

AI CRM + WEB DEVELOPMENT

Keep every opportunity moving forward

Custom CRM systems, B2B websites, customer portals, and AI-assisted workflows for established teams.

Website inquiry

Assigned to sales 



 **Follow-up task ready**

A clear next step for your team.

The work beyond your website

Your website is one part of the customer experience. The next opportunity may be the process behind it.

01

RFQs scattered across inboxes

Customer requests arrive, but ownership, specifications, and the next action live in different places.

02

Follow-up depends on memory

A quote goes out. The next conversation waits for someone to remember it.

03

Every handoff starts over

Sales and operations re-enter details because their tools do not share the full picture.

Three ways to connect the work

Web development

Give buyers a clear path to your capabilities, products, and team. Capture the context sales needs to take the next step.

- B2B websites and product information
- RFQ forms and inquiry routing
- Search-focused service content

Custom AI CRM

Bring accounts, contacts, opportunities, quotes, and follow-up into a process your team can understand and use.

- Account and opportunity visibility
- Assigned owners and next actions
- AI summaries and reply drafts

Portals + automation

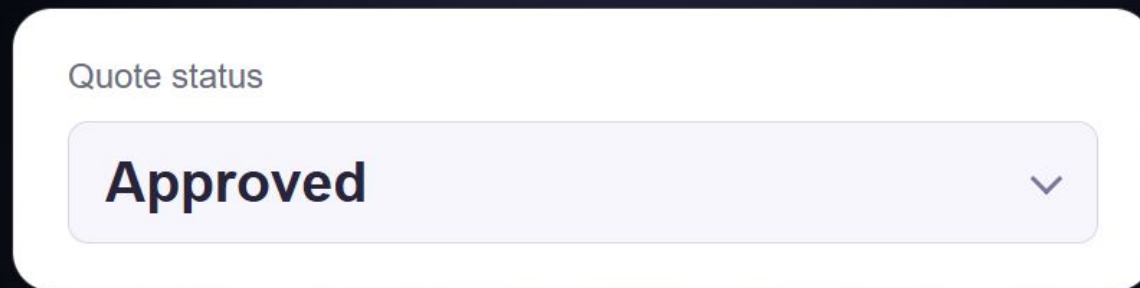
Connect approvals, documents, project updates, and internal handoffs so the same information supports the next team.

- Customer and distributor portals
- Status-driven tasks and notifications
- Role-based access and reporting

STATUS-DRIVEN AUTOMATION

One status change. The next step starts.

Mark a quote Approved to notify operations and create the next team's handoff task.



✓ **Operations handoff created**

The next team gets the approved details.

Illustrative workflow. Integrations and approval rules are scoped for your business.

AFTER QUOTE APPROVAL

Create customer invoice

Connected to QuickBooks



 **Invoice created in QuickBooks**

Linked back to the approved quote.

CONNECTED ACCOUNTING

Approved quote. Invoice created.

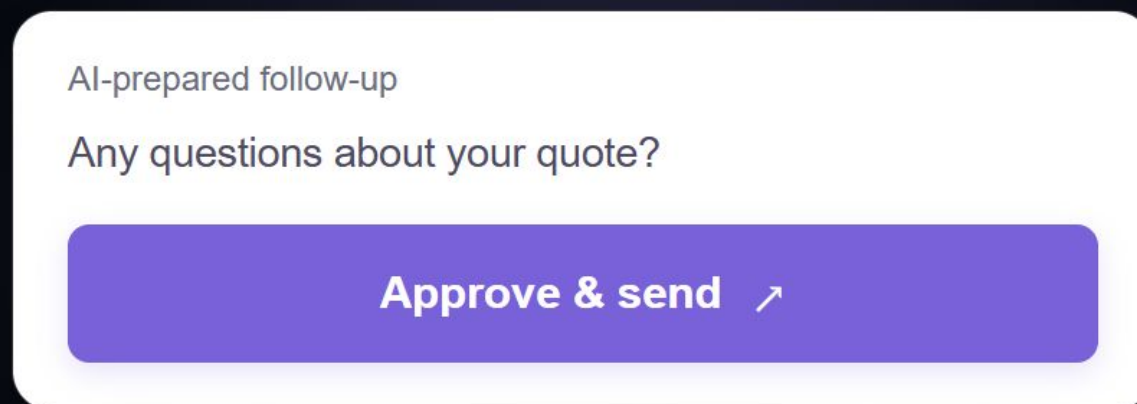
An enabled rule creates the customer invoice in QuickBooks from the approved quote.

Illustrative workflow. Integrations and approval rules are scoped for your business.

AI-ASSISTED FOLLOW-UP

A ready reply. One approval.

AI prepares the follow-up. Your team reviews it and sends it when the time is right.

