EXEEVO®

The AI Advantage

Driving life sciences sales performance and customer engagement with next-generation tools

Microsoft Partner

This content is for

Life sciences commercial leaders seeking practical insights about harnessing next-generation AI CRM to improve field rep productivity, sales team performance, and HCP customer engagement

Table of contents

Back to Contents

The AI Advantage: Driving life
sciences field rep sales
performance with an AI CRM

4

How next-generation AI CRM enables life sciences sales success

Life sciences organizations expect field rep teams to increase efficiency and create personalized HCP connections.

Without the right tools, these goals clash. As field reps load up on HCPs, they spend more time writing emails and juggling data—and less time engaging with promising prospects. Sales leaders lack the data to turn closed deals into repeatable best practices, making training less effective than it should be.

What's missing is a way to make sense of data and turn it to their advantage. That's why a next-generation AI CRM has the potential to transform performance.

68%
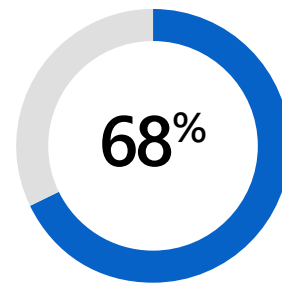
68% of people say they don't have enough uninterrupted focus time during the workday.[1]

It can empower field reps to instantly surface the most critical data, generate new and original content, and automate CRM tasks. It also enables sales leaders to discover which sales efforts work and why —and gives them insights to inform strategic decisions.

AI is poised to create a new way of working by helping field reps...

Cut the drudgery: Focus on building HCP relationships by automating and simplifying tasks with AI-generated emails, meeting summaries, data collection, and data entry.

Connect the data: Answer HCP questions immediately with easy access to the right information in the flow of work.

Crush the sale: Keep the momentum rolling with AI-powered recommendations and reminders.

Continuously improve: Learn what works from real-time analysis of HCP conversations and interactions for better coaching and performance.

AI has already demonstrated that it can dramatically improve the workplace experience. In a recent survey, 89 percent of workers with access to automation and AI-powered tools feel more fulfilled because they can spend time on work that truly matters.[2]
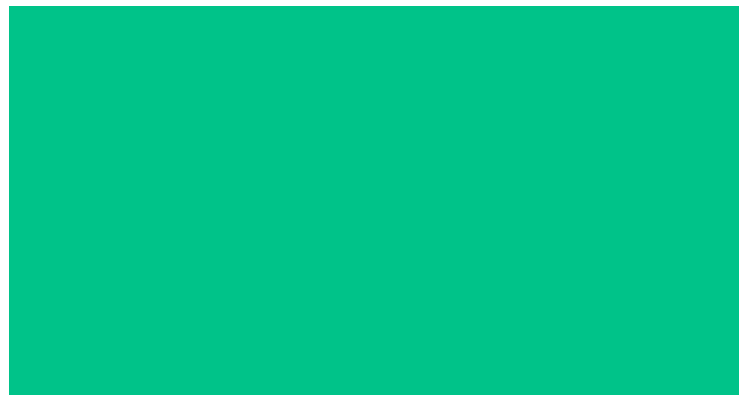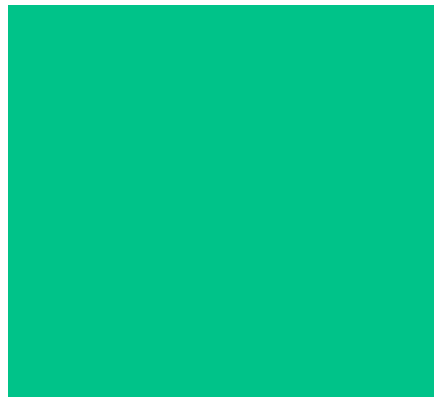
Start your journey right

Making the most of AI requires more than just turning on the tools. It's essential to choose the right capabilities, train people to use them, and ensure data privacy and security. In this e-book, we'll help you make the most of this emerging game-changer with insights about:

- **How** to choose next-generation AI tools for sellers
- **Where** an **AI** CRM **can make the most significant impact**
- **Training** field **teams for AI** CRM **adoption**
- **Ensuring** responsible use of AI

"AI will remove the drudgery of work and unleash creativity. There's an enormous opportunity for AI-powered tools to help alleviate digital debt, build AI aptitude, and empower employees."

