AI-POWERED CLIENT & DELIVERY MANAGEMENT

Threatsys CRM 360

Clients · Pipeline · Delivery · Renewals

Every signal and interaction turned into one relationship - leads, proposals, engagements, consultants, invoices and renewals unified in a single platform.

- **EVERY DEAL. EVERY DELIVERABLE.**

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THREATSYS ONE AI

Your all-in-one cybersecurity suite, extraordinarily unified

SOC, GRC, CRM, AppSec, DPDP and LMS - unified under a single roof. One platform, one login, one intelligence layer powering every layer of your security posture.

threatsys soc360 ai

AI-Native Security Operations Console

AI SIEM, SOAR, FIM and XDR fused into one AI-driven response system with threat hunting and an agentic SOC assistant.

threatsys grc360 ai

Every risk. One record. All-in-one control.

Risk, policy and audit converged into one self-updating compliance cycle - audit automation, scoping and evidence.

threatsys DPDP360 ai

AI-Mastered DPDP Suite

Consent, rights, grievance SLAs, notices, DPIAs, vendor risk and evidence for the DPDP Act, 2023.

THIS DECK

threatsys CRM360 ai

Effortless AI-powered delivery management

Every signal and interaction turned into one relationship - clients, engagements and delivery unified in one place.

threatsys appsec360 ai

Automated Application Security Testing

SAST, DAST, API testing and PTaaS with validated, evidence-backed findings across code and cloud.

threatsys LMS360 ai

Building a cyber-ready workforce

Enterprise cybersecurity training, compliance awareness and placement-linked skilling through practical learning.

ONE PLATFORM · ONE LOGIN · 360° COVERAGE

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SPOTLIGHT

FOCUS · 1 OF 6

A CRM built around delivery, not just deals

Sales systems stop at the signature. CRM 360 carries the client through scoping, staffing, fieldwork, deliverables, invoicing and renewal - so the promise made in the proposal is the work that gets delivered.

- One client record
- Tenant-aware access
- Audit trail on every change
- Works with the Threatsys suite

Relationship

Contacts, emails, meetings and documents in one timeline

Every contact, conversation and document against one client record.

- Contacts, roles and decision makers
- Meetings, calls and email history
- Documents attached to the account

Pipeline

Stage, owner, value and expected close date

Leads to proposals to signed orders, with owners and forecast dates.

- Stage, owner and next action
- Weighted value and close date
- Ageing and stalled-deal alerts

Delivery

Scope carried straight into the engagement plan

Engagements, consultants, milestones and deliverables in one plan.

- Milestones and consultant allocation
- Fieldwork status and blockers
- Deliverables with client sign-off

Renewal

Expiry dates tracked from the day of sign-off

Certificate and contract expiry tracked long before it lapses.

- Certificate and contract expiry
- Re-audit and retest cycles
- Reminder ladder with an owner

PLATFORM OVERVIEW

One platform for the entire client lifecycle

From the first enquiry to the renewal conversation, every stage lives in one system with one owner, one timeline and one set of numbers.

01 Acquire

Capture enquiries from web, email, referrals and campaigns.

- Web, email, referral and campaign
- Duplicate check on entry
- Owner assigned automatically

Every enquiry gets an owner within the day

02 Win

Scope, quote, propose and convert with approvals on record.

- Service-specific scoping templates
- Effort, rate card and margin
- Approval trail on every version

Approved scope, priced and version-controlled

03 Deliver

Plan engagements, staff consultants, track milestones and evidence.

- Plan generated from the signed scope
- Consultants matched by skill
- Evidence collected as work happens

Milestones, consultants and evidence in one plan

04 Bill

Raise invoices against milestones and chase what is due.

- Invoice on milestone sign-off
- Ageing and follow-up owners
- Part payments and credit notes

Invoices tied to signed-off milestones

05 Renew

Track expiry, re-audit cycles and upsell the next engagement.

- Expiry register by standard
- Staged reminders to the owner
- Upsell signals from usage

Reminders at 90, 60 and 30 days

WHY A PURPOSE-BUILT CRM

Spreadsheets lose deals. Generic CRMs lose delivery.

WITHOUT A PURPOSE-BUILT CRM

The problem today

Enquiries sit in inboxes, scopes live in spreadsheets, consultant availability is a WhatsApp thread and renewals are remembered late.

- Enquiries lost in inboxes
- Availability tracked on chat

For the business

Forecast built on real stages and dates, not optimism - and a clear view of what each client is worth.

