



INNOVATEXP

INNOVATE. TRANSFORM. EXPERIENCE

SmartSales CRM

Turn Every Lead into Loyal Customers

Omni-channel Intelligence · AI Sales Agent · Automated Follow-Up



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Are You Losing Leads in the Digital Noise?

Fragmented Conversations

Potential clients are scattered across WeChat / WhatsApp / IG / Email / Telegram without a unified record

Spreadsheet Graveyard

High-value prospects get buried in manual lists; leadership can't act with confidence in real time

Delayed Follow-ups

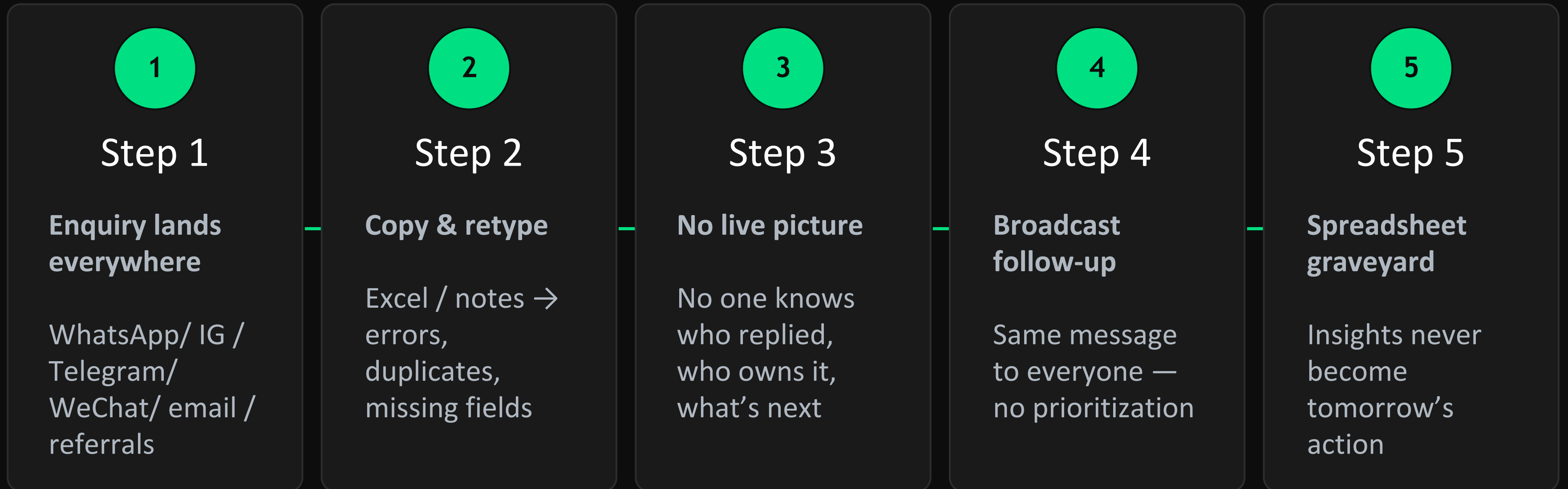
Response times are slow, and warm leads go cold before your team even says "Hello."



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Traditional Sales Flow

Friction in Your Pipeline Is Costing You Revenue.



