

AI-POWERED CRM FOR SMALL AND MEDIUM  
BUSINESSES

# Run your client conversations, bookings and follow-ups from one place.

TalkToClient CRM helps busy businesses answer faster, book more clients, reduce missed opportunities and manage customers without extra staff.

Phone

SMS

Email

Website Chat

WhatsApp

Instagram

Facebook

Telegram

**Start free at [talktoclient.com](https://talktoclient.com)**



**EXECUTIVE SUMMARY**

# Your AI front desk plus your customer management system.

TalkToClient CRM is made for businesses that depend on client communication, appointments, follow-ups and repeat customers.

It helps manage the full customer journey from the first message to the final invoice. When a new client contacts your business, TalkToClient CRM can answer questions, collect details, check availability, book an appointment, send reminders, save the conversation and help your team follow up.

**Less chasing. Faster replies. More bookings. Better customer experience.**

## Before TalkToClient CRM

- ✓ Missed calls and unread messages
- ✓ Calendar confusion and manual booking
- ✓ Client notes scattered across phones and inboxes
- ✓ Quotes and follow-ups forgotten
- ✓ Reviews and campaigns handled manually

## After TalkToClient CRM

- ✓ Messages, clients and bookings in one dashboard
- ✓ AI answers common questions and helps book
- ✓ Automatic reminders and follow-up tasks
- ✓ Pipeline, invoices, campaigns and reports organized
- ✓ Your team works with a clearer view of every client

## THE PROBLEM

# Most businesses do not lose clients because of bad service. They lose them because no one replied in time.

### What happens every day

- ✓ A customer calls while your team is busy.
- ✓ Someone messages after closing time.
- ✓ A lead asks for prices on Instagram.
- ✓ A client wants to reschedule by SMS.
- ✓ A quote is sent but no one follows up.
- ✓ A happy customer leaves without being asked for a review.

### What it costs

These small gaps quietly cost businesses money every month. For many small and medium businesses, the problem is not lack of demand. The problem is managing all the conversations, bookings, follow-ups and customer details without hiring more people.

Every missed message can become a missed booking.



#### Missed calls

Clients move on



#### Slow replies

Leads lose interest



#### No-shows

Time is wasted



#### Manual follow-up

Work gets delayed

TalkToClient CRM closes the gaps between inquiry, booking and follow-up.

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THE SOLUTION

# Keep your business responsive, organized and ready to book.

TalkToClient CRM helps your business respond to clients quickly, even when your team is busy, closed or away.

It brings customer messages, appointments, reminders, tasks, leads, deals, quotes, invoices, reviews, loyalty, documents and integrations into one dashboard.

## One dashboard for your team

- ✓ Inbox
- ✓ Clients
- ✓ Bookings
- ✓ Pipeline
- ✓ Tasks
- ✓ Invoices
- ✓ Campaigns
- ✓ Reviews
- ✓ Documents
- ✓ Reports



### Answer faster

AI helps answer routine questions and guide clients toward the next step.



### Book smarter

Bookings follow your hours, capacity, services and calendar availability.



### Grow better

Track leads, follow up, send campaigns, request reviews and reward loyal clients.

Your team gets a clear view of who asked, what was booked and what needs attention.

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AI ASSISTANT

# A helpful front desk for every customer message.

TalkToClient CRM can answer customer questions, ask the right follow-up questions and help clients book through the channels they already use.

 **Phone**

Real spoken conversations with 100+ language voice support

 **SMS**

Quick replies, confirmations and rescheduling

 **Email**

Warm, on-brand replies from your inbox

 **Website chat**

Instant answers while visitors are on your site

 **Social DMs**

Facebook, Instagram, WhatsApp and Telegram add-ons

 **AI Smart booking**

Offers substitute times when you are full

## Simple example

**Client:** "Are you open tomorrow?"

**TalkToClient CRM:** "Yes, we have availability tomorrow. Would you like morning or afternoon?"

**Client:** "Can I book at 2?"

**TalkToClient CRM:** checks availability and helps confirm the booking.

## CLIENT DATABASE

# Know every client without searching through old messages.

TalkToClient CRM stores client information in one clean place. Your team can see contact details, message history, appointments, notes, documents, invoices, reviews, loyalty points and future tasks.

