Dawgen GLOBAL

SERVICE BROCHURE · TECHNOLOGY & CYBER

Dawgen Workflow Automation & CRM

Stop Re-Keying the Business

Connect the systems you already pay for so data moves on its own, and set up a CRM your sales team will actually use.



Dawgen Global illustration

THE BUSINESS ISSUE

Every business has a job nobody was hired to do: copying data from one system to another.

Enquiries are typed into the CRM. Sales are re-entered into accounts. Supplier invoices are keyed, printed, chased for signature and posted. New employees are added to payroll, access lists and spreadsheets one by one. Each task takes minutes; across a team and a year it adds up to skilled salaries spent on copying, with errors to match.

WHY NOW

Your tools can connect

Most modern business applications can now exchange data automatically through secure connectors.

Leads expect speed

Prospects who wait a day for a reply often buy elsewhere.

Time is the scarcest resource

Hours spent re-keying are hours not spent on customers, analysis or growth.

THE COST OF STANDING STILL

1. Hours of re-keying every week
2. Leads lost in inboxes
3. Invoices paid twice or not at all
4. Customer records that disagree

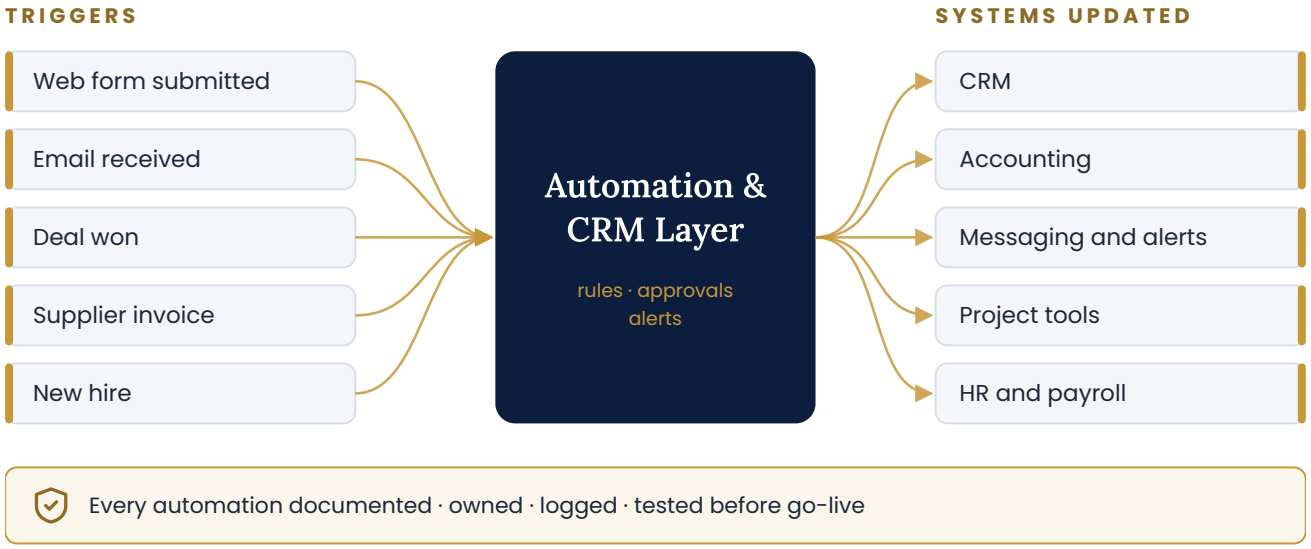
> *If your people copy the same data from one system to another, you are paying skilled staff to be a cable.*

THE SOLUTION

How Dawgen Workflow Automation & CRM works

Dawgen Workflow Automation & CRM connects the applications your business already uses so that information moves automatically when something happens. We set up a CRM around how your team really sells, automate finance hand-offs such as invoice approval and posting, and document every automation with a named owner, so the business stays in control.

SOLUTION AT A GLANCE



WHAT MAKES IT DIFFERENT

Built on what you own

We connect the software you already pay for before suggesting anything new.

