ROUND INFINITY

FOR SALES LEADERS, ACCOUNT EXECUTIVES AND DEAL DESKS

Move your sales execution to agentic.

AI agents coach every deal, capture every call, price every quote by policy and turn every signature into an order. Your sellers spend their time with customers.

01 **Shorter sales cycle**

02 **Protected margin**

03 **Opportunity to cash, connected**



Round Infinity, Inc.

From manual to agentic.

TODAY		WITH ROUND INFINITY
Deals stall with no next step	→	Every deal reviewed daily for risk, with suggested actions
Call notes never reach the CRM	→	Needs, objections and next steps captured automatically
Discounts promised, then approved	→	Pricing rules applied before any quote goes out
Signed deals re-keyed into orders	→	Signature becomes order and invoice without re-keying



One deal, discovery to renewal.

Sales Execution in five steps. An app holds the work, an AI agent does it, and people decide where it matters.

01 ADVANCE

Move every deal forward with clear next steps

AI AGENT

Opportunity Coach · Forecast

Flags deal risks and explains forecast changes.

APP Pipeline & Opportunities

PEOPLE Sellers act on the next step.

→

02 DISCOVER

Capture needs and configure the right offer

AI AGENT

Meeting Notes

Summarizes every call into needs, objections and next steps.

APP Product Catalog

PEOPLE Sellers confirm the opportunity.

→

03 QUOTE

Build quotes and approve discounts by policy

AI AGENT

Proposal & Pricing

Drafts quotes from the price book; flags discounts for approval.

APP Configure, Price, Quote · Proposals

PEOPLE Deal desk approves exceptions.

→

04 CONTRACT

Draft, negotiate and sign contracts

AI AGENT

Contract Review

Compares redlines with your terms and suggests fallbacks.

APP Contracts & E-signature

PEOPLE Legal approves non-standard terms.

→

05 ORDER & RENEW

Turn signed deals into orders, cash and renewals

AI AGENT

Renewal

Creates the order and spots renewals and expansion.

APP Renewals & Subscriptions

PEOPLE Account teams own the renewal.

03 QUALIFY

Every deal, coached.

The Opportunity Coach reads each deal's activity and emails, flags what is missing and suggests the next action, so forecasts reflect what is really happening.

- Stage and activity
- Stakeholders
- Risks
- Forecast change
- Suggested next action

POWERED BY

USE CASE — Pipeline & Opportunities · Opportunity Coach

+ WORKS WITH — Prospecting

PREPARED BY AI AGENT

Illustrative

Deal review · Halden Logistics

Proposal stage · $180K · close date in 21 days

ACTIVITY	Last reply 9 days ago; proposal opened 4 times
STAKEHOLDERS	COO not yet engaged; signs above $150K
RISK	No next meeting booked
FORECAST	Probability down from 60% to 40%

SUGGESTED NEXT ACTION

Ask the VP Operations for a 30-minute COO review

Send the TMS integration note they asked about

Six sales agents. Each with a partner.

AGENT 01

Opportunity Coach

Flags deal risks such as no next step and suggests actions.

+ Prospecting

AGENT 02

Meeting Notes

Summarizes calls into needs, objections and next steps.

+ Appointment Scheduling

AGENT 03

Proposal & Pricing

Drafts quotes from the price book and flags approvals.

+ Build Your Own

AGENT 04

Contract Review

Compares redlines with your terms; suggests fallback wording.

+ Legal Operations

AGENT 05

Forecast

Predicts close probability and explains forecast changes.