- Forecast built on real stages
- Client value visible at a glance

Revenue leaks quietly · Predictable revenue

WITH THREATSYS CRM 360

What changes with CRM 360

One pipeline, one scoping standard, one capacity view and an automatic renewal calendar with owners and dates.

- One pipeline, one scoping standard
- Renewals on a calendar

For delivery

Consultants see their week, clients see their progress, and every deliverable is versioned and traceable.

- Consultants see their week
- Clients see their progress

Nothing falls through · Fewer surprises

ONE PLATFORM, EVERY TEAM

Built for the people who sell and the people who deliver

Sales & business development

Pipeline, follow-ups, quotations and conversion in one queue.

- Follow-ups queued daily
- Quotes raised from templates

Sees: my deals, my follow-ups, my number

Pre-sales & scoping

Standard scoping templates, effort estimates and approval trails.

- Standard effort estimates
- Approvals before issue

Sees: requests to scope and estimates to approve

Delivery leads

Engagement plans, staffing, milestones and client escalations.

- Engagement health at a glance
- Escalations tracked to closure

Sees: engagement health and who is free

Consultants & auditors

A clear week: assignments, timesheets, deliverables and retests.

- Assignments and timesheets
- Deliverables and retests

Sees: this week, my tasks, my deliverables

Finance

Milestone invoicing, receivables ageing and revenue recognition.

- Milestone invoices raised
- Receivables chased on time

Sees: what to invoice and what is overdue

Leadership

Pipeline, utilisation, delivery health and renewals on one screen.

- Pipeline against target
- Utilisation and cash trend

Sees: pipeline, utilisation, cash and renewals

THE OPERATING MODEL

Capture · Win · Deliver · Renew

01

Capture

Every enquiry lands in one queue with a source, an owner and a next action.

- Single intake queue
- Source and service recorded
- Response clock starts

Owner and next action set

02

Win

Scope, quote, approve and convert - with the signed scope carried forward.

- Scope agreed and priced
- Approvals captured
- Order value confirmed

Signed scope on record

03

Deliver

Staff the engagement, run the fieldwork, publish deliverables and sign off.

- Consultants and dates locked
- Status reviewed weekly
- Deliverable published

Evidence and sign-off captured

04

Renew

Track expiry and re-audit dates, then reopen the conversation on time.

- Expiry tracked from day one
- Owner alerted in advance
- Next scope drafted early

Next engagement opened

MODULE LANDSCAPE

The complete CRM 360 module landscape

Four groups - relationship, revenue, delivery and assurance - working from the same client record.

01 Clients & contacts

Accounts, contacts, entities, group structures and relationship owners.

- Group structures supported
- Relationship owner named

02 Leads & pipeline

Sources, stages, activities, reminders and weighted forecast.

- Sources and campaigns tracked
- Reminders on every deal

03 Quotes & proposals

Scoping templates, effort and pricing, versions and approvals.

- Rate cards and discounts
- Version history retained

04 Engagements

Projects, phases, milestones, dependencies and status.

- Phases and dependencies
- Status reviewed weekly

05 Resourcing

Consultant skills, availability, allocation and utilisation.

- Skills and certifications held
- Bench and leave visible

06 Deliverables

Reports, evidence, versions, review and client sign-off.

- Internal review before issue
- Client acceptance captured

07 Billing

Milestone invoices, receivables, ageing and payment status.

- Schedules per engagement
- Ageing and reminders

08 Renewals

Certificate expiry, re-audit cycles, reminders and owners.

- Expiry by client and standard
- Owner alerted in advance

LEADS & PIPELINE

Every enquiry owned, staged and followed up

01	**Capture**	Web enquiries, email, referrals, events and campaign responses land in a single queue. Duplicate check on entry · Response clock starts	**No enquiry without an owner**
02	**Qualify**	Requirement, framework, scope size and timeline captured against a standard checklist. Framework and scope size · Budget and timeline noted	**Consistent qualification**
03	**Progress**	Defined stages with an activity log, next action and expected close date on every deal. Next action on every deal · Expected close date held	**Forecast you can trust**
04	**Prioritise**	Weighted value, ageing and stalled-deal alerts surface where attention is needed. Weighted value ranking · Stalled deals surfaced	**Attention where it pays**
05	**Convert**	A won deal becomes an engagement with the scope, value and contacts already attached. Scope and contacts carried over · Delivery notified automatically	**No re-keying**
06	**Learn**	Win and loss reasons recorded and reported by service line and segment. Win and loss reasons · Reported by service line	**Better next quarter**

SCOPING, QUOTES & PROPOSALS

From requirement to signed scope, without the guesswork

01

Standard scoping

Service-specific templates for VAPT, audit, compliance and managed services - so two teams scope the same job the same way.