Quick wins first

The first three automations are delivered early so you see the hours come back.

Auditable by design

Every automation that touches money or customer data is documented, logged and tested.

THE DIFFERENCE IT MAKES

TODAY	WITH DAWGEN WORKFLOW AUTOMATION & CRM
Hours of re-keying every week	Data moving between systems on its own
Leads lost in inboxes	Every lead captured and followed up
Invoices paid twice or not at all	Invoices approved and posted on time
Customer records that disagree	One consistent customer record

WHAT WE DELIVER

Six capabilities, one accountable team

Each Dawgen Workflow Automation & CRM engagement draws on the capabilities below, selected and sized to your needs. Dawgen Global leads every engagement and is accountable for the result.

Process automation

Data moves between applications automatically.

- Forms, email and spreadsheets
- CRM, accounting and messaging
- Alerts and reminders

CRM set-up

A CRM shaped to your sales process.

- Sales stages that match reality
- Automatic follow-up sequences
- Pipeline dashboards

Finance automation

Fewer manual steps in finance.

- Invoice capture and approval
- Posting to accounting
- Payment reminders

Custom connectors

Integrations where no ready link exists.

- Secure API connections
- Data mapping and validation
- Error handling

Run book

Clear documentation for every automation.

- Trigger, action and owner
- Error alerts
- Change log

Your accounts, your control

No lock-in to any provider.

- You own every licence
- Access you can revoke
- Handover on request

Delivered by Dawgen Global's Technology & Cyber team and its associate consultants, under the firm's quality and supervision framework.

HOW WE DELIVER

A proven path from first workshop to live service

1 Opportunity Scan — 2 weeks

2 Quick wins — 2–4 weeks

3 CRM and wider build — 4–8 weeks

4 Handover — After completion

1 Opportunity Scan

ACTIVITIES

- Interview the teams doing the work
- List every manual hand-off
- Rank by hours saved and risk

DELIVERABLES

- Top ten automations, ranked
- Business case

2 Quick wins

ACTIVITIES

- Build the first three automations
- Test with real scenarios
- Measure hours saved

DELIVERABLES

- Three live automations
- Hours-saved baseline

3 CRM and wider build

ACTIVITIES

- CRM configuration
- Data clean-up and import
- Remaining automations

DELIVERABLES

- Live CRM
- Full automation set

4 Handover

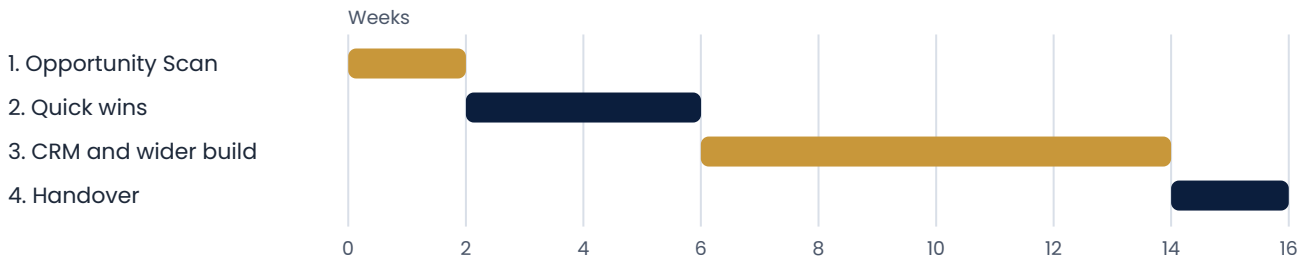
ACTIVITIES

- Run book
- Team training
- Optional monthly support

DELIVERABLES

- Trained owners
- Run book

INDICATIVE TIMELINE



Timelines are indicative and depend on scope. Because we size the team to your deadline, they can be shortened where earlier delivery is needed.

