

FOR SMALL AND MEDIUM SALES ORGANIZATIONS

Run your sales organization from first call to paid invoice.

Your CRM stops at closed-won. Your client portal starts at onboarding. Client Ethos is the one system that runs the whole way through — leads, proposals, signature, billing and delivery — so nothing has to be re-entered, re-explained, or remembered by a person.

CRMs stop at closed-won

Excellent at pipeline. Then the deal closes and the system that knows the customer stops being the one anyone uses.

Client Ethos runs the seam

One system from the first booked call to the paid invoice and the delivered work.

Portals start at onboarding

Excellent at delivery. But they assume the sale happened somewhere else, so selling lives in spreadsheets.

One deal, all the way through

Every stage below is the same system. No exports, no integrations to maintain, no second tool to buy.

- 1 Lead** — Leads and meetings import automatically. Round-robin routing puts each with the right rep.
- 2 Proposal** — Call transcripts become a growth plan and a branded deck, priced from your package catalog.
- 3 Signature** — E-signature built in. The agreement never leaves the portal.
- 4 Invoice** — Signature triggers billing. Payments self-mark, retainers recur, books reconcile nightly.
- 5 Delivery** — Onboarding, project timeline, document requests and health scoring — same system, same login.

Five things none of the six we measured offer

Measured against LaunchBay, Copilot, SuiteDash, Moxo, Clinked and Bonsai — none of them offer these.

The invoice sends itself when the contract is signed

Signature lands, invoice goes out. The gap between closed and paid stops being a week of admin nobody owns.

Your books audit themselves overnight

Nightly reconciliation re-checks every payment against every invoice, so billing mistakes surface the next morning, not in month three.

Every engagement carries an AI health score

You see an account going quiet before the client tells you — risk on a dashboard instead of in a cancellation email.

You own the data and the accounts

Your database, your Stripe, your domain. Not a tenant inside someone else's software.

Two hours of business coaching, every month — included

Software alone doesn't grow a firm. Every subscription includes two hours a month, booked right inside your portal — no extra fee. You're coached by people who have built and run services firms:



John Allegretti
Founder / CEO

- ✓ Turns messy client operations into clean, repeatable systems
- ✓ Hands-on AI implementation for small and mid-sized firms
- ✓ Runs engagements end to end, kickoff through delivered results



TJ Richards
SVP, Revenue & Commercial Strategy

- ✓ 25+ years scaling sales organizations across SaaS, healthcare and finance
- ✓ Go-to-market strategy and predictable, data-driven revenue growth
- ✓ Global commercial leadership across North America, LatAm, EMEA and APAC



Jajaida Alfaro
Advisor / COO

- ✓ Project execution that lands on time, on budget, and on-goal
- ✓ Operational strategy for growing teams and day-to-day operations
- ✓ Turns new tools and AI into working daily routines

THE HONEST VERSION

Where Client Ethos is the only full tick.

16 of 33 measured capabilities. The other 17 rows — where competitors match us — are in the full comparison at your request.

Capability	Client Ethos	LaunchBay	Copilot	SuiteDash	Moxo	Clinked	Bonsai
Help center / knowledge base	✓	—	—	~	—	~	—
Light & dark mode	✓	—	~	—	—	—	—
Leads & meetings auto-import from your booking/CRM source	✓	—	—	~	—	—	—
Rep-specific client scheduling	✓	~	—	~	~	—	~
Shared team inbox (email in/out)	✓	—	~	~	~	~	—
Rep round-robin lead routing	✓	—	—	—	~	—	—
Invoice sends itself when the contract is signed	✓	—	—	—	—	—	—
Nightly payment reconciliation (self-auditing books)	✓	—	—	—	—	—	—
VA & team management (roles, task boards, My Day)	✓	~	~	~	~	~	—
Client feedback (CSAT) built in	✓	—	—	~	—	—	—
AI health score for every engagement	✓	—	—	—	—	—	—
AI assistant that routes you to the right page	✓	~	—	—	~	—	—
AI call-transcript tools	✓	~	—	—	—	—	—
Business coaching included (2 hrs/month with an operator)	✓	—	—	—	—	—	—
Project delivery after the sale (task boards, comments, progress)	✓	—	—	—	—	—	—
You own your data & accounts	✓	—	—	—	—	—	—
Installed & maintained for you	✓	—	—	—	~	~	—

✓ built in ~ partial or paid add-on — not offered. Competitor marks compiled from vendors' public materials, July 2026.

Who it's for

- ✓ Two to fifty people selling and delivering
- ✓ Agencies, consultancies and services firms billing retainers
- ✓ Teams spanning a CRM, a portal, a signature tool and a spreadsheet
- ✓ Anyone who has ever found an unbilled signed contract

What it costs

- ✓ From \$495/month, flat — no per-user charges
- ✓ Unlimited clients and unlimited team seats*
- ✓ Two hours of business coaching every month, included
- ✓ Project delivery built in — no separate PM tool to buy
- ✓ Delivered in your language — any language, covered by setup
- ✓ Installed, configured and maintained for you
- ✓ Your own domain, your own accounts, your data

* Fair use. We'll confirm the specifics for a team your size before you sign.

Working in healthcare? A HIPAA-ready deployment is available now — talk to us before you sign anything else.

Get pricing and implementation timing

Tell us how you sell and deliver today and we'll show you the same journey inside Client Ethos, with a straight answer on cost and how quickly you'd be running.

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