Satya Nadella,

Chairman and CEO, Microsoft[3]

Back to Contents

The AI Advantage: Driving life
sciences field rep sales
performance with an AI CRM

7

Choosing the right AI-powered CRM solution

↑ Back to Contents

The AI Advantage: Driving life
sciences field rep sales
performance with an AI CRM

8

The number of life sciences and general-purpose sales-specific AI tools available has grown significantly, providing many options. The best way to choose the right one for your business is to match critical use cases and pain points with the capabilities **of a given platform.**

What do people want?

Luckily, there's data on this question. Asked to imagine work in 2030, people said they'd place the most value on changes that saved them time, enabling them to produce high-quality work and learn new skills faster.[4] More specifically, 85 percent want digital tools that help them be more agile, automate daily tasks, and make information more accessible.[5]

Therefore, a AI CRM for field reps should:

Be quick and easy to learn and adopt. Employees feel their time is scarce and valuable—there's a limit to how much effort they will invest in learning a new tool if the old way seems "good enough."

Make a noticeable impact. The best AI experiences feel immediately transformative to employees. They can make something that was painful and annoying easy, even fun.

Free employees to be more creative and invested. People don't want to save time so they can do more busywork. They want to use their skills and knowledge in meaningful ways. AI should help them focus and engage so they can do their best work.
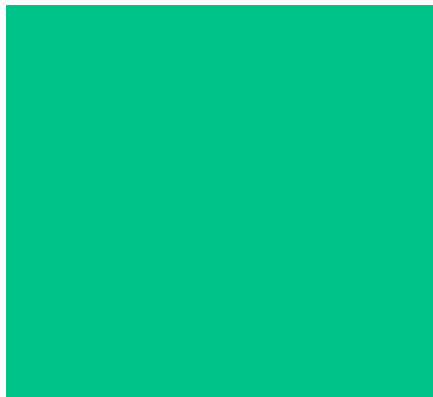
Keep humans in the driver's seat. AI should feel like a copilot, not a robot overlord. Keeping people at the center is essential to adoption, results, and ethical usage. Humans should always have the final say about any content or action the tools generate.

Back to Contents

The AI Advantage: Driving life
sciences field rep sales
performance with an AI CRM

9

Tips for making the right decision

Your journey to empowering your field
team with AI is unique. Knowing what it
can do and how it matches your team's
needs can help you choose the right tools.

- **Learn about the tech.** You don't have
to be a data scientist to use next-
generation AI. But understanding
how it works and what's behind a
given solution can help you know the
vendor's approach and how seriously
they take developing these tools.

- **Ask the team.** Find the top pain
points in the typical workday through
conversations or surveys.

- **Try it out for yourself.** Look for a free
trial or guided demo to see how the
tools work.

- **Get opinions from top sellers and
leaders.** Put a team together to pilot
AI-based tools in real-world situations.

**The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM**

10

The importance of integration

The usefulness of next-generation AI CRM depends on the data it can access and the number of ways employees can interact with it. Solutions that work with existing technology and data at your organization give you a head start on driving adoption and ROI.

Here are two crucial questions to ask.

Does it integrate with existing experiences?

Does it integrate with your existing data?

Many life sciences vendors offer standalone CRMs. However, driving adoption and value is easier for field teams when next-generation AI integrates into the typical workday systems. It makes sense to look for tools that are part of a full-featured platform or interoperate with your existing technology investments.

When employees use AI that works with your company's data, especially CRM, they can more easily create personalized content and gain actionable insights. AI systems connected to a unified data platform help people break through silos and gain a 360-degree HCP view.

**The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM**

10

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Back to Contents

The AI Advantage: Driving life
sciences field rep sales
performance with an AI CRM

10

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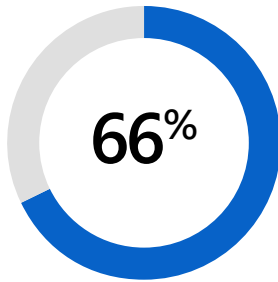
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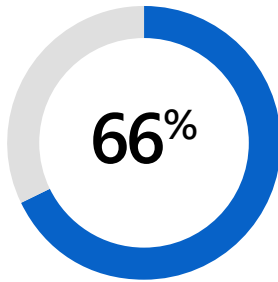
The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

12

66%

Field reps face many demands on their time—not all of them equally productive for closing deals. With AI, they can get routine tasks done in less time. How does it work in the real world? Let's take a look.