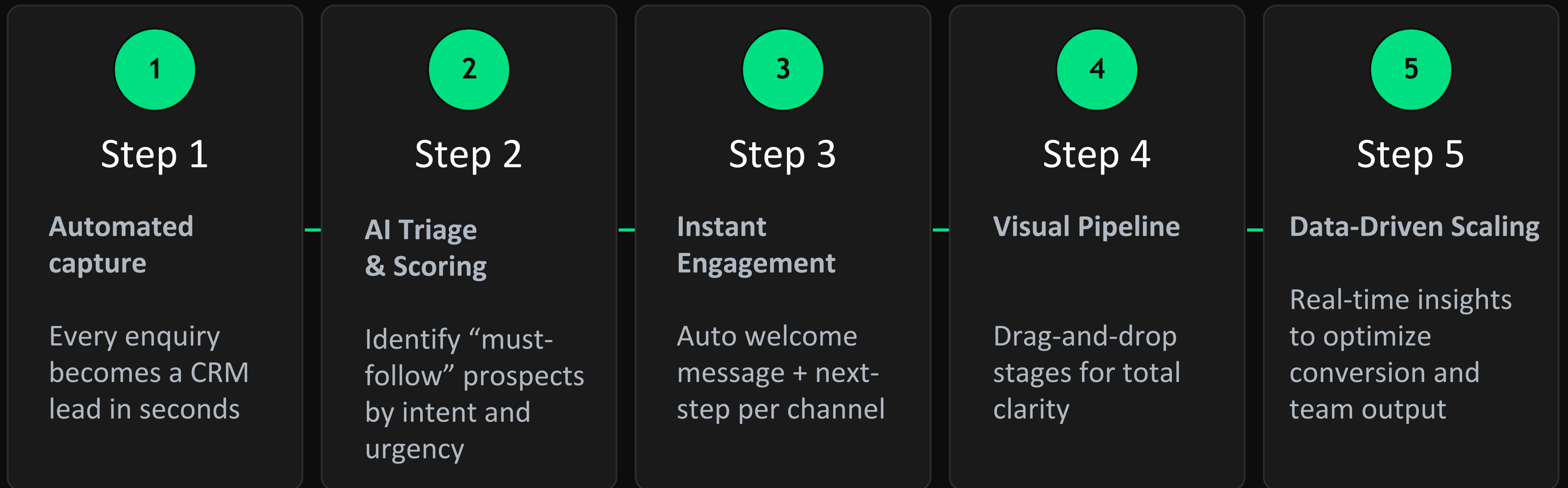
Stop losing the first day of your lead to admin.



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What if?

A Unified, AI-Driven Sales Engine



Book a 20-minute demo — see enquiry → AI triage → follow-up list in one flow.



Why InnovateXP?

InnovateXP combines CRM workflow, integrations, and AI so SMEs get a managed path — not just another inbox tool.

SmartSales is an omni-channel CRM + AI agent workflow, delivered as a managed system — not just an inbox tool.



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Why SmartSales CRM?

01

Omni-channel by Design

Connect the channels your market actually uses

02

Agentic Workflows

