



Agentic AI-driven SFA

For the Next Generation
Sales Reps

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October 2025



AI-enabled Sales Rep User Journeys

AI & Agents to empower Med/Sales Reps

Talk to your Data

Agents designed to find customers in the database by natural language request

Recommended Visits

Agents designed to build visit schedules based on the desired optimization criteria

General Purpose Agent

Vocal Customer 360

Agent analyzes 360 customer view to extract key info & trends for sales rep's upcoming visit and then vocally provides this information to a sales rep

Next Best Action

Agent analyzes customer data to prepare a list of recommended actions

Recommended Visit Steps

AI tailors visits to a specific customer helping sales reps focus on the most important aspects

Smart Order

Sales rep can simply ask the AI agent to create or modify an order, making the process faster, smarter, and error-free

Voice-to-action

Sales rep explains vocally what he sees, and the system automatically fills in parts of the visit report

Recommended Order, Assortment & POS

Helps to increase revenue, make reps' life easier and guide your customers

Visit Summary & Action Items

Agent analyzes the visit report and survey to extract insights and help refine future visit plans

Manager's Briefing

Agent summarizes daily (or weekly) activities of the teams in a comprehensive memo, highlighting quantitative & qualitative KPIs and items, requiring attention.



Visit Planning

Visit Preparation

Visit Execution

Visit Conclusion



Smart Order Assistant

Agent that streamlines your order workflows

Order Taking demands transformation

Growing Need for Innovation in Order taking industry for B2B

Technological and administrative complexity of Order Taking process brings demand for more advanced solutions for CH industry



Stock management

Complex organization of quotas and availability information requires constant up to date data to validate Orders



Product structure evolution

SKU variety, bundles and freebies structure should remain clear while comprehensive



Discounts Complexity

Providing best offer for Customer while increasing sales and encourage to participate in promotions

With rising number of factors crucial for decision-making while Order Taking, there is a rising demand for solutions to support any level of complexity while keeping user experience smooth

Complex Order Taking challenges

Growing Need for Innovation in Order taking industry for B2B

Technological and administrative complexity of Order Taking brings demand for more advanced solutions for CH industry

Human errors

Industries that involve complex product configurations or custom orders often see human error rates in order-taking ranging **from 5% to 15%**.

Missing the best offer

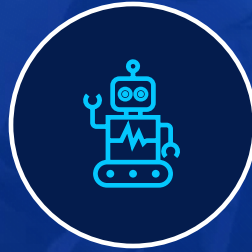
Excessive variety of discount and its complex structure makes it difficult to provide the best customer offer while increasing sales. Manual check for all available discounts can be time consuming

Time consuming process

Excessive variety of discount and its complex structure makes it difficult to provide the best customer offer while increasing sales. Manual check for all available discounts can be time consuming

AI Agent

Improving Order Taking
with Adaptive AI



Our AI Agent transforms Order Taking into precise and data-driven process.

Agent provides automation for data entry and suggests improvements by **analysing trends in real time, fixing errors and suggesting next best action.**

AI Agent Tailored to your organization

- Designed to adapt to **your organization's specific order taking process**
- **Trained on your data** to provide data-driven insights in real time
- Provides automation for manual data entry to **save time** and **reduce human errors**

Data Analysis & Personalized Recommendations

- **Monitors trends and anomalies** during order taking in real time
- **Adapts recommendations** based on customer specifics and sets KPIs to grow sales
- **Recognises trends and makes predictions** based on historical data

Smart Order Assistant: **Use Cases**

7 use cases to streamline your workflows



Order Creation from Photo/File

Quota Check for Order Cart



Smart Order Templates

Promo Suggestions

Mass Actions in the Order Cart

Optimizing Discounts



- General Availability: October 2025

Recommended Order



Demo

Customer 360

Get a concise relevant brief from AI Agent

The Challenge

The Sales reps struggle to analyze vast amounts of customer data spread across multiple systems. Finding the most **critical insights** quickly is time-consuming and inefficient

The Solution

Our AI Agent enables sales teams to **focus on what truly matters** by:

- ✓ Aggregating customer data from multiple sources
- ✓ Identifying key trends, risks, and opportunities
- ✓ Providing a concise, actionable 360° customer brief

13:51 Mon 6 Oct

Cancel Next

1 Preparation

INFO

Status	Planned
Account	Aurora Berlin Lakeshore Hospital
Contact	Alex Foster
Start Date	6 October 2025 at 14:00
End Date	6 October 2025 at 15:00

HCP DETAILS

Name	Mr. Alex Foster
Speciality	Oncologist
Type of Doctor	Oncologist
Type of procedure	Oncology
Type of Qualification	Professor
Number of patients	65
Interest in further trainings	☒

DOCTOR OVERVIEW Close

Key Metrics: The current marketing cycle ends on November 30, 2025. Planned calls for this period are 5, with 4 calls completed to date. Priority: 1 call remaining before the cycle ends. The last call took place on September 24, 2025. Given the cycle ends within the next 30 days, consider increasing planned calls for the remaining period.

Doctor's Profile: The doctor is an oncologist with a patient base of 65 and specializes in oncology. They are a professor and have expressed interest in further training opportunities.

Recent Calls: The most recent face-to-face call was completed on September 24, 2025. The most popular start time for calls appears to be between 9:00 AM and 12:00 PM. No significant gaps in calls were observed for this period. Calls have been frequent, with consistent scheduling throughout the year.

