



AI under the Hood of Pharma CRM



How visit history, Rx trends, GeoForce data and contact frequency help pharma sales reps decide who to visit, when to act and how to move each HCP relationship forward

A practical playbook for pharma leaders who want to understand how **AI** can turn field signals into clearer daily decisions.

From visit records and remote visit transcriptions to territory coverage, contact frequency, Rx trends and **HCP** engagement, this guide explains how **Proxima Cloud CRM** can help field teams improve visit planning, make conversations with healthcare professionals more relevant, strengthen follow up discipline and give managers earlier visibility into field execution.



Why AI in pharma CRM has to start with field decisions

Pharma companies are investing in **AI, CRM** platforms and analytics. Field teams have more data than ever. But in many organizations, the most important decisions still happen under pressure: in the morning before the first visit, between appointments, or right after a conversation with a **healthcare professional**.

*Who should the rep visit first? Which **HCP** needs follow up today? Which account is showing early signs of risk? Which opportunity is becoming visible in the territory?*

These questions define daily field execution. They also reveal one of the biggest challenges for **pharma CRM**: data is available, but the next action is not always clear.

AI becomes valuable when it helps reduce that distance.

Why AI in pharma CRM has to start with field decisions

A **pharma sales rep** does not need another screen full of disconnected information. The rep needs a clearer way to understand what changed, what matters now and which action can move the **HCP** relationship forward.

This playbook looks under the hood of pharma CRM to explain how AI can help turn field signals into decisions that are clearer, faster and easier to act on.

The decision gap in pharma CRM

Most **CRM** systems in **pharma** are good at keeping records. They capture visits, store activity, organize contacts and give managers a view of what happened. That matters. But field execution depends on something more difficult: helping the rep decide what to do next while there is still time to act.

The gap appears when **CRM** data is available, but the decision still depends mainly on habit, memory or personal interpretation.

A rep may know the territory well. They may understand the healthcare professionals they visit. They may have strong commercial intuition. But no person can manually process every signal across visit history, contact frequency, Rx trends, remote visit notes, **HCP** engagement and geographic coverage every day with the same speed and consistency.



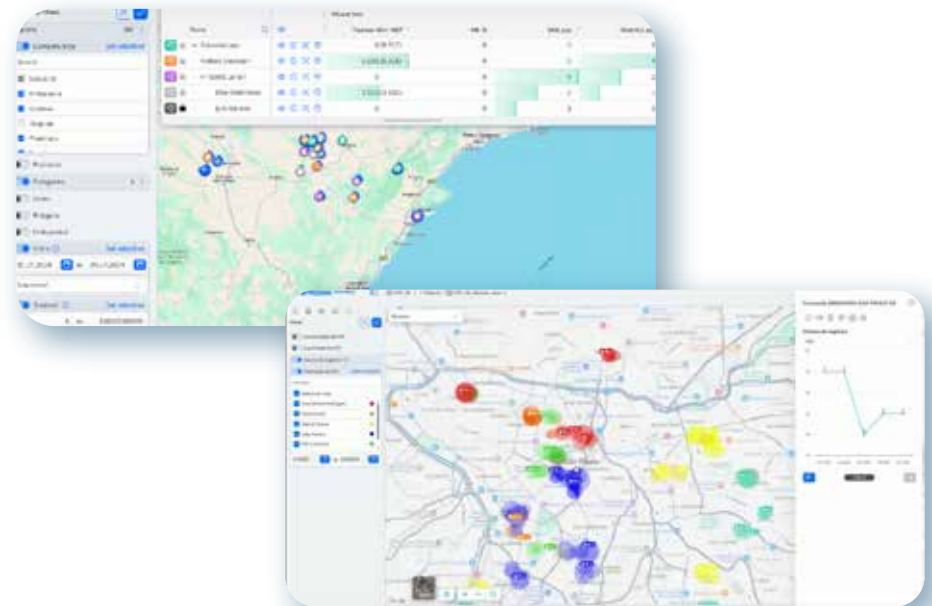
This is where AI starts to create practical value

The goal is to reduce the distance between a signal and an action. AI can help organize information, detect patterns and suggest a next step. The rep still brings judgment, relationship context and the ability to adapt the conversation.

For **pharma** leaders, this changes the role of **CRM**. The question moves from activity control to decision quality.

A stronger **CRM** environment helps answer practical field questions:

- ✓ What changed in the territory?
- ✓ Which HCP needs attention now?
- ✓ What should the rep do next?
- ✓ Why does that action matter?
- ✓ How can managers see risk earlier?



When **CRM** starts helping teams answer those questions, it becomes more than a repository of activity. It becomes a practical layer for better field execution.

From CRM as a record to CRM as an advisor

For years, **CRM in pharma** has been treated mainly as the place where field activity is stored. A rep completes a visit, adds notes, updates the account and moves to the next healthcare professional. The information becomes useful for managers, reports and performance reviews. But the rep often receives little support at the moment when the next decision has to be made.