AI Agents reduce admin: summarize, tag, draft, remind, and route.

03

Managed Service

We build, deploy, and optimize the system with you—fast, practical, and scalable.



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SmartSales CRM Core Capabilities - Three Pillars of Sales Excellence

Turn conversations into a sales system.

01

Smart Capture

A unified inbox that acts like your 24/7 front desk.

02

Lead Intelligence

AI that summarizes needs and predicts intent.

03

Conversion Analytics

Visualize the journey from **Hello** to **Paid** — with reports.

Unified Inbox Automation

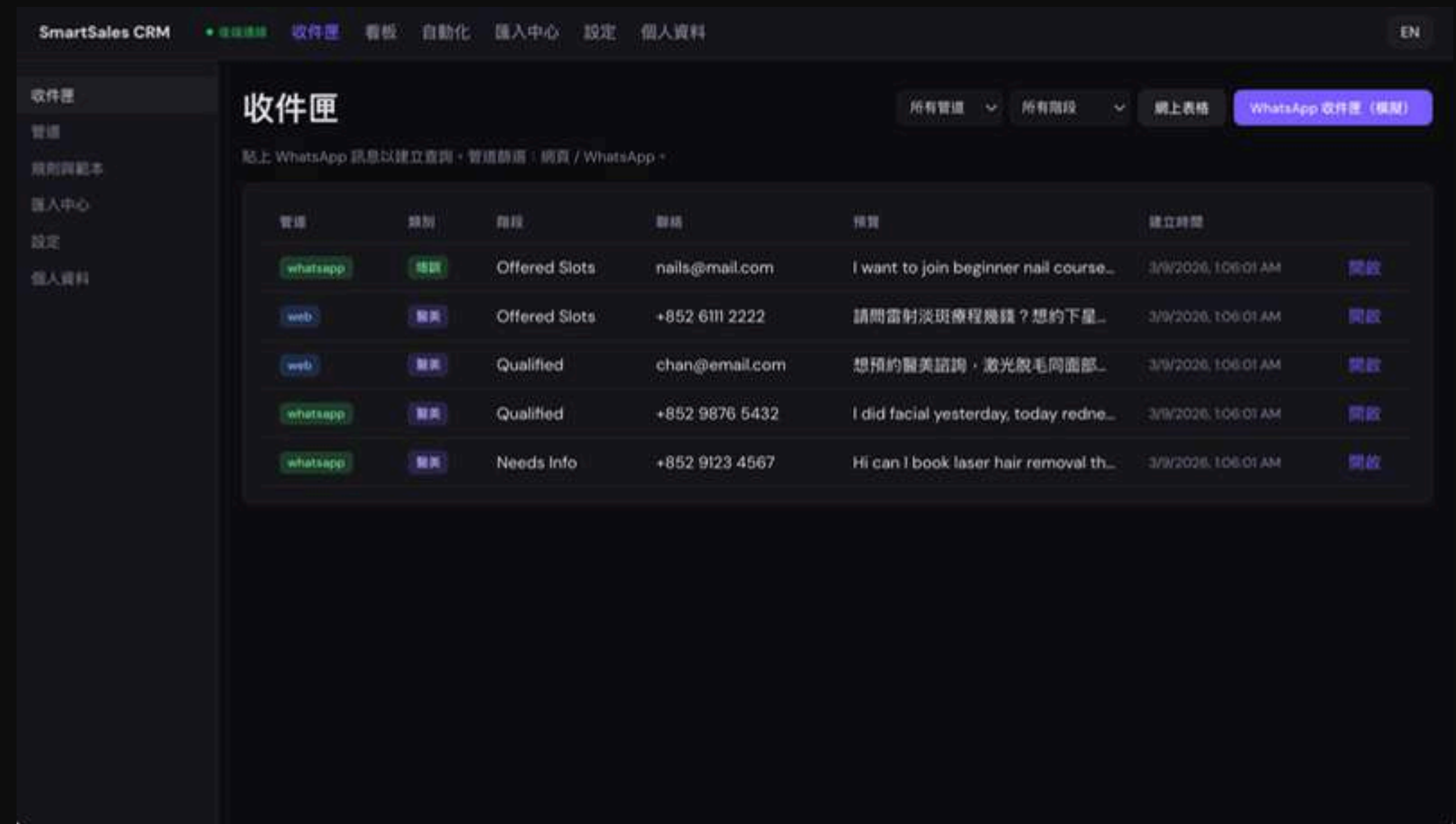
Stop losing leads to “seen” messages — every chat becomes a lead record.