Field reps spend up to 66% of their day dealing with email.[6]

Creating HCP emails

Current process:

The rep drafts emails from scratch or based on a template, personalizing them for each HCP by manually inputting relevant information.

AI-enabled process:

The rep uses natural-language prompts to rapidly generate personalized email content that automatically incorporates details based on CRM and past interactions. The rep then refines the message further as needed.

Considerations for adoption:

- **Ensure the AI-generated emails align with brand voice and guidelines.**

- **Maintain a balance between automation and personalization.**

- **Monitor for any potential biases or incorrect information in the content.**

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

13

Recapping sales meetings

Current process:

Field reps take notes during meetings and then manually write meeting summaries, often after hours.

AI-enabled process:

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Considerations for adoption:

- Evaluate the accuracy and reliability of AI transcription services.
- Ensure sensitive information is handled securely.
- Provide training to **field** teams on effectively using recaps.

Identifying and prioritizing opportunities

Current process:

Sales teams rely on manual research, data analysis, and subjective judgment to identify and prioritize potential business opportunities.

AI-enabled process:

AI algorithms analyze vast amounts of data, including market trends, customer behavior, and historical data, to identify and rank high-potential opportunities.

Considerations for adoption:

- Validate the AI algorithms' effectiveness in identifying relevant opportunities.
- Integrate AI insights with human expertise.
- Establish clear criteria for opportunity prioritization.

Coaching and performance improvement

Current process:

Sales leaders provide feedback to team members based on their observations and subjective assessments.

AI-enabled process:

Sales leaders use AI-powered tools to identify successful strategies based on detailed analysis of calls, KPIs, and other data. They can provide personalized coaching recommendations based on data-driven insights.

Considerations for adoption:

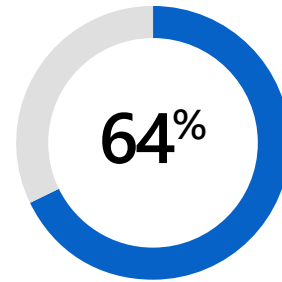- **Ensure the tools align with the organization's coaching methodologies.**

- **Address privacy concerns related to performance data.**

- **Strike a balance between automated feedback and human guidance.**

Personalizing HCP customer engagement

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

16

HCPs increasingly expect personalized interactions, fast answers to questions, and a seamless cross-channel experience. Field reps using next-generation AI have the advantage. They can quickly incorporate relevant data into their interactions and gain valuable insights when and where needed.

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64% of consumers wish companies would respond faster to meet their changing needs.[7]

In the battle for customer loyalty, here are three ways that teams can use AI to make customers feel heard.

Staying informed: Field reps can get summaries of the latest interactions, news, and relevant information specific to a given customer without searching multiple sources. AI analyzes past interactions and numerous data sources to provide comprehensive, real-time insights on demand. A rep can go into a meeting with a clear picture of the HCP's recent activities, needs, and expectations, enhancing the conversation and the overall relationship.

Sharing relevant content: Field reps can further elevate customer engagement using AI-driven content recommendations. The tool analyzes a HCP's past interactions,

preferences, and behavior and predicts the most engaging content. Whether a blog post, a new product update, or a personalized offer, the right content at the right time can significantly enhance HCP engagement.

Following up: Prioritizing follow-up actions can be challenging in a fast-paced sales environment. Using AI, reps can get key points, competitor mentions, and follow-up actions from emails and calls to promptly address issues and opportunities. This enhanced attention to detail can improve HCP perceptions without increasing demands on busy sellers.

Training field teams for AI adoption

While the best AI tools are easy to adopt, training ensures a smooth transition. It minimizes resistance and misunderstandings that could hinder successful integration. It also opens their eyes to the breadth of ways they can take advantage of these new capabilities, leading to better results and greater ROI.

Start with a high-level understanding of how AI works

Begin with the basics. When people understand what AI is—and what it isn't—they can use it more effectively. Here are a few high-level talking points.

- People interact with AI using natural language, which makes using it easy—you don't need special training or knowledge.

- It's good at handling lots of information. It can take vast amounts of data and make sense of it. This might mean understanding HCP habits or spotting patterns in sales data.

- AI can also create content based on what it has "learned" from data and human input. It can help write emails or create pitches based on what it's been taught.

- Finally, AI is here to help you, not replace you. It works best when humans are involved, adding their knowledge, perspective, and judgment that machines can't duplicate.

**The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM**

19

Share specific best practices and skills

When training field reps to use generative AI, these are among the most important specific skills they should learn.