WHO DOES WHAT

DAWGEN GLOBAL

- Leads and manages the project
- Tests independently before go-live
- Designs, builds and integrates
- Trains your team after completion

YOUR TEAM

- Names a sponsor and decision-maker
- Takes part in acceptance testing
- Gives access to people, data and systems
- Signs off each phase

WHERE IT CREATES VALUE

Built for Caribbean sectors

SMEs
Orders, invoices and customer follow-up without double entry.

Real estate
Lead capture, viewing schedules and tenant communications.

Education
Enquiries, admissions and fee reminders.

NGOs
Donor records, grant reporting and volunteer coordination.

Professional firms
Client onboarding, engagement tracking and billing.

Finance teams
Invoice approval, posting and supplier communications.

IN PRACTICE

Multi-system integration

THE CHALLENGE

Records were moved by hand between web forms, the CRM, project tools and accounting.

WHAT WE DID

Automations connecting the business tools so records and actions flow between systems as soon as an event happens.

THE OUTCOME

Less manual effort, fewer errors and faster response to customers.

Lead management

THE CHALLENGE

Website and campaign leads sat in inboxes and follow-up depended on memory.

WHAT WE DID

Lead capture into the CRM with automatic follow-up sequences, contact sync and booking.

THE OUTCOME

Every lead captured and followed up on time, with a clear pipeline for management.

Engagement examples are anonymised to protect client confidentiality.

OUTCOMES AND GOVERNANCE

Value you can measure, controls you can rely on

OUTCOMES WE TRACK WITH YOU

- **Staff hours released per month**
- **Lead response time**
- **Lead-to-sale conversion**
- **Re-keying errors removed**

BUILT-IN CONTROLS



1. A named owner for every automation
2. Documentation of triggers and actions
3. Testing before go-live
4. A log of every action taken
5. Client ownership of all accounts

WHY DAWGEN GLOBAL

Big firm capabilities, Caribbean understanding
More than 24 years serving Caribbean business, across 35 territories, managed centrally from Dawgen Towers, Kingston.

We own delivery
Dawgen Global owns the project through to completion, then trains your team so the solution is yours.

One firm, many disciplines
Tax, accounting, risk, legal and HR colleagues are on hand when a technology decision touches their field.

Controls an auditor would expect
Every solution is designed with access, audit-trail and data-protection controls from the first day, not added after a review.

Scope before fee
We are process-driven: we agree the scope first, then fix the fee, and size the team to meet your deadline.

QUESTIONS CLIENTS ASK

Do we need to buy new software?

Usually not. We start by connecting what you already have and recommend new tools only where there is a clear gap.

What happens if an automation fails?

Every automation has a named owner and error alerts, and the run book explains what to do.

Which CRM should we use?

The one your team will use. We recommend options to suit your sales process, size and budget.

How soon will we see results?

The first three automations are typically live within weeks of the Opportunity Scan.

START HERE — 2 weeks

Automation Opportunity Scan

WHAT IT COVERS

- Interviews with the teams doing the work
- A map of manual hand-offs
- Ranking by hours saved and risk
- Review of current software

WHAT YOU RECEIVE

- Your top ten automations, ranked
- Estimated hours saved
- A quick-win build plan
- A fixed-fee quote

1. Contact us at info@dawgen.global
2. Book your Automation Opportunity Scan
3. Receive a fixed-scope plan and quote

EMAIL info@dawgen.global WEB dawgen.global US 855-354-2447

Every engagement is scoped and priced through its engagement letter. Engagement examples are anonymised. Every territory has its own desk: write to territory@dawgen.com, or info@dawgen.global for Jamaica. Dawgen Global serves 35 territories across the Caribbean and the Americas from Dawgen Towers, 47-49 Trinidad Terrace, Kingston 5, Jamaica. Dawgen Global is an integrated multidisciplinary professional services firm and is not a member of any international network. As a multidisciplinary firm, Dawgen Global offers some regulated services; in each case the head of the regulated division holds the professional practice licence required in the relevant jurisdiction. Product and platform names, where used, belong to their owners. General information only, not professional advice. © 2026 Dawgen Global.