates for faster report creation

Metric Name

Total Deals

+ 1 Filter

Periodic Filter

Created At ▾ In the last ▾ 90 Days ▾ ✕

Filter

Company Name ▾ Includes ▾

Drift Pvt Ltd ✕ Drift Pvt Ltd ✕ Search ▾ ✕

Share Dashboard



Just me

Shared with

Search Users, Teams, Territories

Users / Teams / Territories Access

☐ Everyone -

Resulting

Complete control over your numbers. To take data-driven decisions

Data **Secure & Compliant** reliable CRM



- ◆ Two-factor Authentication
- ◆ Audit Logs
- ◆ Enhanced permission sets & more

Industry **Standard** Certifications



ISO 27001:2013



NIST SP 53 Rev.5

From implementation to **long-term success**



⚡ Twozo is there with you at every step

Implementation & Set-up Support

- ◆ Guided CRM Setup
- ◆ Secure data migration (from existing CRMs/spreadsheets with full data validation)
- ◆ Tailored pipelines, custom fields, stages & workflows configuration.

Onboarding & Go-live Support

- ◆ Live training to ensure rapid adoption
- ◆ Go-live support to improve and scale
- ◆ Ongoing product enhancement updates

Dedicated Growth Support

- ◆ Phone, Online, Knowledge Base, Helpdesk Support when you need it

• Resulting

Faster implementation, higher adoption, confident teams and measurable revenue growth



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