CINCH CRM · SALES & ACCOUNT MANAGEMENT

Win the deal.
Grow the relationship.

Sales is stronger when it understands service. Cinch brings pipeline activity, customer relationships and delivery context together, helping MSPs and CSPs focus their effort and lead more informed account conversations.

Pipeline clarity
Value, closing deals and risk signals in view.

Relevant follow-up
Luca drafts. You review and send.

Account visibility
People, projects and services behind the deal.

THE SINGLE SOURCE OF TRUTH

Sell with context. Lead with confidence.

Know the people, the opportunity and the services behind the account. Bring sales and service teams into a shared customer picture before the next decision.

Focus on the deals that need you

See pipeline value, closing opportunities and recommended next actions in the Sales Command Center.

Make follow-through easier

Use Luca to draft relevant re-engagement and deal-progression messages, then review and send.

Bring service context to growth

Use account, coverage and workbook records to make renewal and expansion conversations more informed.

Move from quote to commitment

Build opportunity-linked quotes, work through approval and convert selected quotes into contracts and projects.

AI that helps your team act.

Luca helps turn deal context into a useful first draft. Your team brings the judgment, owns the relationship and decides what happens next.

GIVE EVERY OPPORTUNITY A NEXT STEP

Turn customer context into momentum.

Bring focus to new deals, continuity to relationships and more substance to your growth conversations.

01

PIPELINE PRIORITIES

Know where to spend your time.

The Sales Command Center brings pipeline value, closing deals, quotes sent and risk signals into view. Filter by salesperson or closing month, and use the stage funnel to focus the conversation.

02

AI-ASSISTED SALES

Spot the stall. Find the next move.

Where AI insights are enabled, Cinch reviews deal stage, value, close date and activity to highlight risk and recommend next actions. Built-in rule-based recommendations remain available when AI is unavailable.

03

RELATIONSHIP FOLLOW-THROUGH

Make the next message count.

Use Luca's re-engagement and deal-progression playbooks to draft a relevant follow-up. Refine the tone, length or call to action, then review and send the message yourself.

04

QUOTES & APPROVALS

Move from interest to a clear commitment.

Create opportunity-linked quotes for managed services, professional services, subscriptions and equipment. Submit orders for approval, convert quotes into contracts and create delivery projects where configured.

05

ACCOUNT ALIGNMENT

Give every team the customer picture.

Keep account owners, sponsors and technical contacts visible alongside notes, conversations, opportunities, contracts, projects and open tickets.

06

SERVICE & COMMERCIAL CONTEXT

Understand what the customer has.

Review services, scope, status, consumption and coverage notes in the Service Matrix. Keep contracts and rate cards close, with synced invoice visibility.

CONNECTED TO YOUR STACK

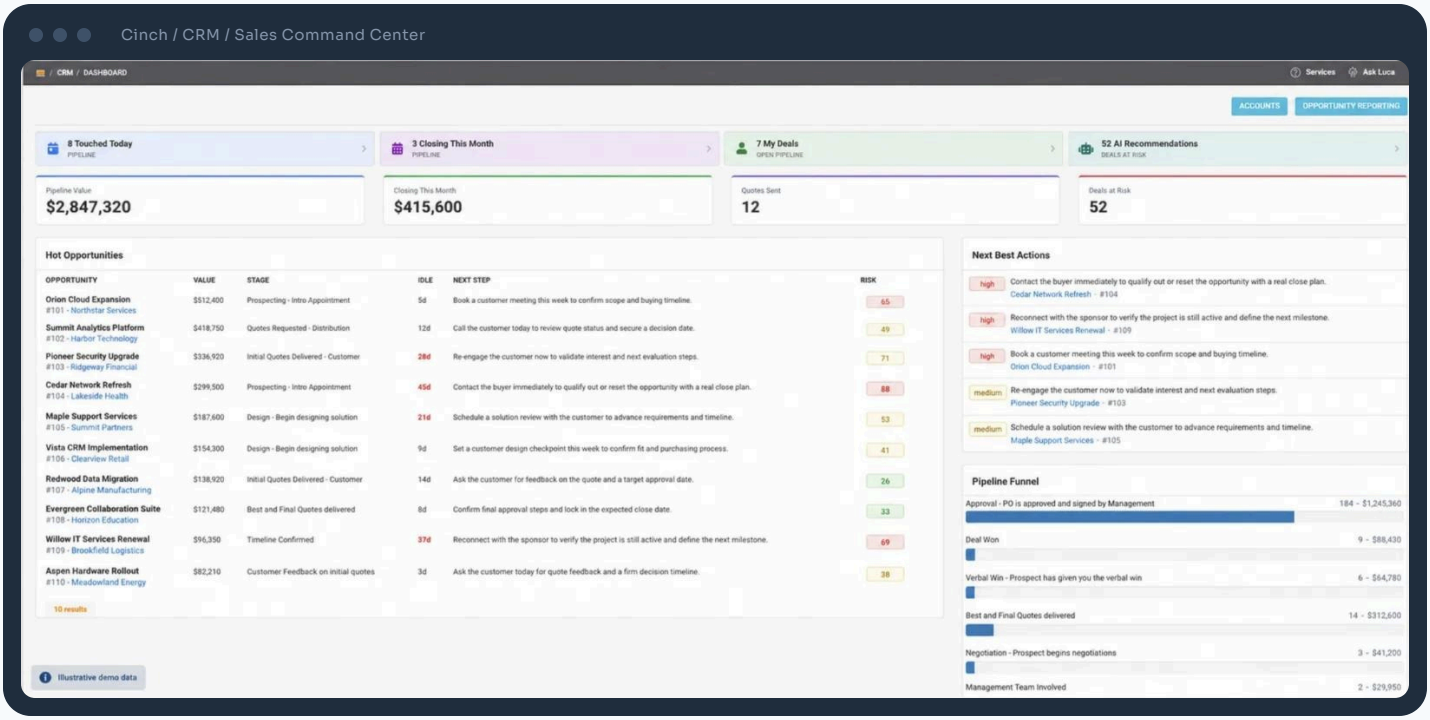
Your tools. Working together.