1. **Crafting prompts:** To use generative AI, users input prompts. Prompts are text-based questions or requests the AI responds to, usually written in natural language. Different prompts generate different outputs. As a first step, sellers should focus on crafting clear, specific, detailed prompts and experimenting with different approaches. Some generative AI tools provide specific kinds of output, such as a first draft of an email. Others are more open-ended and can perform various tasks, such as summarizing text, generating content ideas, and even writing articles.

2. **Being creative and iterative:** AI is a tool that encourages experimentation. If the AI doesn't produce the desired output on the first try, tweaking the prompt or approach might yield better results. One way to think of this skill is "co-reasoning"—ideating alongside AI by engaging with it and shaping the outcomes over multiple question-and-answer interactions.

3. **Double-checking content:** While AI is powerful, it's important to remember it's a machine and can make mistakes. This helps avoid potential miscommunication or errors. Having a human – or humans – in the loop ensures the content aligns with the brand and is helpful for the intended audience.
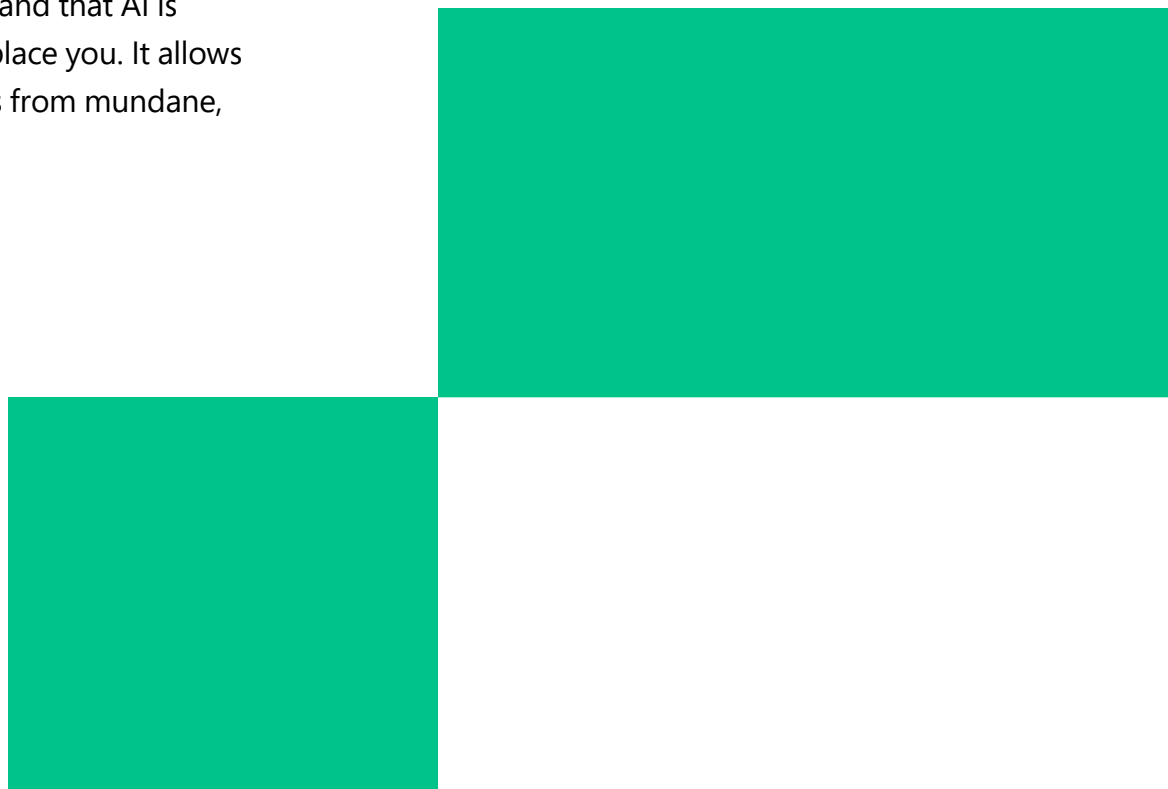
The mindset shift

Learning to use a AI CRM is not only about acquiring new skills or getting familiar with new tools. It's about a fundamental shift in mindset regarding where to allocate time and focus.

In one survey, leaders said they believe analytical judgment, flexibility, and emotional intelligence will be essential skills for employees in an AI-powered future.[8] These skills are vital because they help sellers make sense of AI-generated insights and adapt to new AI-driven processes while still connecting with HCPs on a human level.