This helps your team give a more personal and professional experience every time the client contacts you.

## Client profile example

- ✓ Name, phone and email
- ✓ Last conversation
- ✓ Next appointment
- ✓ Notes and preferences
- ✓ Quote and invoice status
- ✓ Loyalty points and rewards
- ✓ Documents and follow-up tasks

**| Your team does not need to ask the same questions again and again.**

Every client record becomes easier to understand and easier to serve.

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**APPOINTMENTS AND CALENDAR**

# Bookings handled automatically, without calendar chaos.

TalkToClient CRM helps customers book appointments and meetings based on your real hours, services, staff capacity and availability.

## Booking benefits

- ✓ Capacity-aware booking
- ✓ Google Calendar connection
- ✓ Gmail connection
- ✓ Google Meet links for online appointments
- ✓ Day-before reminders
- ✓ 3-hour reminders
- ✓ Rescheduling and cancellations
- ✓ Substitute time suggestions when full

## Example booking flow

Sarah wants a consultation on Friday. TalkToClient CRM checks the calendar. Friday at 2:00 pm is full, so it offers Friday at 3:30 pm or Saturday at 11:00 am. Sarah confirms. The booking is added to your calendar and reminders are scheduled.

**Sarah M.**

10:00 am - Confirmed

**James T.**

11:30 am - Confirmed

**Table for 4**

7:00 pm - Confirmed

Customers can book, reschedule or cancel without waiting for a staff member.

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## PIPELINE AND FOLLOW-UPS

# Turn inquiries into customers with clear follow-up tracking.

Many businesses lose sales because leads are not followed up properly. TalkToClient CRM helps you see where each opportunity stands and what should happen next.

### New inquiry

A potential client asks a question.

### Contacted

AI or staff replies quickly.

### Appointment booked

A time is confirmed.

### Quote sent

Follow-up task created.

### Follow-up benefits

- ✓ Never forget to call back
- ✓ Assign tasks to team members
- ✓ Track open opportunities
- ✓ Send automatic follow-up messages
- ✓ See leads needing attention
- ✓ Keep sales conversations organized

### Business impact

The more organized your follow-up becomes, the more opportunities your business can recover from missed calls, abandoned inquiries and delayed replies.

A simple pipeline helps your team know what to do next.

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**GROWTH TOOLKIT**

# More than appointments. A complete customer growth toolkit.

TalkToClient CRM helps you manage the business activities that happen after the first conversation.

## Quotes and invoices

Create and manage quotes and invoices so client records and payment-related communication stay organized.

## Campaigns

Send email and SMS updates, offers, reminders, announcements and reactivation messages.

## Reviews

Ask happy customers for reviews at the right time after a visit, purchase or completed service.

## Loyalty

Encourage repeat business with points, rewards and loyalty offers.

## Documents

Keep forms, files and shared client information inside a document vault and client portal.

## Admin and billing

Manage users, account settings, billing and business configuration in one place.

Designed for day-to-day customer operations and long-term client growth.

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## CHANNELS AND INTEGRATIONS

# Connect the tools and channels your business already uses.

TalkToClient CRM is built to meet customers where they already are, while helping your team avoid switching between too many apps.

### Communication channels

Phone

SMS

Email

Website chatbot

Facebook Messenger

Instagram DMs

WhatsApp Business

Telegram

### Business tools

Google Calendar

Gmail

Google Meet

HubSpot-style CRM

Salesforce-style CRM

Pipedrive-style CRM

Zoho-style CRM

Shopify-style systems

Zapier / Make-style automations

### Optional add-ons

Social and messaging channels can be added based on your business needs. They are useful when customers already ask questions through Facebook, Instagram, WhatsApp or Telegram.

A DAY IN THE LIFE

## A normal business day with TalkToClient CRM.

**8:15 am**

A customer sends a website chat asking about availability. TalkToClient CRM answers and helps them book.