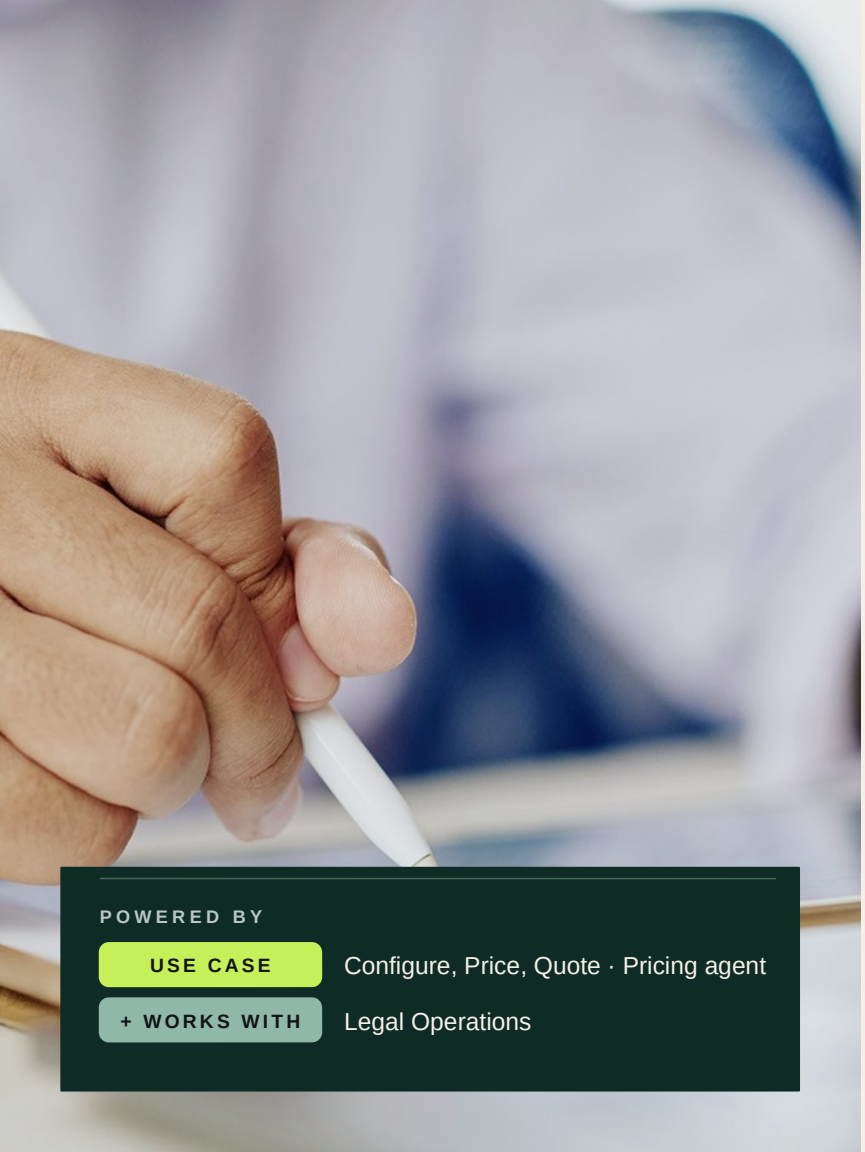
+ Financial Close

AGENT 06

Renewal

Spots renewals and expansion from usage; drafts outreach.

+ PO to Cash



POWERED BY

USE CASE — Configure, Price, Quote · Pricing agent

+ WORKS WITH — Legal Operations

05 QUOTE & CONTRACT

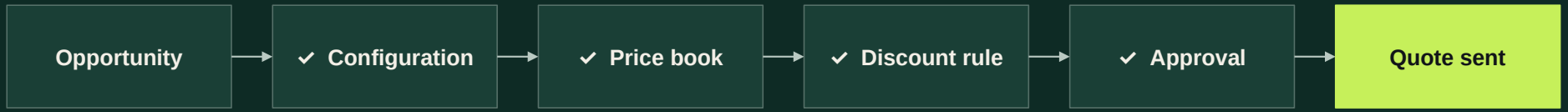
Quote to signature, in the open.

The quote follows the rules, the contract follows your terms, and the order follows the signature.

ACTIVITY · HALDEN LOGISTICS · $180K — *Illustrative*

Mon	AGENT	Quote drafted from price book · 3 sites, 2 years
Mon	AGENT	18% discount above rep limit · sent for approval
Mon	DEAL DESK	Approved 15% with a 3-year term
Wed	AGENT	Customer redlines compared · 2 deviations
Wed	AGENT	Fallback wording suggested for liability cap
Fri	CUSTOMER	Signed electronically
Fri	AGENT	Order and first invoice created · renewal date set

Margin protected before anything is promised.



Discounts

Discounts are checked against thresholds by role and margin. Anything outside the rules goes to the right approver before the quote goes out.

POWERED BY

USE CASE — Configure, Price, Quote · Pricing agent

+ WORKS WITH — Build Your Own

Terms

Customer redlines are compared with your standard terms. Deviations are highlighted with fallback wording, and non-standard terms go to legal.

