



No More Admin Burden with AI-Powered Field Sales Teams

Maximize sales efficiency & drive
stronger CRM adoption on the go

donna.
www.askdonna.com

Contents

Introduction

Relationships Still Win Deals	1
Today's Sales Tools Aren't Build for the Field	2
Poor Data, Poor Decisions	5
The Power of Conversation in Field Sales	6
Meet Donna: The Real-Time AI Assistant for the Field	10

Introduction

Sales has always been a people business. But in 2026, it's also a tech business, and for many teams, a time-crunch business too.

We live in a new sales reality, shaped by economic pressure and evolving customer expectations. Sales reps are expected to hit higher targets, but the support systems haven't evolved fast enough to meet their needs, especially for those in the field.

Most modern sales tools were built for virtual selling - not face-to-face conversations. But countless teams still close deals in person, build trust across the table, and forge relationships on the ground. So while technology has delivered a revolution for inside sales, field sales are still often stuck juggling notebooks, apps, and after-hours admin marathons.

And the industry's answer? More dashboards. More tools. More workflows. Ironically, that only adds layers to the problem, turning sales reps into app-switching acrobats, trying to stay focused while chasing after their next update prompt.

So the question is, what if AI didn't just promise efficiency but delivered it? What if it met sales reps exactly where they are – in motion, in meetings, and in the moment? This is exactly what [Donna](#) solves.

Relationships Still Win Deals

It's easy to assume that in a world of e-commerce, video calls, and AI-generated emails, the role of field sales would be less important. But the opposite is true. As digital noise increases, in-person connection becomes a strategic advantage.

Even the most sophisticated digital funnels can't replace the impact of a well-timed hand shake, a face-to-face meeting, or the instinctive judgment call that comes from reading a room. Field reps don't just sell products — they build partnerships. They gather unspoken feedback. They spot early signals of churn or opportunity that would never show up in an email thread.

And in many sectors, face-to-face selling isn't just preferable — it's essential. Companies selling insurance, physical goods, complex systems, or site-dependent services - from industrial tools and construction equipment to machinery,

medical devices, and manufacturing supplies - need reps on the ground. Products must be demonstrated live. Specs must be aligned with physical realities. Sellers in these environments can't rely on virtual selling alone. They need to see the space, read the customer, and understand on-site challenges firsthand.

Some field sales reps spend their days moving rapidly between many clients — think pharma reps visiting hospitals and clinics, or account managers dropping in at cafés and retail locations. Others may have fewer meetings but dive deep into complex discussions, like consultants or insurance brokers handling high-value, high-stakes deals.

What unites them all is constant movement, shifting priorities, and the need to stay sharp without a stable desk or quiet office.

In industries where trust, nuance, and relationship depth matter, field sales remains the front-line — bridging the human gap that traditional digital solutions can't close.



Today's Sales Tools Aren't Built for the Field

Sales Tech is Booming, Field Sales are Drowning

Let's be honest: most CRM systems weren't designed for sales reps who work on the go. They were built for the desktop, not the driver's seat.

Ask any manager how their field sales reps spend their day, and you'll hear about carefully planned schedules: client visits at set times, neatly documented in CRM. Ask the reps themselves, and you'll hear a different story. In the real world, field sales isn't neat or predictable. Meetings run over. Spontaneous walk-ins happen. Private time between appointments gets eaten up by unexpected calls or urgent follow-ups. No two days ever look the same.

So what happens? Sales reps make do. Out in the field, many sales reps are still relying on scribbled notes, WhatsApp chats, and last-minute memory recall. They jot down notes on the dashboard, log calls long after they've happened, and fill in "required fields" with just enough to pass compliance checks.

And it's not just time that's lost — it's efficiency. After a full day of selling, the mental burden of trying to remember every customer detail adds cognitive strain that erodes sharpness and consistency.

Most Field Sales Managers know this — many were reps themselves, after all — and are well aware of the day-to-day unpredictability. The real challenge for them lies in visibility and support: they can't easily see what's happening on the ground, they can't join most meetings (ride-alongs are costly and time-consuming), and that makes it harder to coach, train, or step in when needed.

Traditional tracking and reporting tools only widen the gap, since they're built around a structure that often doesn't reflect reality.

Sales reps spend less than 28% of their time actively selling.

The remaining time is allocated to various non-selling tasks like data entry, administrative work, and deal management.

Source: [Salesforce](#)

Six Threats Slowing Down Field Sales

Sales on the go isn't just about being mobile — it's about adapting to a wide range of selling environments, often within a single day. Meanwhile, the shift toward hybrid sales is accelerating. McKinsey reports that 85% of companies expect hybrid selling - part in-person, part virtual - to become the dominant model in just a few years.