**9:30 am**

A client calls while staff are busy. The AI assistant answers, checks availability and offers the next open slot.

**11:00 am**

A new Instagram inquiry asks about pricing. The conversation is saved as a new lead.

**1:00 pm**

A returning client receives an automatic reminder for tomorrow's appointment.

**2:30 pm**

A quote is sent to a potential customer and a follow-up task is created.

**6:45 pm**

A customer messages after closing. TalkToClient CRM replies, collects details and books them for the next available day.

**| Your business keeps moving, even when your team is busy serving customers.**

USE CASES

## Built for any business that works with clients.

### Salons and spas

Book appointments, send reminders, reduce no-shows and promote offers.

### Clinics and wellness

Handle appointment requests, confirmations, reminders and client records.

### Consultants and agencies

Track leads, schedule calls, send proposals and follow up.

### Restaurants and cafes

Answer booking questions, confirm reservations and reply after hours.

### Repair and local services

Collect requests, schedule visits, send quotes and track jobs.

### Fitness studios

Book classes, manage reminders, promote memberships and reward clients.

### Real estate teams

Capture leads, schedule viewings and manage follow-up.

### Tutors and training studios

Book lessons, manage student inquiries and run campaign messages.

Also useful for law offices, home services, photographers, agencies and more.

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WHY IT IS DIFFERENT

## A normal CRM stores information. TalkToClient CRM helps you act on it.

### Normal CRM

- ✓ Stores contacts
- ✓ Requires manual updates
- ✓ Team must reply manually
- ✓ Bookings often need separate tools
- ✓ Follow-ups are easy to forget
- ✓ Messages are spread across channels
- ✓ Often feels complex for small businesses

### TalkToClient CRM

- ✓ Answers customer questions
- ✓ Helps book appointments
- ✓ Tracks conversations automatically
- ✓ Sends reminders and follow-ups
- ✓ Connects phone, SMS, email, chat and social messaging
- ✓ Keeps clients, bookings, invoices, campaigns and tasks together
- ✓ Built for busy business owners

Not just a place to store customer data. A working assistant that helps your business respond, book, follow up and grow.

**TRUST AND CONTROL**

# You stay in control. Your business stays organized.

TalkToClient CRM is designed to support your business, not replace your judgment.

## You control

- ✓ Services and availability
- ✓ Business hours and capacity
- ✓ Tone of voice and brand settings
- ✓ Channels and integrations
- ✓ Team users and admin settings
- ✓ Billing and plan changes

## Information organized

Client information should be treated carefully. TalkToClient CRM helps keep customer records, conversations, appointments and documents organized in one controlled system instead of scattered across phones, inboxes, notebooks and spreadsheets.

## Simple security message

Your business profile guides how the assistant responds. Your calendar guides booking decisions. Your team can review client records, conversations and follow-ups in one place.

Control, clarity and consistency for your customer operations.

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PRICING PLACEHOLDER

# Simple pricing that grows with your business.

Start simple, then upgrade as your client volume and business needs grow.

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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div>Free Trial</div> <div>\$0</div> <div>No card needed</div> <div><div>✓</div>Limited monthly client volume</div> <div><div>✓</div>Email booking and AI replies</div> <div><div>✓</div>Website chat widget</div> <div><div>✓</div>Calendar sync</div> <div><div>✓</div>Day-before and 3-hour reminders</div> | <div>Starter</div> <div>\$50</div> <div>CAD/month</div> <div><div>✓</div>Core CRM</div> <div><div>✓</div>Bookings</div> <div><div>✓</div>Reminders</div> <div><div>✓</div>Essential communication features</div> | <div>Most popular</div> <div>\$100</div> <div>Growth, CAD/month</div> <div><div>✓</div>More automation</div> <div><div>✓</div>Custom branding and tone</div> <div><div>✓</div>Priority email support</div> <div><div>✓</div>Team notifications</div> | <div>Scale</div> <div>\$180</div> <div>CAD/month</div> <div><div>✓</div>High volume</div> <div><div>✓</div>Dedicated onboarding call</div> <div><div>✓</div>Priority support</div> <div><div>✓</div>Room to grow</div> |
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**Publishing note:** Pricing, limits, taxes and add-ons should be confirmed on [talktoclient.com](https://talktoclient.com) before final public release.