That is the real maturity challenge.



From CRM as a record to CRM as an advisor

A **pharma CRM** can hold a large amount of information and still leave the field team with too much interpretation work. A dashboard may show visit frequency, territory coverage, activity levels or campaign engagement. Those signals matter. But if the rep still has to open several views, connect the dots manually and decide alone what to do next, the **CRM** is informing the user rather than guiding the workflow.

A practical way to understand this shift is through three levels of CRM maturity:

LEVEL 1: ———

CRM as a recording system

At this level, **the CRM** answers one basic question: **What happened?**

The system captures completed activity. It records visits, notes, contacts and tasks. This creates a history of the relationship with healthcare professionals and gives the organization a formal record of field execution.

The value is clear: the company gains visibility. The limitation is also clear: most of that visibility comes after the action already happened.

The rep may finish the week with data in the CRM, but during the week many decisions are still based on memory, habit or personal experience.

LEVEL 2: —

CRM as an analytical system

At this level, the **CRM** helps answer: **What is happening?**

Dashboards and analytics make patterns easier to see. Managers can review coverage, frequency, activity levels and field performance. Teams can compare territories, spot gaps and understand where execution is moving in the right direction.

This is an important step. But it still depends heavily on human interpretation.

The system shows the picture. The user decides what the picture means. For a manager, that may be possible during a planning meeting. For a rep standing between visits, it can be too slow.

The result is a familiar gap in pharma field execution: the data exists, but the next action is not always clear.

LEVEL 3: —

CRM as a prescriptive advisor

At this level, the **CRM** helps answer: **What should we do next, and why?**

This is where **AI** begins to create a more practical kind of value. A prescriptive **CRM** can use field signals such as visit history, **Rx trends**, **GeoForce** data, contact frequency, remote visit transcriptions and **HCP** engagement to suggest the next best action.

That recommendation becomes valuable when it is specific.

The rep does not need a vague alert. The rep needs to know which **healthcare professional** deserves attention, why that **HCP** matters now, what action makes sense and how that action connects to the account context.

For example, the system may identify that an **HCP** has rising Rx potential, lower recent contact frequency and a relevant response to a previous campaign. In that case, the next action may be a visit with a clear objective.

LEVEL 3: —

CRM as a prescriptive advisor

In another account, the system may detect declining responsiveness and a missed follow up. That may call for a different action.

The point is simple: AI creates value when it shortens the distance between signal and decision.

In pharma, this maturity level still keeps the human in control. The rep brings judgment, relationship context and the ability to adapt the conversation. The manager brings coaching and commercial direction. The AI layer helps organize signals, explain patterns and recommend actions inside the workflow.

For Proxima Cloud CRM, this is the direction of prescriptive **CRM**: helping field teams move from reviewing information to acting with better context.

What field signals can AI use?

AI in pharma CRM becomes useful when it works with signals that already exist inside the commercial operation.

These signals are not abstract. They come from the daily work of the field team and the systems around it.



Visit history

Past visits show how often the **HCP** was contacted, what was discussed and whether the relationship is progressing.

Visit history can help identify patterns that are easy to miss when each interaction is reviewed separately. It can show if an account has received enough attention, if the relationship has lost momentum or if the next visit needs a more specific objective.





Remote visit transcriptions

Remote conversations can contain valuable information, but that value is often lost when the rep has to summarize everything manually after the interaction.

When remote visits are transcribed and structured, the **CRM** can capture outcomes, agreements and next steps with less manual effort from the rep. This improves data quality and makes the information available faster for managers, analytics and future AI recommendations.



Rx trends

Rx trends can help identify where attention is needed, where opportunity is rising or where performance is changing.

For a field team, this can support better prioritization. A rep can understand which **HCPs** or accounts may require action, which changes deserve attention and where a conversation may need to be adjusted based on what is happening in the territory.



GeoForce data

Territory execution is also a geographic challenge. Reps need to understand where time is being spent, which areas are receiving enough coverage and how routes can be planned with better context.

GeoForce data can help connect field activity with territory visibility. This allows teams to identify coverage gaps, improve planning and support better use of field time.



Contact frequency

Contact frequency helps detect whether an **HCP** is receiving the right level of attention.

If frequency is too low, the relationship may lose momentum. If it is poorly timed, the conversation may arrive too late. When this signal is connected with visit history, Rx trends and **HCP** engagement, it can help guide a more relevant next action.



HCP engagement

Interactions with content, campaigns or previous touchpoints can help the rep prepare a more relevant conversation with the healthcare professional.

HCP engagement gives context. It helps the rep understand what the healthcare professional has seen, how they have interacted and which topic may deserve attention in the next conversation.

When these signals are connected, the CRM can move from showing information to guiding the next field decision.

Human, process and machine: the operating model

AI creates value in pharma when it supports the system around the field team.

The strongest model connects three elements: human judgment, disciplined process and machine intelligence.



Human judgment

The human part matters because pharma relationships depend on trust.