In a digital world, the high-context, in-person moments are more valuable than ever — but they're also more expensive, more time-sensitive, and harder to scale without the right support, and come with their own set of challenges:

- 1. Unpredictable schedules make planning tough.** Reps deal with unexpected calls, urgent client requests, and hop-in visits that disrupt even well-planned routes. Their day rarely goes as scripted, which makes real-time tracking and updates nearly impossible.
- 2. Inconsistent connectivity breaks momentum.** When reps lose access to cloud-based tools mid-day, it disrupts their workflow and forces offline workarounds that rarely make it into the CRM later.
- 3. Travel time kills productivity.** Reps spend hours behind the wheel between appointments — hours that can't be used for follow-ups, note-taking, or CRM updates without risking safety or distraction.
- 4. Follow-ups happen too late.** Time compression means reps often log their notes hours or even days after a meeting, relying on memory instead of immediacy. Critical context is lost before it ever makes it into the CRM.
- 5. Apps aren't built for the field.** Sales teams are expected to switch between calendars, CRMs, messaging apps, and email just to log one interaction. All through mobile interfaces that weren't designed for fast, on-the-go usage.
- 6. CRMs stay disconnected from rep reality.** Each rep develops their own system: voice memos, notes on dashboards, spreadsheets, or WhatsApp chats. None of it syncs cleanly with CRM, leaving gaps in visibility and lost insights for the

The result? Even top-performing reps end up spending more time managing systems than managing relationships.

Why CRM Fixes Don't Stick

Companies have tried all sorts of strategies to boost CRM adoption:

Some tweak the CRM itself, designing special workflows and customizations to make it “easier” for sales on the go. But in practice? These customizations rarely work as intended. They're tough to maintain, create IT headaches during migrations, and often add complexity instead of removing it.

Others roll out bonuses and incentive plans, hoping that a little extra cash will nudge behavior. While this can get reps to log some extra data, it doesn't solve the deeper issue: rushed, after-hours CRM updates are still inefficient, inconsistent, and far from valuable.

Then there are the learning lunches, breakfast sessions, and quarterly CRM trainings. You might see a short-lived spike in usage — a sugar high, basically — but the impact fades fast. It's a Band-Aid on a bullet wound.

Finally, some companies build their own, custom app. Sounds great, but in reality these apps are hard to maintain and quickly outdated without a dedicated development team. In contrast, a professionally developed product ensures ongoing updates, expert support, and a faster path to value—without the long-term risks and costs of going it alone.

This isn't a technology problem — it's a fit problem.

Sales reps cite time spent on manual data entry as one of their top challenges, with 72% saying they're overwhelmed by too many tools.

Source: [Salesforce State of Sales, 5th Edition](#)

Over the past 14 years of implementing CRM's for sales teams I witnessed one constant in an everchanging landscape; the low adoption by the reps in the field and the reluctance towards management systems.

Source: Deloitte

Poor Data, Poor Decisions

The Forgetting Curve

Cognitive science offers a clear warning for sales teams: if information isn't captured quickly, it's likely to be lost. The "[forgetting curve](#)" shows that people forget up to 50% of new information within an hour if it's not reinforced or recorded.

For field reps, that means the longer the delay between a client meeting and logging notes, the more context, detail, and nuance disappears. Not because reps aren't capable, but because human memory isn't built to retain high volumes of fast-changing information.

Without tools that support immediate, in-the-moment capture, companies risk losing critical insights before they ever reach the CRM.

The Cost of Bad Data

[Consider this:](#)

- Only 57% of field sales reps hit their quotas.
- Less than 28% of their time is spent on actual selling.
- 72% goes to admin, CRM catch-up, drive time, and internal back-and-forth.

Important details — competitive updates, customer complaints, buying signals — are often mentioned casually during meetings. Without easy ways to capture these in the moment, they vanish.

This is the core dilemma of field sales today: companies need high-quality, real-time data from the field to inform strategy, improve forecasting, and guide decisions — but collecting that data often comes at the cost of a rep's most valuable asset: time spent actively selling.

The more effort it takes to capture and structure insights, the less time reps have to build relationships and close deals. And yet, without that data, organizations fly blind.

Why AI Struggles Without Clean Data

There's a lot of buzz around AI agents promising to automate sales tasks, qualify leads, and even interact with customers. In theory, they could lift a huge burden off sales teams. But in practice, most AI agents depend on having clean, complete CRM data — something field sales teams often lack. Without a steady flow of high-quality inputs, these AI agents struggle to deliver meaningful outputs.