- Templates per service
- Consistent assumptions

Repeatable estimates

02

Effort & pricing

Effort in person-days, rate cards, discounts and margin visible before the quote goes out.

- Person-days and rate cards
- Margin checked before issue

Margin protected

03

Versions & approvals

Every revision kept, with who approved which version and when.

- Every revision retained
- Approver and date recorded

Defensible record

04

Conversion

The approved scope becomes the delivery plan - milestones, effort and deliverables pre-filled.

- Milestones pre-filled
- Effort carried into the plan

Sales meets delivery

ENGAGEMENT DELIVERY

The engagement plan everyone works from

01

Plan

Phases, milestones and dates generated from the signed scope.

- Phases from the signed scope
- Client dependencies listed
- Dates confirmed in writing

Dates agreed with the client

02

Staff

Consultants assigned by skill and availability, with backup named.

- Skills and clearance matched
- Availability checked
- Backup consultant named

Named consultant and backup

03

Execute

Fieldwork status, blockers and client dependencies tracked daily.

- Daily status and blockers
- Evidence captured in place
- Escalations logged

Blockers visible daily

04

Close

Deliverable published, sign-off captured and lessons recorded.

- Report reviewed internally
- Client acceptance recorded
- Lessons fed back to scoping

Deliverable accepted formally

CONSULTANTS & CAPACITY

Know who is free, who is stretched and what it costs

Skills register

Certifications, specialisations and clearance held against each consultant.

- Certifications and clearance
- Specialisation by service

Right person, right job

Availability

A calendar view of allocations, leave and bench across the team.

- Allocations, leave and bench
- Calendar view per team

No double booking

Allocation

Assign to engagements with effort booked against the milestone.

- Effort booked to milestones
- Conflicts flagged early

Plan meets reality

Timesheets

Time logged against engagement and task, approved by the delivery lead.

- Time against engagement task
- Approved by the delivery lead

Actuals captured

Utilisation

Billable versus non-billable by person, team and month.

- Billable versus non-billable
- By person, team and month

Capacity you can price

Forecasting

Pipeline demand compared with available capacity before you commit.

- Pipeline demand versus capacity
- Hiring signals early

Commit with confidence

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CLIENT COLLABORATION

One place for the client to see progress and respond

Shared status

Fewer status calls

Engagement progress, upcoming milestones and what is pending from whom.

- Progress against milestones
- What is pending from whom
- Upcoming dates and visits

Evidence requests

Delays made visible

Document and evidence requests tracked with owners and due dates.

- Request list with due dates
- Upload directly to the request
- Automatic reminders on delay

Secure documents

No loose email attachments

Reports and evidence exchanged in the platform, versioned and access-controlled.

- Versioned reports and evidence
- Access-controlled per user
- Download activity logged

Sign-off

Closure on record

Formal acceptance captured against the deliverable with a timestamp.

- Formal acceptance per deliverable
- Timestamp and approver recorded
- Closes the milestone for billing

BILLING & RECEIVABLES

Invoice when the milestone is met, chase what is overdue

01 Milestone invoicing

Invoices raised against completed, signed-off milestones.

- Triggered by accepted deliverables
- Schedule visible to the client
- Disputes logged against the line

No invoice without a signed milestone

02 Receivables

Outstanding amounts, ageing buckets and follow-up owners.

- Ageing buckets by client
- Named chaser and next contact
- Escalation after agreed thresholds

Cash conversion at a glance

03 Payment status

Part payments, credit notes and settlement recorded on the engagement.

- Part payments and credit notes
- Settlement posted to the engagement
- Statement export per client

Settlement visible on the engagement

04 Revenue view

Booked, delivered and invoiced value by client, service and month.

- Booked, delivered and invoiced
- By client, service and month
- Compared against target

Booked, delivered and invoiced side by side

RENEWALS & COMPLIANCE CALENDAR

The renewal conversation starts before the certificate expires

Expiry register

Certificate and report validity tracked per client and per standard.

- Validity per standard
- Client-wise renewal list

Nothing lapses quietly

Re-audit cycles

Annual audits, quarterly scans and periodic retests scheduled ahead.

- Annual audits scheduled
- Quarterly scans planned

Recurring revenue secured

Reminder ladder

Staged reminders to the owner at 90, 60 and 30 days.

- 90, 60 and 30-day nudges
- Escalation if unanswered

Timely outreach

Upsell signals

Adjacent services suggested from what the client already buys.