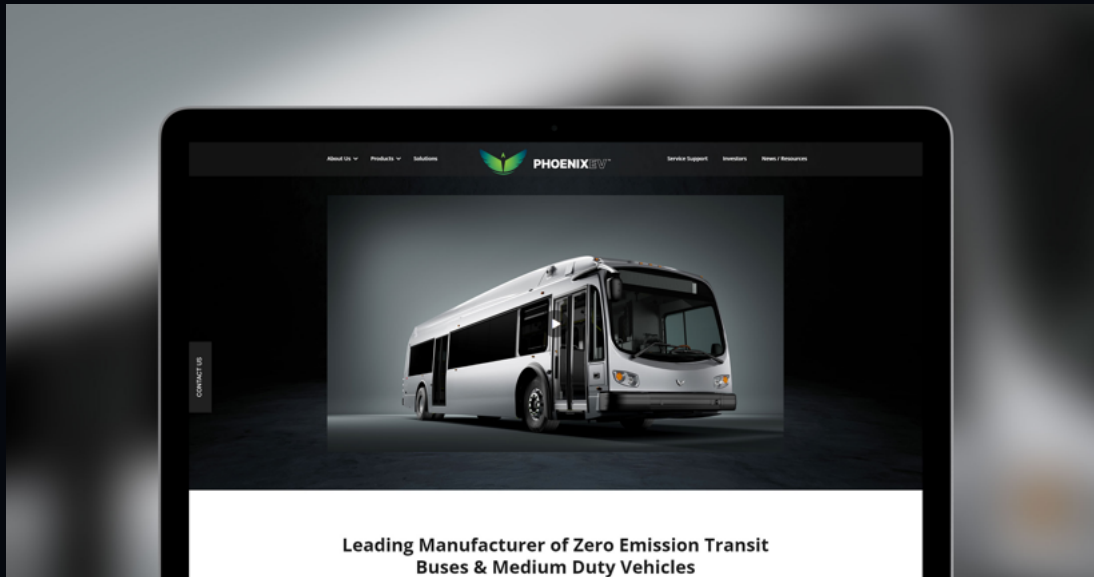


Customer follow-up sent

Your team approves the message first.

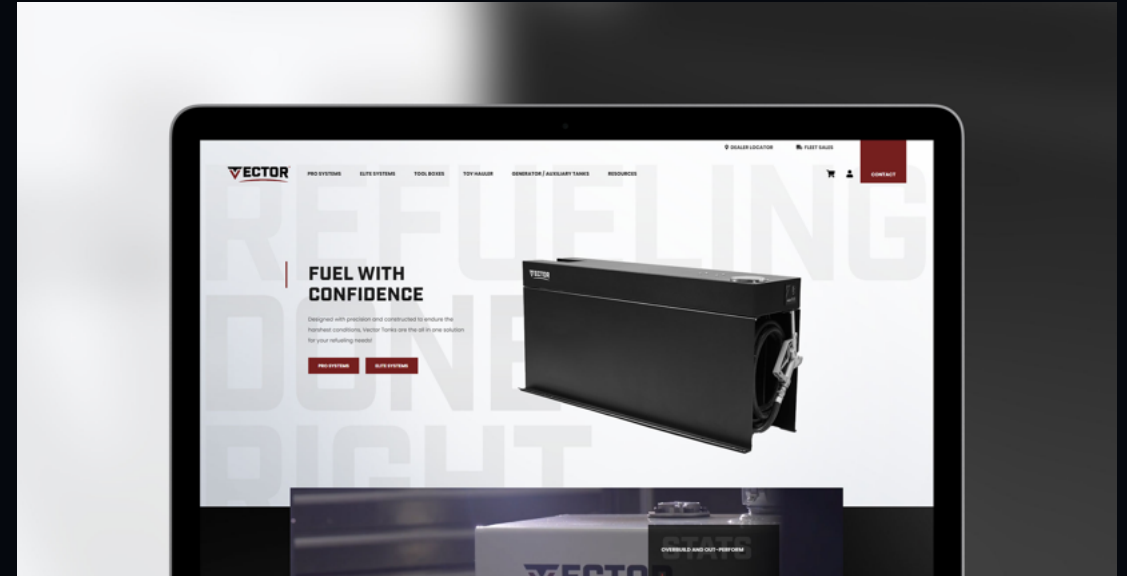
Illustrative workflow. Integrations and approval rules are scoped for your business.

Website work for business audiences



PhoenixEV

Manufacturing and public sector



Vector Performance

Ecommerce and manufacturing

Selected website projects. CRM and automation examples in this overview are illustrative, not claims about these deployments.

A focused first project

We can extend existing tools, connect systems, or build a custom workflow when the requirements justify it.

01

Map the work

Review your tools, customer journey, roles, and the points where work gets stuck.

02

Design the first workflow

Define the screens, statuses, rules, integrations, and approvals around one useful process.

03

Build and pilot

Test with representative scenarios and the people who will use the system.

04

Launch and improve

Train the team, introduce the workflow in stages, and review what needs to work better.

Your next connection

Bring one workflow. Let us help map what comes next.

Share the process, the tools involved, and where work gets stuck.
We can define the next useful website, CRM, portal, or automation project.

Talk through your workflow

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