

A Day in the Life: Field Teams and AI Agents As Collaborators

AI agents are changing how field teams work, tackling practical, high-impact activities that contribute to healthcare professional (HCP) relationship management. More than task assistants, AI agents in [Veeva Vault CRM](#) understand commercial processes and compliance rules to become collaborators and create efficiencies. With direct and secure access to shared data, content, and insights, the AI agents promote coordination across sales, marketing, and medical teams.

01

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:

Turn **100+ signals** into a Hot List of the top five opportunities.



02

Guided pre-call preparation

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 a 20-page PDF into **three key talking points**.



03

Post-call: automated, compliant logs

VOICE AGENT

FREE TEXT AGENT



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



Deep, industry-specific AI agents embedded in Vault CRM unlock the full potential of field teams. With more AI capabilities and enhancements on the way, Veeva AI agents are becoming true collaborators of the field force, increasing productivity and customer centricity.

Learn how key advantages of Vault CRM, including embedded industry-advancing AI agents, position biopharmas of all sizes for long-term success

[Learn More](#)