POWERED BY

USE CASE — Contracts & E-signature · Contract agent

+ WORKS WITH — Legal Operations

07 THE USE CASE

Six applications, built for selling.

Pipeline & Opportunities
Deals, stages, forecasts, next steps

Product Catalog
Products, bundles, price books

Configure, Price, Quote
Quotes, options, discount rules

Proposals
Branded, generated from the deal

Contracts & E-signature
Templates, redlines, signatures

Renewals & Subscriptions
Dates, terms, expansion



Works with the rest of your operation.

Connected use cases share the record and the audit trail. Industry packs add sector depth on top.

WORKS WITH

Prospecting

Qualified meetings arrive with full history.

WORKS WITH

PO to Cash

Signed deals become orders and cash.

WORKS WITH

Legal Operations

Non-standard terms reviewed and tracked.

WORKS WITH

Accounts Receivable

Collections and credit visible to the account team.

INDUSTRY PACKS

Insurance

Broker, agent and policy sales.

INDUSTRY PACKS

Automotive Retail

Vehicle deals, finance and trade-ins.

INDUSTRY PACKS

Mortgage Lending

Applications from enquiry to offer.

INDUSTRY PACKS

Real Estate Development

Unit bookings and agreements.

Tracked from request to done.

WORKFLOWS

Discount approval	Thresholds by role and margin
Quote to contract	No re-keying
Renewal and expansion	Started before expiry
Deal desk review	Non-standard terms approved
Win/loss capture	Reasons recorded
Order hand-off	Signature to order and invoice

DASHBOARDS



Pipeline and forecast

By stage, owner, close date



Win rate and cycle time

By segment and product



Discount and margin

By rep and deal

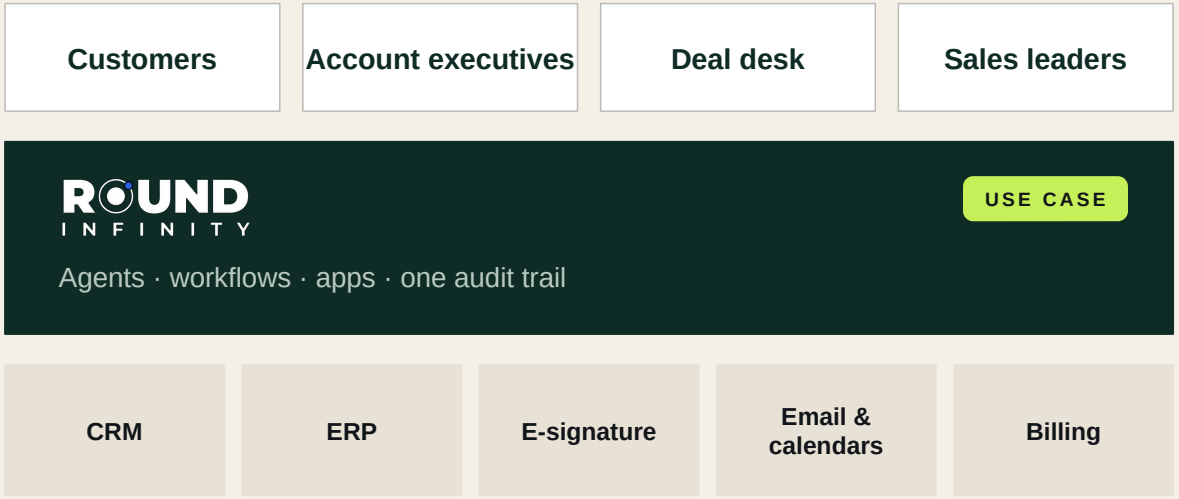


Renewal rate

Gross and net retention

Works alongside your CRM and ERP.

Accounts stay in your CRM and orders in your ERP. Round Infinity runs coaching, quoting, contracts and renewals around them.



Your systems of record stay where they are

INCLUDED WITH EVERY SUBSCRIPTION

- AI Execution Engine
- AI Agent Builder
- Workflow Automation
- Customer 360
- Apps & Portals
- Integrations & APIs

Start with one use case. Add the rest.