It's important to understand that AI is here to help you, not replace you. It allows sellers to shift their focus from mundane, repetitive tasks to higher-value activities. This shift will enable them to concentrate more on interacting with customers, building relationships, and closing sales.

Successful use of AI treats the technology as a copilot rather than a self-contained solution. For instance, rather than sending an AI-generated email without reading it, it's far more effective to use it to speed up the crafting of a personalized response. The tool can generate the bulk of the content, but the salesperson is the one who makes it truly personal and practical.

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

21

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> **When evaluating an AI CRM solution, ask questions about security, privacy, and ethical principles, and be confident that the vendor meets your standards.**

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Dive in

A next-generation AI CRM can help field reps personalize the HCP experience, be more productive, and enhance performance based on data. Putting people at the center supports greater creativity, engagement, and satisfaction.

Exeevo CRM is a life sciences role-based AI copilot designed for field teams and sales managers to help them automate everyday tasks and unlock creativity. They empower field teams to deliver personalized HCP experiences efficiently, focus on the most valuable opportunities and tasks, and identify best practices to close more deals. Exeevo CRM is part of a unified solution with apps for sales, marketing, medical and operations. It is built on Dynamics 365 and Microsoft 365 apps like Microsoft Teams and Outlook, and also seamless connects to hundreds of other apps.

Learn more

[1] Work Trend Index | Will AI Fix Work?, Microsoft, 2023
[2] Four Ways Leaders Can Empower People for How Work Gets Done, Microsoft, 2023
[3] Work Trend Index | Will AI Fix Work?, Microsoft, 2023
[4] Work Trend Index | Will AI Fix Work?, Microsoft, 2023
[5] Four Ways Leaders Can Empower People for How Work Gets Done, Microsoft, 2023
[6] Microsoft boosts Viva Sales with new GPT seller experience - Microsoft Dynamics 365 Blog, Microsoft, 2023
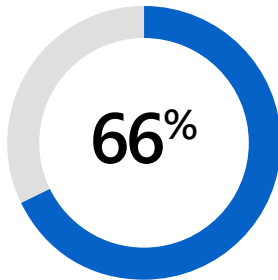[7] A Life-Centric Approach to Business, Accenture, 2022
[8] Work Trend Index | Will AI Fix Work?, M

Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

11

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↑ Back to Contents

The AI Advantage: Driving life
sciences sales performance wit
next-generation tools

14

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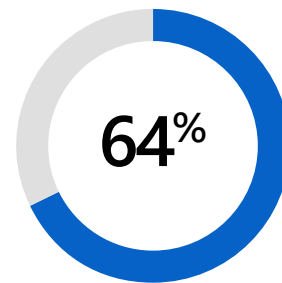
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Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

17

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↑ Back to Contents

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sciences sales performance
with an AI CRM

19

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**The AI Advantage: Driving life
sciences sales performance
with an AI CRM**

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Back to Contents

The AI Advantage: Driving life
sciences field rep sales
performance with an AI CRM

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Back to Contents

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

11

Improving field team focus and productivity

↑ Back to Contents

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

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↑ Back to Contents

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

13

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Considerations for adoption:

- Evaluate the accuracy and reliability of AI transcription services.
- Ensure sensitive information is handled securely.
- Provide training to **field** teams on effectively using recaps.

Identifying and prioritizing opportunities

Current process:

Sales teams rely on manual research, data analysis, and subjective judgment to identify and prioritize potential business opportunities.

AI-enabled process:

AI algorithms analyze vast amounts of data, including market trends, customer behavior, and historical data, to identify and rank high-potential opportunities.

Considerations for adoption:

- Validate the AI algorithms' effectiveness in identifying relevant opportunities.
- Integrate AI insights with human expertise.
- Establish clear criteria for opportunity prioritization.

Coaching and performance improvement

Current process:

Sales leaders provide feedback to team members based on their observations and subjective assessments.

AI-enabled process:

Sales leaders use AI-powered tools to identify successful strategies based on detailed analysis of calls, KPIs, and other data. They can provide personalized coaching recommendations based on data-driven insights.

