

# Unlocking Field Potential with AI Enablement

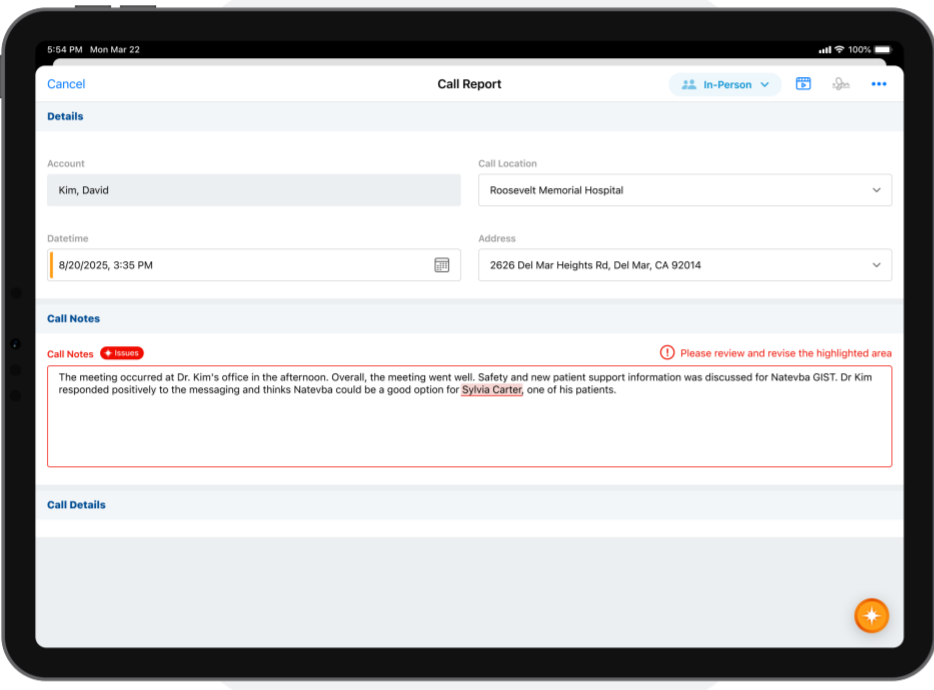
The future of field work is about doing more with less friction. AI agents embedded in **Veeva Vault CRM** make day-to-day activities easier by automating routine tasks and delivering actionable insights directly to the frontline. Instead of just logging data, field teams can use Vault CRM as a launchpad to discover new opportunities and coordinate seamlessly across sales, marketing, and medical functions. By natively embedding commercial processes and compliance guardrails into every interaction, these Veeva AI agents provide a clear, confident path forward for every field user.

## 01

### On-the-go, real-time activity capture

VOICE AGENT

FREE TEXT AGENT



→ **Dictate call notes by voice.**  
AI transcribes voice notes and auto-populates structured data fields in Vault CRM.

→ **Capture insights on the move.**  
AI eliminates the burden of manual entry by allowing users to log details instantly between interactions, removing adoption hurdles by fitting seamlessly into the field user's workflow.

→ **Ensure compliance in real-time.**  
AI validates free text notes against compliance rules, flagging potential risks requiring review and revision, and increasing users' compliance acumen over time.

**USE CASE:**

Transcribe **voice-to-CRM** notes with accuracy and compliance.