- Adjacent services suggested
- Based on current scope

Account growth

Contract terms

Value, duration, notice period and escalation clauses on record.

- Value, duration and notice
- Escalation clauses on record

No surprises at renewal

Renewal forecast

Expected renewal value by month, with risk flagged early.

- Expected value by month
- Risk flagged early

Plan the year

DASHBOARDS & REPORTING

The business on one screen

Four groups - relationship, revenue, delivery and assurance - working from the same client record.

01 Pipeline health

Value by stage, ageing, conversion rate and forecast against target.

- Value by stage and ageing
- Conversion against target

02 Delivery health

Engagements on track, at risk and overdue, with the reason recorded.

- On track, at risk, overdue
- Reason recorded per engagement

03 Utilisation

Billable capacity by team and month against plan.

- Billable versus non-billable
- By person, team and month

04 Receivables

Outstanding value, ageing and collection trend.

- Ageing buckets by client
- Named chaser and next contact
- Escalation after agreed thresholds

05 Renewals

What is due, what is at risk and what has been secured.

- Expiry by client and standard
- Owner alerted in advance

06 Service mix

Revenue and margin by service line and client segment.

- Revenue by service line
- Margin by client segment

AUTOMATION, AI & INTEGRATIONS

The routine work handled for you

01

Workflow automation

Stage changes, reminders, approvals and handovers triggered automatically.

- Stage changes and handovers
- Approval routing by value
- Escalation when SLAs slip

Less chasing, fewer dropped handovers

02

AI assistant

Drafts follow-ups, summarises an account history and flags stalled deals.

- Drafts follow-up emails
- Summarises the account history
- Flags deals going quiet

Minutes saved on every account review

03

Notifications

Email and in-app alerts to the right owner at the right moment.

- Email and in-app alerts
- Digest or real-time per user
- Routed to the current owner

The right person told at the right time

04

Integrations

Email, calendar, accounting and the wider Threatsys suite.

- Email and calendar sync
- Accounting and invoicing tools
- GRC 360, DPDP 360 and AppSec 360

One record, shared across the suite

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SECURITY & DATA PROTECTION

A CRM that holds audit data must behave like one

01	**Access control**	Role and tenant-based permissions down to record and field level. Role and tenant permissions · Field-level restrictions	**Least privilege**
02	**Audit trail**	Every create, change and export logged with user, time and reason. User, time and reason logged · Exports recorded	**Defensible history**
03	**Data residency**	Hosted in India with DPDP-aligned retention and deletion rules. Hosted in India · Retention and deletion rules	**Compliant by design**
04	**Encryption**	Data encrypted in transit and at rest, with key management controls. In transit and at rest · Key management controls	**Protected at every layer**
05	**Secure sharing**	Time-bound, access-controlled document links instead of email attachments. Time-bound document links · Access revoked on close	**Controlled disclosure**
06	**Tested continuously**	Assessed with AppSec 360 - SAST, DAST and manual VAPT on our own platform. SAST, DAST and manual VAPT · Assessed with AppSec 360	**We eat our own cooking**

RECOMMENDED DEMO FLOW

How to walk a client through CRM 360

Demo storyline

1 · Log a new enquiry and assign an owner in the live console.

2 · Scope it from a service template and generate the quotation.

3 · Approve, convert to an engagement and staff the consultants.

4 · Show fieldwork status, deliverable versions and client sign-off.

5 · Raise the milestone invoice and show receivables ageing.

6 · Open the renewal calendar and show what is due next quarter.

Tip Use a real account end to end - one client carried from enquiry to renewal explains the platform faster than a feature tour.

ROLLOUT & VALUE

Rollout phases and client value

A practical path from data migration to a business running entirely on one record.

Phase 1 · Weeks 1-2

Foundation

Tenant setup, users and roles, client and contact migration, service catalogue and rate cards.

- Users, roles and permissions
- Clients and contacts migrated

Phase 2 · Weeks 3-6

Operate

Pipeline and scoping live, engagements planned and staffed, timesheets and deliverables in use.

- Pipeline and scoping live
- Timesheets in daily use

Phase 3 · Quarter 2

Assure

Billing and renewals automated, dashboards adopted by leadership, integrations switched on.

- Billing and renewals automated
- Dashboards adopted by leadership

Client value

Nothing missed
Owner on every enquiry

Faster scoping
Templates, not blank pages

Higher utilisation
Capacity you can see

Renewals secured
Calendar, not memory

Thank you

Let us walk your team through CRM 360 with your own service lines - enquiry to renewal, on one record.

• EVERY DEAL. EVERY DELIVERABLE.

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