

CUSTOMER RELATIONSHIP INTELLIGENCE

Reps never log it. Pipelines lie. The CRM that fills itself.

One AI-native CRM & operations platform that runs entirely inside Microsoft 365 — auto-capturing every email, meeting and Teams call so relationship intelligence, churn risk and forecast confidence surface *without a rep typing a thing.*

- Wave 2 · Available
- Zero manual activity logging
- In your tenant
- Per-tenant - no per-seat fees

SALES PIPELINE - LIVE

Nedbank — Expansion

Stage 'Proposal' · R1.8m · engagement steady, deal moving

ON TRACK

Sanlam — New Business

Deal Health: champion silent 18 days → stall likely

AT RISK

Discovery Health — Renewal

Forecaster: Stage 'Commit', R2.4m - no activity 21 days; slip forecast

GREEN

The AI reads the actuals, not the stage. **The third deal is 'Commit' today** - and forecast to slip before the rep changes the stage.

THE GAP TODAY

Your customer truth is scattered across six tools — and nobody's logging it anyway.

- Nobody logs activity

Traditional CRMs depend on reps logging every email and call. They never do. Pipeline reports lie; forecasts become fiction.
- Scattered signal

Emails in Outlook, chats in Teams, deals in Excel, contracts in SharePoint, tickets in the help-desk. No-one has the full picture.
- Ungoverned data

Customer PII, deal values and contract terms sit inside third-party CRM SaaS databases your IT team can't see, govern or secure.

DWx CRM IQ replaces the sprawl with one CRM that runs inside Microsoft 365 — and **fills itself**. Microsoft Graph captures the signal; Azure OpenAI extracts the meaning. The engines advise; your people decide.

THE DIFFERENCE

Ten agentic AI engines. Sales, service, revenue ops.

Every engine runs Azure OpenAI GPT-4o via Azure Functions — personal data stripped before any prompt is built. The six flagship engines are below; plus Lead Qualification, Email Generation, Case Deflection and Pipeline Hygiene. Humans always make the final call.

- Relationship Summarisation

Distils 30/90/180 days of emails, meetings and calls per account into a one-paragraph briefing — topics, sentiment, deals in flight, open commitments.
- Next-Best-Action

Reads deal stage, engagement trend, competitor signals and similar won deals to surface the single most impactful next step per deal — refreshed daily.
- Churn Risk Modelling

Composite health score from case-volume trend, SLA breaches, engagement frequency and sentiment drift. Alerts customer success the moment risk spikes.
- Conversational Recall

"What did we discuss with Acme last quarter?" Natural-language queries grounded on your tenant's own activity log — answered inside Teams.
- Forecast Prediction

Predicts likely close dates and outcomes per deal with confidence intervals, comparing live pipeline behaviour against historical won/lost patterns.
- Deal Health Scoring

ADVISORY

Per-deal score 0–100 from days-in-stage, response rates, meeting cadence and stakeholder breadth. A drop > 15 points in 7 days triggers a Teams alert.

THE PLATFORM

Everything you need to own every customer relationship — in one place.

- ✓ 360° Customer View

— every deal, case & conversation in one timeline
- ✓ Zero-Data-Entry Capture

— Microsoft Graph, every 30 minutes
- ✓ AI Relationship Summarisation

— 30/90/180-day executive briefings
- ✓ Pipeline & Deal Intelligence

— Kanban, forecast & per-deal health scores
- ✓ Next-Best-Action

— one prioritised step per deal, daily
- ✓ Churn Risk & Health Scoring

— real-time, with the drivers explained
- ✓ Conversational AI Recall

— natural language, inside Teams
- ✓ Relationship Heat Map

— interaction strength per contact
- ✓ Buying Committee Mapping

— roles inferred from comms
- ✓ Cases, Tickets & SLA Monitoring

— with AI case deflection
- ✓ Service Command Centre

— live case queue & SLA countdown
- ✓ Sales Ops & Pipeline Hygiene

— RevOps forecast confidence per rep

WHY DWX

What third-party CRM SaaS can't do.

Compared with the CRM tools most teams bolt on around Microsoft 365 — Salesforce, HubSpot, Pipedrive, Zoho.

Capability	DWx CRM IQ	Third-party CRM SaaS
Runs inside your Microsoft 365 tenant (SPO + Teams)	Yes	No
Zero manual activity logging — auto-capture via Graph	Yes	No
Customer data stays in your tenant & Azure subscription	Yes	No
AI grounded on your own M365 communications	Yes	No
Priced per tenant — no per-seat SaaS fees	Yes	No
Relationship heat map & buying committee from real comms	Yes	No

THE ROI CASE

Measurable impact from day one.

Fuller pipeline data, better forecasts and lower churn — plus hours back every week because nobody's logging activity by hand.

- 5+↑

Hours saved per rep, per week

Zero-data-entry capture replaces manual CRM logging — reps sell, agents resolve, RevOps forecasts.
- 0

Manual activity logging

Microsoft Graph auto-captures every email, meeting and Teams call — attached to the right account.
- 360°

Customer view

Every deal, conversation, contract, case and ticket in one chronological timeline.
- 100%

Data sovereignty

All customer data stays in your M365 tenant and Azure subscription — you remain the data controller.

WHO IT'S FOR

A tailored view for every seat at the table.

- ACCOUNT MANAGER

Walk in knowing everything

"I'm in a meeting with Nedbank in 20 minutes. Tell me what we last spoke about, who's involved, what's open, and what to push next."
- BUSINESS DEVELOPMENT MANAGER

Know which deals are really moving

"I have 30 deals in pipeline. Which ones are actually moving, which are stalling, and who do I escalate to today?"
- CUSTOMER SUCCESS LEAD

See churn before they shop around

"I want to know the moment an account's health drops — before they tell me they're shopping around. And I want to know why."

ENTERPRISE-GRADE · MICROSOFT-NATIVE

It runs in your tenant. Microsoft bills you directly.

Built on Azure OpenAI (GPT-4o) with no black-box dependencies and no data lock-in. CRM IQ runs in your Azure subscription in South Africa North — customer data never leaves your environment, and you remain the data controller. POPIA & GDPR by design: email bodies, call recordings and chat messages are never stored — metadata only.

Azure paid direct to Microsoft. First Digital does not mark up Azure.

Azure OpenAI · GPT-4o

Microsoft Graph

SharePoint Online

Microsoft Teams

Azure Functions · Azure SQL

SPFX · React · Fluent UI

DWx Guardian Licensing

Per tenant

LICENCE SIZED BY M365 USER BAND
NO PER-SEAT FEES

Be first to the CRM that fills itself.

DWx CRM IQ is live in Wave 2. Book a demo — see the CRM that fills itself, get priority deployment, and watch it fill your pipeline from your own M365 signal.

Book a demo →