Unified Inbox (selected channels)

Capture enquiries from selected channels into one lead record: source, contact, owner, stage, last touch.

Auto-tagging by keywords

Auto-label intent (price / booking / urgent / info) to help owners prioritize follow-ups.



SmartSales CRM

收件匣

管道	類別	階段	聯絡	預覽	建立時間	開啟
whatsapp	培訓	Offered Slots	nails@mail.com	I want to join beginner nail course...	3/9/2026, 10:06:01 AM	開啟
web	醫美	Offered Slots	+852 6111 2222	請問雷射淡斑療程幾錢? 想約下星...	3/9/2026, 10:06:01 AM	開啟
web	醫美	Qualified	chan@email.com	想預約醫美諮詢, 激光脫毛向面部...	3/9/2026, 10:06:01 AM	開啟
whatsapp	醫美	Qualified	+852 9876 5432	I did facial yesterday, today redne...	3/9/2026, 10:06:01 AM	開啟
whatsapp	醫美	Needs Info	+852 9123 4567	Hi can I book laser hair removal th...	3/9/2026, 10:06:01 AM	開啟

Sales Operations, Simplified

Never Let a Deal Slip Through the Cracks

Pipeline Management

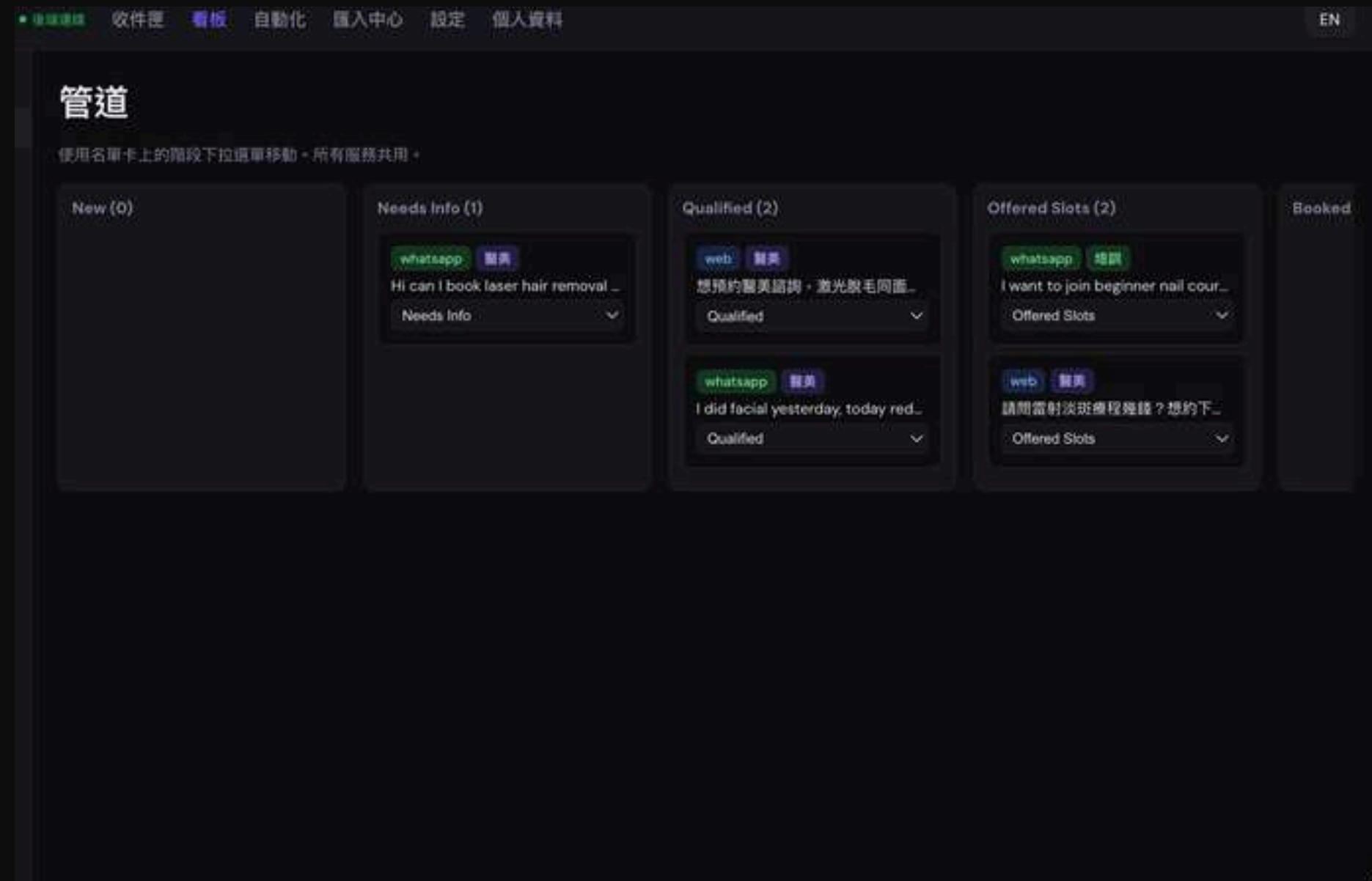
Kanban-style pipeline shows exactly where every deal sits—helps delegate follow-ups to teammates

AI Sales Assistant (AI Sales Agents)

Let AI draft replies, summarize long chat histories, and recommend next steps with consistent professionalism

Scalability & Access Control

Centralized lead timeline enables auditing and elevate service quality and SOP





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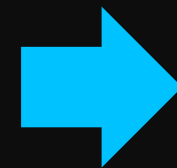
Onboarding Process

How We Get You Started

01

Scope Audit

Review your lead sources, response SLA, and current follow-up workflow.



02

Setup & Import

Configure pipeline stages + fields, connect channels (selected), import contacts/leads.



03

Team Onboarding

Set triage labels, reply templates, routing rules; train the team on daily usage with your dedicated AI agent

SmartSales CRM Pricing Plan – Setup Package Scope

Flexible setup today, scalable growth tomorrow.

Item	STARTER	GROWTH	ENTERPRISE
Omni-channel Inbox (selected)	✓	✓	✓
Pipeline & Lead Stages	✓	✓	✓
AI Triage & Reply Drafts	✓	✓	✓
SLA Rules + Follow-ups		✓	✓
Integrations (agreed scope)			✓

Channels & integrations are configured based on agreed scope.

SmartSales CRM Pricing Plan – Service Entitlements

Flexible setup today, scalable growth tomorrow.

Item	STARTER	GROWTH	ENTERPRISE
Monthly Reports and Tweaks	2 times	4 times	8 times
Strategic AI Consultancy	Not included	2 sessions / year	6 sessions / year
Warranty Support Period	6 months	1 year	1 year with consultancy
Review Meetings	1	2 / year	1 / quarter
Suitable Scenario	1 sales team	2 sales teams/ channels	Multi-team / multi-channel ops

Package includes initial content upload , up to maximum 3 revisions and basic warranty period support after go-to-live



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One-off Setup Pricing Plans

Starter

HKD 10,800

Hot Choice

Growth

HKD 18,880

Enterprise

Custom

Payment Terms

Setup Fee

100% upon commencement

Reminder

Pricing excludes 3rd-party platform fees (WorkBuddy, hosting, WhatsApp/WeChat providers, SIM/data plans, SMS, email sending, etc.).