Considerations for adoption:

- **Ensure the tools align with the organization's coaching methodologies.**

- **Address privacy concerns related to performance data.**

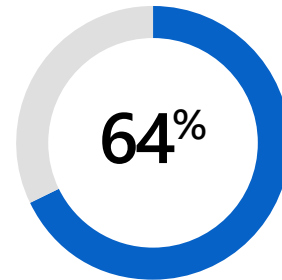- **Strike a balance between automated feedback and human guidance.**

Back to Contents

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

15

Personalizing HCP customer engagement

↑ **Back to Contents**

**The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM**

16

HCPs increasingly expect personalized interactions, fast answers to questions, and a seamless cross-channel experience. Field reps using next-generation AI have the advantage. They can quickly incorporate relevant data into their interactions and gain valuable insights when and where needed.

64%

64% of consumers wish companies would respond faster to meet their changing needs.[7]

In the battle for customer loyalty, here are three ways that teams can use AI to make customers feel heard.

Staying informed: Field reps can get summaries of the latest interactions, news, and relevant information specific to a given customer without searching multiple sources. AI analyzes past interactions and numerous data sources to provide comprehensive, real-time insights on demand. A rep can go into a meeting with a clear picture of the HCP's recent activities, needs, and expectations, enhancing the conversation and the overall relationship.

Sharing relevant content: Field reps can further elevate customer engagement using AI-driven content recommendations. The tool analyzes a HCP's past interactions,

preferences, and behavior and predicts the most engaging content. Whether a blog post, a new product update, or a personalized offer, the right content at the right time can significantly enhance HCP engagement.

Following up: Prioritizing follow-up actions can be challenging in a fast-paced sales environment. Using AI, reps can get key points, competitor mentions, and follow-up actions from emails and calls to promptly address issues and opportunities. This enhanced attention to detail can improve HCP perceptions without increasing demands on busy sellers.

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

17

Training field teams for AI adoption

While the best AI tools are easy to adopt, training ensures a smooth transition. It minimizes resistance and misunderstandings that could hinder successful integration. It also opens their eyes to the breadth of ways they can take advantage of these new capabilities, leading to better results and greater ROI.

Start with a high-level understanding of how AI works

Begin with the basics. When people understand what AI is—and what it isn't—they can use it more effectively. Here are a few high-level talking points.

- People interact with AI using natural language, which makes using it easy—you don't need special training or knowledge.

- It's good at handling lots of information. It can take vast amounts of data and make sense of it. This might mean understanding HCP habits or spotting patterns in sales data.

- AI can also create content based on what it has "learned" from data and human input. It can help write emails or create pitches based on what it's been taught.

- Finally, AI is here to help you, not replace you. It works best when humans are involved, adding their knowledge, perspective, and judgment that machines can't duplicate.

Back to Contents

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

19

Share specific best practices and skills

When training field reps to use generative AI, these are among the most important specific skills they should learn.

1. **Crafting prompts:** To use generative AI, users input prompts. Prompts are text-based questions or requests the AI responds to, usually written in natural language. Different prompts generate different outputs. As a first step, sellers should focus on crafting clear, specific, detailed prompts and experimenting with different approaches. Some generative AI tools provide specific kinds of output, such as a first draft of an email. Others are more open-ended and can perform various tasks, such as summarizing text, generating content ideas, and even writing articles.

2. **Being creative and iterative:** AI is a tool that encourages experimentation. If the AI doesn't produce the desired output on the first try, tweaking the prompt or approach might yield better results. One way to think of this skill is "co-reasoning"—ideating alongside AI by engaging with it and shaping the outcomes over multiple question-and-answer interactions.