Sample Orders: The doctor has ordered 2 SKUs of Alvesco (Ciclesonide) 100mcg and 1 SKU of Megamylase on August 7, 2025. As the doctor has already used 2 SKUs this year, no additional samples are available for issuance in 2025.

Last Call:
Last Communication Date: February 6, 2025, at 2:00 PM.
Focus Products: None specified for the last call.
Visit Summary: Not provided.
Next Objectives: Plan the next interaction and discuss the increase of turnover.

Actionable Recommendations: Schedule the remaining call before November 30, 2025, to meet the target frequency. Leverage the doctor's interest in training by proposing relevant sessions or materials. Avoid sample discussions, as the doctor has reached their annual limit. Verify the planned call dates and ensure timely follow-up on objectives discussed.

Strategic Considerations for Analysis: Explore opportunities to deepen engagement through training initiatives, given the doctor's expressed interest. Monitor the alignment of call objectives with broader strategic goals, such as turnover growth. Address any potential scheduling conflicts to ensure consistent contact frequency.

Feedback

Rate the AI Summary ☒ ☐

Record your Feedback

Next Best Action

Get tailored recommendations from AI Agent

With this **data-driven guidance**, sales reps can optimize each store interaction and **achieve better outcomes**.

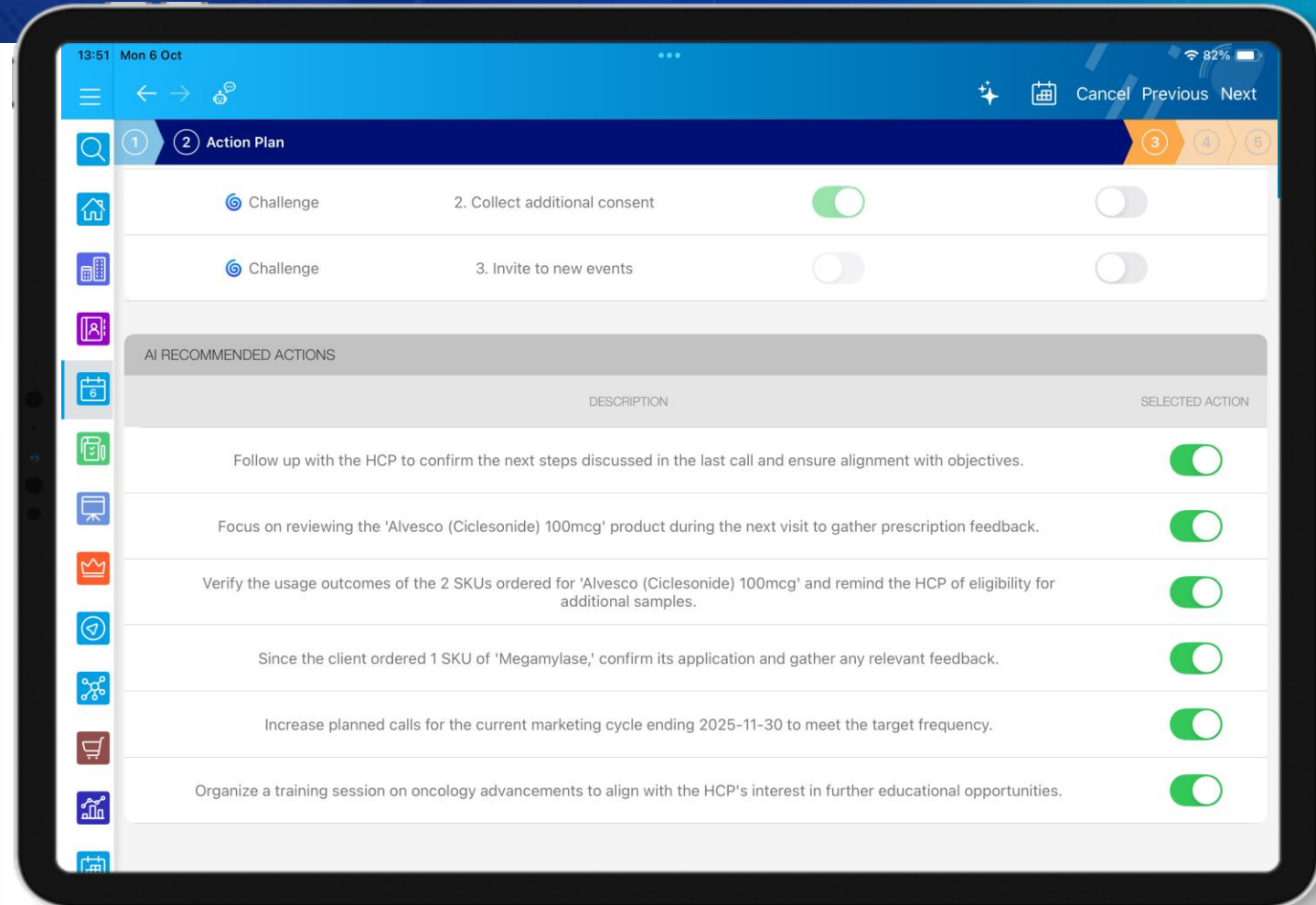
The Challenge

Sales reps often struggle **to determine the best next steps** for each visit. Filtering through historical visit notes, transactional data, and product performance can be time-consuming and prone to oversight

The Solution

Our AI agent analyzes store details, past visit reports, and transactional records to create a **personalized action plan** for every visit, helping reps focus on the most impactful opportunities. This includes:

- ✓ Prioritizing key products or promotions based on current trends
- ✓ Identifying cross-sell / up-sell opportunities
- ✓ Highlighting potential risks and customer needs





Demo



Thank you!

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