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Monthly Support & Maintenance Plans

Prepayment Discounts

1 Year: 10% OFF

2 Years: 20% OFF

Hot Choice

Starter

HKD 880

- ✓ Ops support & data backups
- ✓ Support hours / month: 2
- ✓ Warranty: 6 months
- ✓ Support hours / month: 2
- ✓ Product review: 1 meeting

Growth

HKD 1,280

- ✓ Starter Maintenance Package
- ✓ Monthly health / usage summary
- ✓ Minor configuration & content tweaks
- ✓ Support hours / month: 4
- ✓ 2 Strategic Lead and AI Consultancy sessions per year

Enterprise

HKD 1,680

- ✓ Growth Maintenance Package
- ✓ Omnichat Automation support
- ✓ Quarterly optimization review
- ✓ Integration upkeep (agreed scope)
- ✓ Support hours / month: 6
- ✓ Integration upkeep (agreed scope)



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Automatic Referral Program & Welcome Gift

Grow your network while earning with InnovateXP.

25% Referral Commission

Receive 25% of first-year contract value for each successful referral (Honorary Sales Director scheme).

Feedback Loop Access

Join our beta feedback group to shape upcoming AI features.

Welcome Gift

100 premium name cards with your custom QR + Linktree setup (LinkedIn / WhatsApp / Instagram / WeChat).

How it works?

Refer a qualified lead

Lead signs contract and activates service

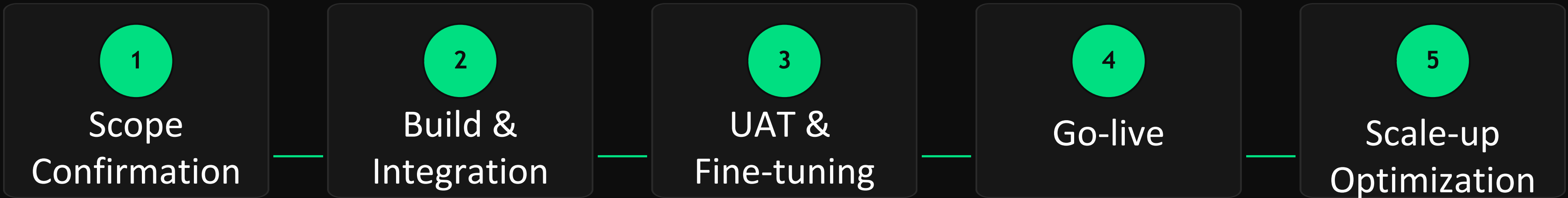
Commission is issued per agreement terms

Introduce your partner now!

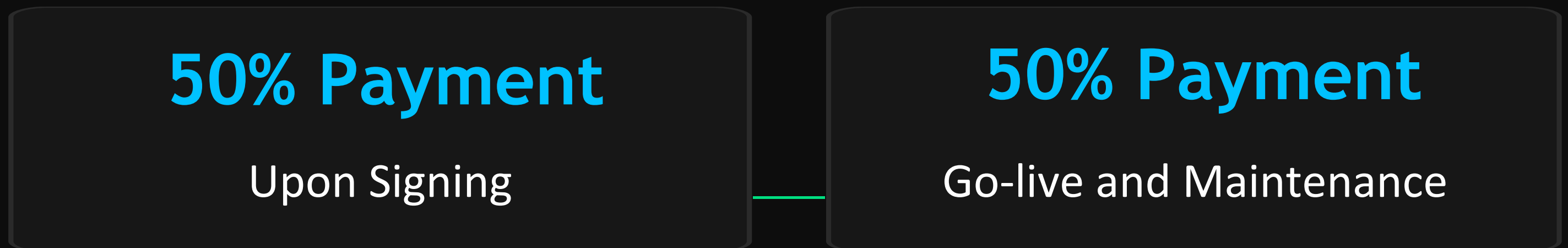
Contact

info@innovatexp.co

Delivery Plan & Next Step



Payment Schedule



Let's Launch Your AI Sales Engine

info@innovatexp.co