A sales rep understands tone, context, clinical conversation and the reality of each healthcare professional. **AI** can support preparation, but the relationship remains human.

The rep still decides how to open the conversation, how to respond to the **HCP**, how to adapt the message and when to escalate an opportunity or a risk.



Disciplined process

The process part matters because **AI** needs structure.

If visit outcomes are incomplete, if follow up is not captured, if reps describe the same event in different ways, the system receives noise instead of usable information.

A strong **CRM** process creates the foundation for better **AI**. It defines how activity is captured, how outcomes are structured, how follow ups are recorded and how field signals become reliable inputs for decision support.

This is the operating principle:

Machine suggests. Human decides. Field execution improves.

That principle is especially important in **pharma**. It keeps accountability with the team while giving reps better support in the moments that shape field execution.



Machine intelligence

The machine part matters because no person can process every signal across a full territory at the same speed.

AI can help rank accounts, detect early risk, identify opportunity and recommend a next action with reasoning. It can support the rep before the visit, during planning and after the conversation, when follow up needs to be captured quickly.

Quick readiness check

Before expecting **AI** to create real field value, pharma leaders should ask four practical questions:

- ✓ 1. Are visit outcomes structured, or are they written as loose notes?
- ✓ 2. Do reps capture similar events in a consistent way?
- ✓ 3. How quickly is visit data available for analytics and AI?
- ✓ 4. Who owns data quality inside the organization?

These questions matter because prescriptive **AI** depends on the quality of the operational foundation. If the data is incomplete, inconsistent or delayed, recommendations will be weaker.

AI works better when the process behind it is ready.

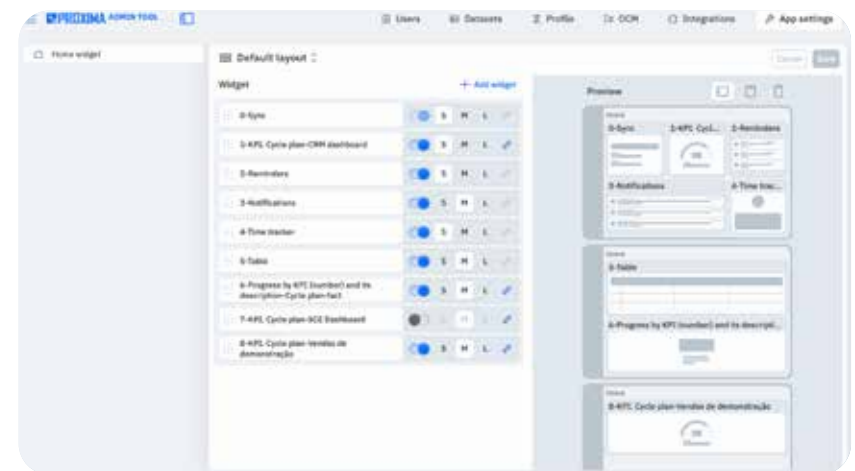
The best AI in pharma starts before the algorithm

The future of **AI in pharma CRM** will be defined by the quality of the operational foundation behind each recommendation.

A recommendation is only useful when the system understands the field reality well enough to make it relevant.

That means structured visit records, consistent follow up habits, clear territory data, reliable contact frequency and signals that arrive in time to support action.

This is why the move toward prescriptive **CRM** starts before **Smart Assistant**, before advanced recommendations and before any **AI** layer becomes visible to the rep. It starts with the way the organization captures daily field activity and turns it into usable context.



For pharma leaders, the real question is practical:

Can your **CRM** environment help reps make better decisions while they are still in the field?

- ✓ A stronger foundation helps the entire commercial team.
- ✓ Reps can plan visits with clearer priorities.
- ✓ Managers can see risks earlier.
- ✓ SFE teams can understand how execution patterns connect to results.
- ✓ Omnichannel teams can align digital signals with personal engagement.
- ✓ CRM and IT teams can support a more connected workflow without adding extra complexity for the field force.

Proxima Cloud CRM is designed to help pharma teams build that foundation today. It connects field activity, territory visibility, analytics and commercial execution in one environment, with capabilities such as **MDM integration, remote visit transcription, CRM autofill, GeoForce** and **Power BI analytics**.



Smart Assistant is part of the **Proxima Cloud CRM** roadmap as the next maturity step. Its purpose is to help pharma sales reps prioritize **HCPs**, understand why a recommendation matters and act with better context inside their daily workflow.

The insight is clear: **AI** becomes more valuable when the operation is ready for it.

The companies that structure their field data, discipline their processes and reduce friction now will be in a stronger position to benefit from prescriptive **CRM** when the next layer of AI becomes available.



Talk to Proxima Research to explore how **Proxima Cloud CRM** can help your pharma field team build the operational foundation for smarter **HCP engagement**, stronger follow up discipline and better visibility across the territory.

Schedule a 30 minute conversation to see how Proxima Cloud CRM can support your current CRM needs and help your team prepare for the next stage of AI assisted field execution.