Platform

Named users and the core platform

+

Sales Execution

The apps, agents, workflows and dashboards in this overview

+

More use cases

Prospecting · PO to Cash · Legal Operations

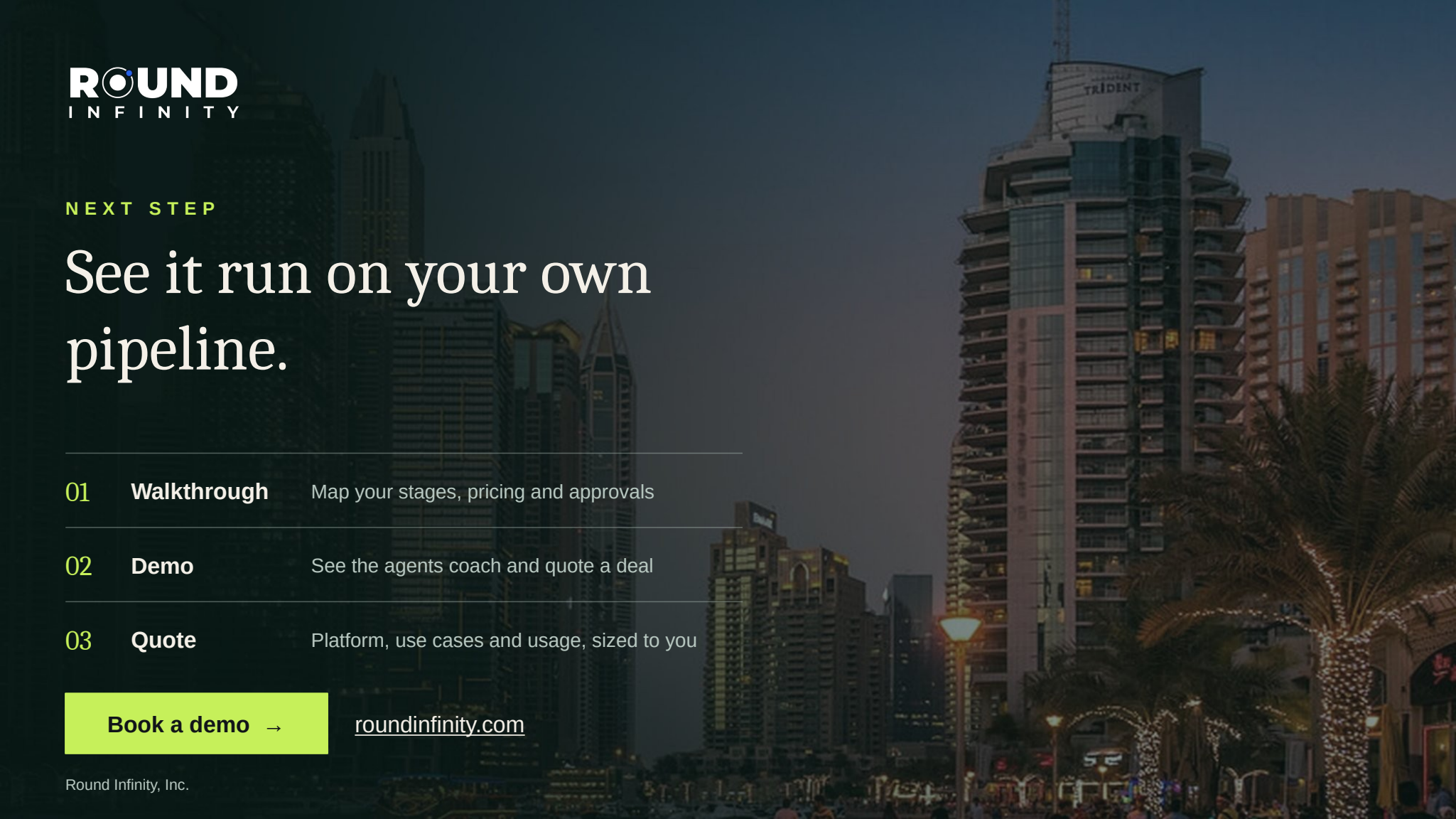
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Usage

AI, voice and messaging — pay as you use

One platform, one data model, one user set, one audit trail. Every use case you add shares all of it. Users are licensed once.

Price your operation → roundinfinity.com/pricing



ROUND INFINITY

NEXT STEP

See it run on your own pipeline.

01	**Walkthrough**	Map your stages, pricing and approvals
02	**Demo**	See the agents coach and quote a deal
03	**Quote**	Platform, use cases and usage, sized to you

Book a demo →

roundinfinity.com

Round Infinity, Inc.