

Agent Advantage™ for Salesforce

The *Sales Agent* supports the Sales Rep in Opportunity Management, greatly reducing their manual efforts.

BUSINESS CHALLENGE

Customers increasingly expect personalized experiences with product recommendations tailored to their needs. Meanwhile, sales reps often spend significant time searching through multiple documents such as contracts and agreements—to determine eligible offers. This manual process across various systems slows down the sales cycle.

AGENTIC SOLUTION

The Sales Agent coordinates between the sales rep, reducing their workload by handling the data creation in the platform, collating all the relevant data points such as existing contracts and sales agreements, and identifying the relevant rebates/offers that the sales rep can provide to the customer based on their customer segment.

VALUE PROPOSITION



Increased Efficiency

Easy and fast collation of various documents such as contracts and sales agreements enables a more efficient sales process



Reduced Manual Effort

Highlighting the key elements of each opportunity helps sales reps minimize time in the system and reduces manual tasks.



Improved Sales Rep Experience

Less time spent on data entry and collating allows reps to spend more time selling to potential customers

AGENT CAPABILITIES



Opportunity Management

Provides a clear summary of the opportunity for sales reps, ultimately helping advance it through its stages.



Provide Customer Summary

Collate and summarize key customer information such as their sales agreement, contract and past orders



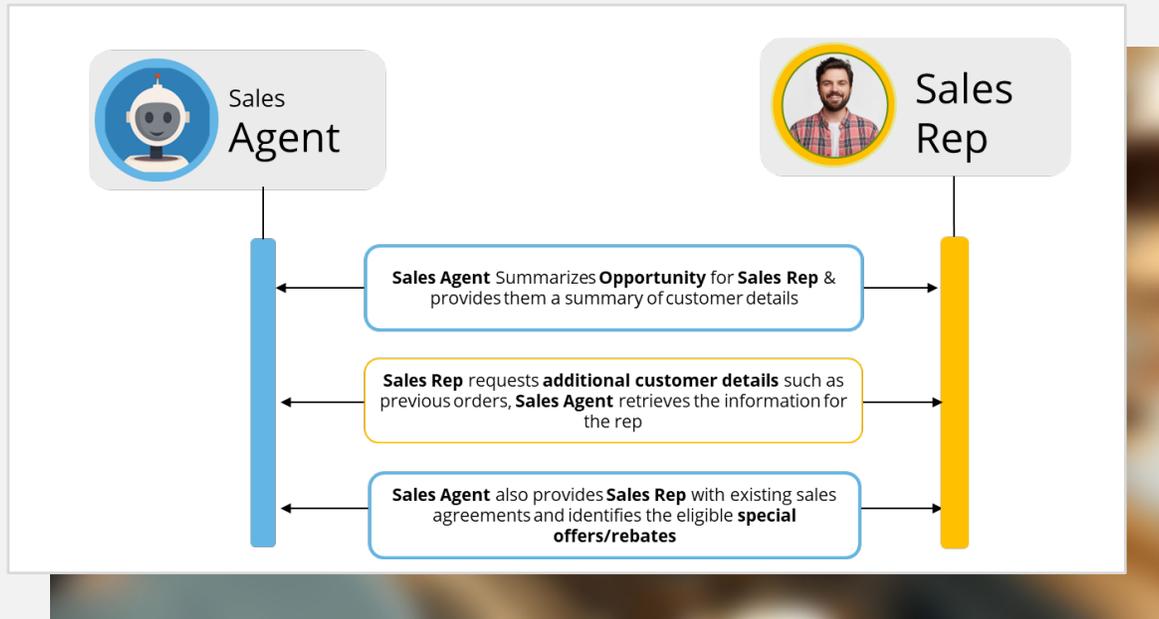
Identify Customer Offers

Provide rep with the available rebates* and special offers for a specific customer based on their segment and service level



Manage Order Updates

Engage with customer to manage Order updates, proactively updating delivery methods to help ensure timely fulfilment



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