Microsoft | Veeam | VMware | N-able | XCP-ng | Zerto | Zoho | Salesforce

A MORE FOCUSED SALES DAY

See the priorities. Keep the conversation moving.

Use the Sales Command Center to identify where attention is needed, then move into the opportunity with customer context already close at hand.



Sales Command Center · sanitized illustration with fictional demo data.

Bring evidence to every account review.

PREPARE WITH CONTEXT

Start with the full relationship.

Review open tickets, current projects, contracted services and customer contacts before the meeting, grounded in the work your team delivers.

DISCUSS WHAT COMES NEXT

Turn technical details into priorities.

Use workbook warranty dates, license renewals and certificate expirations to inform refresh and renewal discussions. Capture the opportunity so it has an owner.

CONNECT THE COMMITMENT

Carry the conversation into delivery.

Develop the quote, work through approval and coordinate the project in PSA, with sales context and delivery progress accessible from the account.

BUILT BY AN MSP. DESIGNED FOR THE MSP.

Built around service-provider relationships.

Explore how Cinch connects your sales pipeline to the customers and services behind it.

Getting started is simple

01 Start free
Create your account and explore Cinch at your own pace. Free for up to 5 provider users, with no credit card required.

02 Watch the demo
See how Cinch CRM works alongside the rest of the connected Cinch platform.

03 Learn the platform
Use the Cinch user guides and walkthroughs for module overviews, workflows and setup.

04 Grow with your team
Choose the provider-user capacity you need as you grow. Schedule a meeting to talk through your service model.

EVERY PLAN INCLUDES

- The full Cinch platform
- Luca and Cinch AI tokens
- Support included
- Customer end users free

CRM, in practice

How does Cinch connect sales and service?
The customer account brings opportunities and contracts together with projects, open tickets and service coverage, so sales and delivery teams work from the same account context.

Does Luca send follow-up emails automatically?
No. Luca drafts and refines messages in the editor. Your team reviews, saves or sends them through the normal workflow, keeping control of the customer communication.

How can Cinch support account and renewal reviews?
Use account activity, contracts, service coverage and workbook dates to prepare the discussion. Opportunities can be marked as renewals, then tracked through stages and quote approval.

ONE PLATFORM · SIX CONNECTED MODULES

Desk	CRM	PSA	Workbooks	Cloud	Business Operations
Service delivery & devices	Sales & account growth	Projects, time & capacity	IT documentation & assets	Provisioning & operations	Shifts, effort & reporting

Make the next customer conversation matter.

Connect your pipeline to the people, projects and services behind every account.

Start Free →

(484) 679-2324 support@cinchsoftware.io

Free for up to 5 provider users · No credit card required · Customer end users are always free. Doylestown, Pennsylvania · AICPA SOC · Member, MSP Association of America.