3. **Double-checking content:** While AI is powerful, it's important to remember it's a machine and can make mistakes. This helps avoid potential miscommunication or errors. Having a human – or humans – in the loop ensures the content aligns with the brand and is helpful for the intended audience.
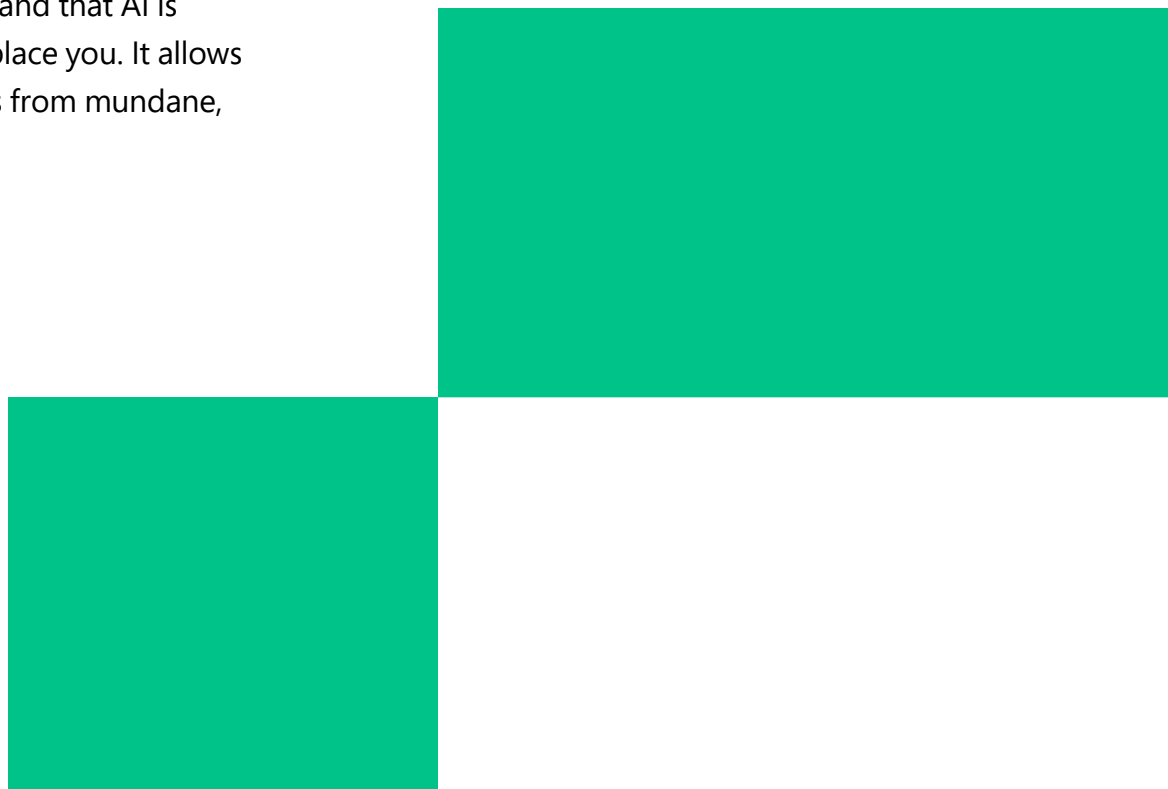
The mindset shift

Learning to use a AI CRM is not only about acquiring new skills or getting familiar with new tools. It's about a fundamental shift in mindset regarding where to allocate time and focus.

In one survey, leaders said they believe analytical judgment, flexibility, and emotional intelligence will be essential skills for employees in an AI-powered future.[8] These skills are vital because they help sellers make sense of AI-generated insights and adapt to new AI-driven processes while still connecting with HCPs on a human level.

It's important to understand that AI is here to help you, not replace you. It allows sellers to shift their focus from mundane, repetitive tasks to higher-value activities. This shift will enable them to concentrate more on interacting with customers, building relationships, and closing sales.

Successful use of AI treats the technology as a copilot rather than a self-contained solution. For instance, rather than sending an AI-generated email without reading it, it's far more effective to use it to speed up the crafting of a personalized response. The tool can generate the bulk of the content, but the salesperson is the one who makes it truly personal and practical.

Back to Contents

The AI Advantage: Driving
life sciences field rep sales
performance with an AI CRM

21

Ensuring responsible use of AI

AI relies on data, so it is critical to ensure the technology is designed to be trustworthy and highly secure. You'll likely be trusting a vendor to meet these criteria, so your choice of partner matters.

When evaluating an AI CRM solution, ask questions about security, privacy, and ethical principles, and be confident that the vendor meets your standards.

Fairness: The system should avoid bias and treat all individuals and groups equitably. It should not favor certain groups over others or discriminate based on characteristics such as race, gender, age, or socioeconomic status.

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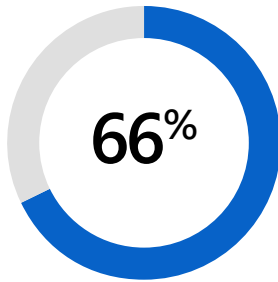
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When you work with a company like Exeevo that follows these principles, you can be more confident using our solutions to enhance business performance and the field team experience.

Improving field team focus and productivity

66%

Field reps spend up to 66% of their day dealing with email.[6]

Field reps face many demands on their time—not all of them equally productive for closing deals. With AI, they can get routine tasks done in less time. How does it work in the real world? Let's take a look.