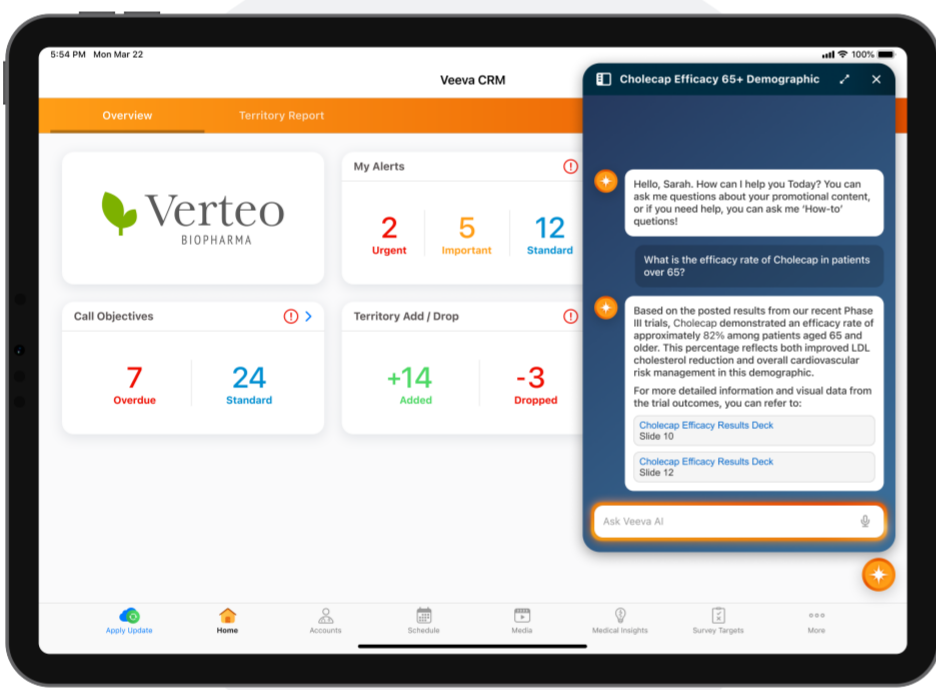


## 02

### Data-driven engagement planning

PRE-CALL AGENT

MEDIA AGENT



→ **Find and summarize content instantly.**  
AI condenses key data and messages across all recommended content for rapid review by the field team member.

→ **Coordinate marketing efforts.**  
The field user reviews and manages scheduled marketing emails, opting in or out, to further tailor a customer's experience.

**USE CASE:**

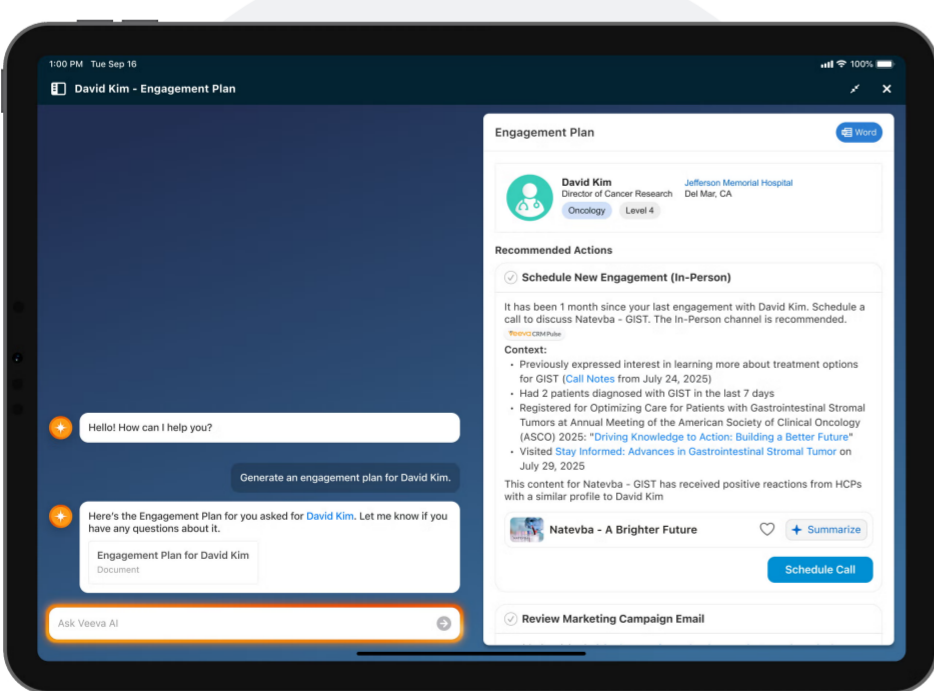
Distill long-form content into key messaging points for **increased rep confidence.**



## 03

### Intelligent targeting and planning

PRE-CALL AGENT



→ **Start with a prioritized activity feed.**  
AI focuses the user on the most relevant alerts and actions in their territory.

→ **Identify top accounts using dynamic Hot Lists.**  
See actionable checklists of the highest-priority accounts to engage.

→ **Generate an AI-powered engagement plan.**  
The field user receives a data-driven strategy for a customer with recommended actions, content, and relationship insights.

**USE CASE:**

Narrow focus to **top accounts** with dynamically created Hot List.



Deep, industry-specific AI agents transform Vault CRM into a dynamic platform for medtech field teams. By streamlining prep and capturing field data automatically, these tools increase field productivity. Veeva AI provides immediate value while building the foundation for more complex AI use cases.

Learn how industry-advancing AI agents in **Vault CRM** can position medtech organizations for success.