Monthly billing. No heavy setup. No long-term complexity.

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FAQ

## Questions business owners usually ask.

### What is TalkToClient CRM?

An AI-powered client management platform for messages, bookings, reminders, leads, follow-ups, invoices, campaigns, reviews and client records.

### Do I need technical skills?

No. Add your business profile, hours, services and channels, then connect the tools you use.

### Can it answer phone calls?

Yes. It can support AI voice answering on paid plans or as an add-on depending on setup.

### Does it work with website chat?

Yes. A website chat widget can help visitors ask questions and start bookings directly from your site.

### Can it support multiple languages?

Yes. Voice calls can support 100+ languages, helping businesses serve multilingual customers.

### Is this only for large companies?

No. It is built for small and medium businesses that want professional client management without enterprise complexity.

Have a specific workflow? Start with the free trial or book a demo.

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MULTILINGUAL POSITIONING

## Speak to business owners in the language they understand.

The same brochure can be adapted into English, Hindi, Punjabi, French, Filipino and Urdu while keeping the message simple.

ENGLISH

### Your front desk, always answered.

TalkToClient CRM helps your business answer faster, book more clients and manage customers from one place.

HINDI

### आपका फ्रंट डेस्क, हमेशा जवाब देने के लिए तैयार।

TalkToClient CRM आपके बिजनेस को तेजी से जवाब देने, ज्यादा बुकिंग लेने और ग्राहकों को एक जगह मैनेज करने में मदद करता है।

PUNJABI

### ਤੁਹਾਡਾ ਫਰੰਟ ਡੈਸਕ, ਹਮੇਸ਼ਾ ਜਵਾਬ ਦੇਣ ਲਈ ਤਿਆਰ।

TalkToClient CRM ਤੁਹਾਡੇ ਬਿਜਨਸ ਨੂੰ ਤੇਜ਼ ਜਵਾਬ ਦੇਣ, ਹੋਰ ਬੁਕਿੰਗਾਂ ਲੈਣ ਅਤੇ ਗਾਹਕਾਂ ਨੂੰ ਇੱਕ ਥਾਂ ਸੰਭਾਲਣ ਵਿੱਚ ਮਦਦ ਕਰਦਾ ਹੈ।

FRENCH

### Votre réception, toujours prête à répondre.

TalkToClient CRM aide votre entreprise à répondre plus vite, réserver plus de clients et gérer les clients depuis un seul endroit.

FILIPINO

### Ang iyong front desk, laging handang sumagot.

Tinutulungan ng TalkToClient CRM ang iyong negosyo na sumagot nang mas mabilis, makakuha ng mas maraming booking at pamahalaan ang mga kliyente sa iisang lugar.

URDU

### آپ کا فرنٹ ڈیسک، ہمیشہ جواب دینے کے لیے تیار۔

TalkToClient CRM آپ کے کاروبار کو تیزی سے جواب دینے، زیادہ بکنگ حاصل کرنے اور کلائنٹس کو ایک جگہ منظم کرنے میں مدد دیتا ہے۔

CALL TO ACTION

## Stop losing clients in missed calls, unread messages and forgotten follow-ups.

TalkToClient CRM helps your business answer faster, book more appointments, manage customers and stay organized from one simple platform.

Whether you run a salon, clinic, restaurant, agency, repair service, fitness studio, consulting firm, real estate team or local service business, TalkToClient CRM helps your team save time and give every client a better experience.

**Start your free trial**

**Book a demo**

Visit [talktoclient.com](https://talktoclient.com)



Scan to open the website

**Every client answered. Every booking handled. Every follow-up remembered.**

### Back cover copy

TalkToClient CRM gives small and medium businesses a simple way to manage customer communication, appointments, leads, tasks, invoices, campaigns, reviews, loyalty and client records. It helps your business stay responsive during busy hours, after closing and when your team is focused on serving customers.