Creating HCP emails

Current process:

The rep drafts emails from scratch or based on a template, personalizing them for each HCP by manually inputting relevant information.

AI-enabled process:

The rep uses natural-language prompts to rapidly generate personalized email content that automatically incorporates details based on CRM and past interactions. The rep then refines the message further as needed.

Considerations for adoption:

- **Ensure the AI-generated emails align with brand voice and guidelines.**

- **Maintain a balance between automation and personalization.**

- **Monitor for any potential biases or incorrect information in the content.**

Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

13

Recapping sales meetings

Current process:

Field reps take notes during meetings and then manually write meeting summaries, often after hours.

AI-enabled process:

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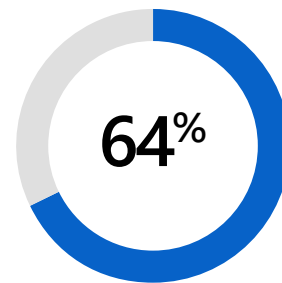- **Strike a balance between automated feedback and human guidance.**

Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

15

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↑ Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

16

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Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

17

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↑ Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

18

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↑ Back to Contents

**The AI Advantage: Driving life
sciences sales performance
with an AI CRM**

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Back to Contents

**The AI Advantage: Driving life
sciences sales performance
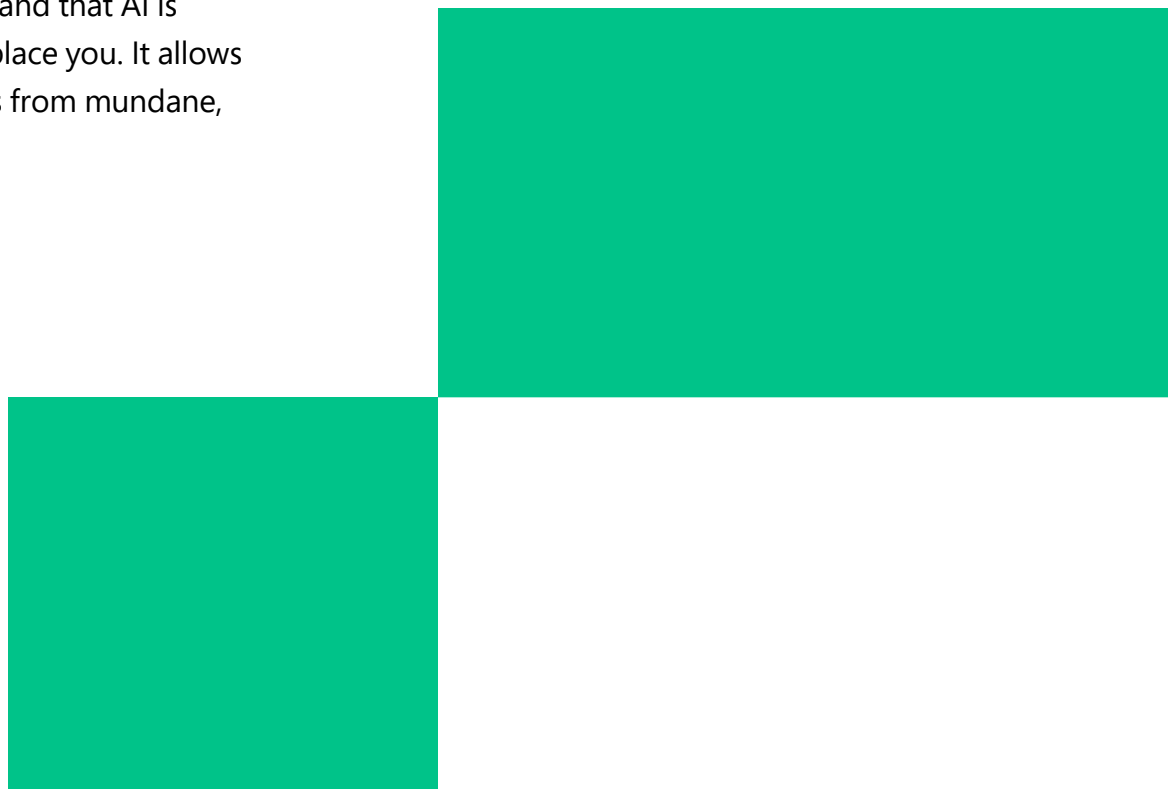with an AI CRM**

20

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Back to Contents

The AI Advantage: Driving life
sciences sales performance
with an AI CRM

21

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