FLYCAST PARTNERS

monday CRM

A unified platform to manage your entire sales motion.

Speed up your sales cycle with an intuitive CRM that connects pipeline, communication, and customer data.

- Full Visibility Across Sales Pipelines
- Centralized Customer Data & Activity
- Structured Lead & Deal Processes
- Built-In Collaboration Features
- AI & Workflow Automation
- Revenue Reporting & Forecasting

The end of disconnected sales tools

One Platform

For all Your CRM needs

Manage leads, contacts, accounts, and deals in one connected platform, giving teams across the enterprise a shared customer view while supporting coordinated collaboration across sales, marketing, and customer success teams.

Centralized

Customer data in one place

Bring all customer records into a single system and connect them through integrations, dashboards, and permissions, giving teams consistent visibility into pipeline activity, account history, performance trends, and organization-wide sales activities.

Unified and Consistent

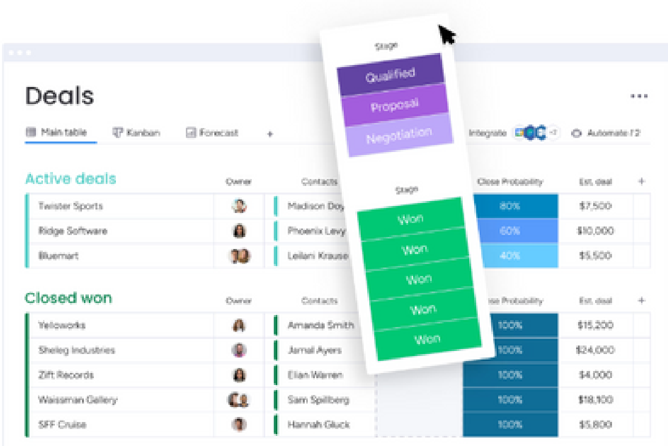
Sales structure

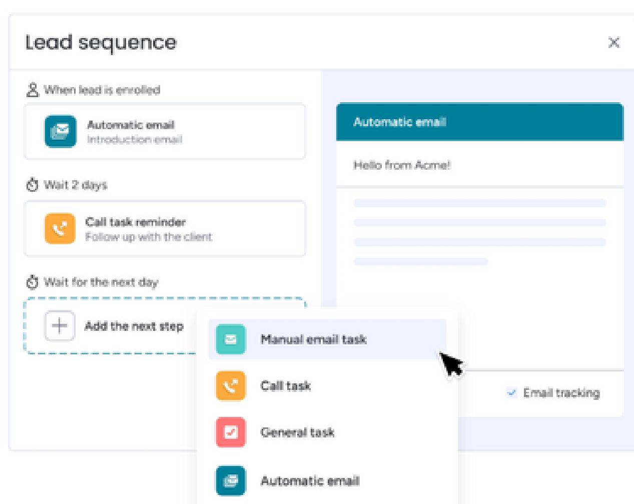
Support pipelines, account management, renewals, and expansions using consistent CRM structures that help teams scale revenue operations, improve visibility, maintain alignment across teams, and ensure accurate reporting.

Eliminate Manual Efforts

With workflow builder

Automate CRM workflows using a drag-and-drop builder that supports lead assignment, notifications, approvals, task creation, and deal stage updates, helping teams reduce manual work and keep deals moving forward efficiently.





 |

Features to run the customer lifecycle from lead to close

Relationships & Pipeline

- **Leads**
  Capture and manage incoming leads through forms, integrations, and APIs with structured qualification and assignment workflows.
- **Accounts**
  Track accounts and contacts, leverage Crunchbase insights to enrich data, and strengthen relationships across your sales pipeline.
- **Contacts**
  Maintain a centralized contact record with linked deals, activities, emails, and timeline visibility across the sales process.
- **Deals**
  Manage opportunities in a visual pipeline with custom stages, deal values, and automations that reflect your sales cycle.

Dashboards & Reporting

- **Sales Funnel Insights**
  Visualize pipeline health and quickly identify where deals slow down or drop off across stages.
- **Deal Progress Indicators**
  Surface deal progress signals using activity data, timelines, and status changes to guide follow-up priorities.
- **Performance Leaderboards**
  Monitor individual and team performance with real-time metrics tied to deals, activities, and outcomes.
- **Easier Revenue Forecasting**
  Estimate expected revenue using deal values, stage weighting, and pipeline data to support planning decisions.

Collaboration & Productivity

- **Emails & Sequences**
  Sync Gmail or Outlook to track emails, log activities, and send personalized email sequences at scale.
- **Round-Robin Assignment**
  Automatically distribute new leads evenly across reps to ensure fast response times and fair workload balance.
- **Quotes & Documents**
  Create professional quotes and other sales documents using deal data, then share them with customers easily.
- **Lead Assignment & Scoring**
  Automatically assign leads and prioritize them using custom scoring, keeping pipeline organized and deals moving.

AI Designed for Sales Teams

Leverage monday AI to streamline repetitive tasks, summarize meetings, draft emails, and create follow-up items, helping teams save time and maintain momentum across the sales cycle.

AI Email & Task Assistance

Draft, refine, and personalize emails quickly while automatically creating related follow-up tasks, keeping communication consistent and reducing administrative workload.

monday AI Notetaker

Automatically capture and summarize meetings from Zoom or Teams, generating action items so nothing slips through the cracks and follow-ups happen on time.

AI Timeline Summaries & Autofill

Summarize interactions and automatically populate key data fields, giving teams a complete view of customer activity and ensuring accurate, up-to-date records.

Click for More Info

Talk to an Expert for Revenue-Focused CRM

Since 2011, Flycast Partners has helped 1,800+ customers establish operational best practices with enterprise technology solutions, streamlining the software implementation lifecycle, unifying technology systems, and enhancing IT maturity while confidently navigating change.

FlycastPartners.com

844-FLYCAST

info@flycastpartners.com