The challenge isn't a lack of tools. It's that most sales tech assumes clean, structured CRM data — and that's exactly what's missing. Many sales tools were designed with desk-based sales people in mind, relying heavily on structured CRM data — something that field teams, often working from their car or between meetings, simply don't have the time to maintain accurately. The result? Poor data quality, low adoption, and systems that fail both the rep and the manager.

The Power of Conversation in Field Sales

The Missing Link: Conversational Intelligence

Typing into a CRM system while on the move isn't efficient nor practical. Mobile keyboards, lagging apps, and tiny screens slow reps down instead of helping them move faster.

But what field reps can do, and prefer to do, is talk. Conversation fits naturally into the rhythm of a field sales day. Whether it's a voice note after a meeting, a quick chat to capture follow-ups, or hands-free input while driving, reps want tools that respond to the way they already work: fast, informal, and on their terms.

This conversational approach doesn't just mean having a natural phone call with your personal assistant. It also includes intuitive chat interactions, smart summaries from recorded meetings, and even guided workflows that feel like you're texting a knowledgeable assistant. When reps can work through conversation instead of data entries,

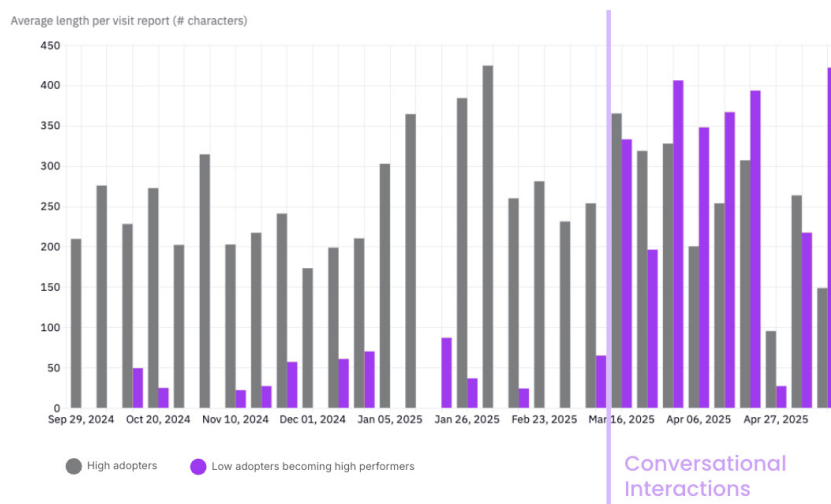
adoption rises, data improves, and friction disappears.

Conversational workflows dramatically improve CRM adoption and data accuracy — especially in the field, where time, context, and mental bandwidth are limited. Unlike basic “voice to CRM” tools, a conversational assistant preps reps before meetings, flags priorities, and suggests next steps. It's not just post-meeting admin — it's smart, proactive, and helpful throughout the day.

We've seen the same pattern again and again: reps who barely touched the CRM suddenly start logging 8x more data. Not because expectations changed, but because the experience did.

With the right technology — like [Donna](#) behind it — conversations can:

- Capture critical details as they happen, in voice, in chat, or in recap
- Organize unstructured input into structured insights
- Remove the admin burden that slows sales down



Meet Donna: The Real-Time AI Assistant for the Field

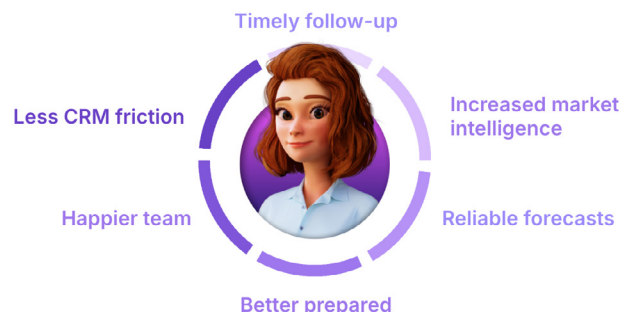
Designed for the Real World

For hybrid field reps, a smart assistant that understands conversation is more than a convenience. It's the missing link between selling in the real world and staying connected to systems that support growth.

Donna is a real-world field sales assistant, built for exactly this. She understands how reps move, speak, think, and adapt. Whether it's a hands-free voice interaction, a quick chat input, or a smart summary from a recorded meeting, Donna helps reps get information in, and value out, without disrupting their day.

Behind the scenes, she's built to handle real-life chaos: traffic noise, dropped words, café conversations, unscripted meetings. Every word Donna processes isn't just heard: it's understood in context, connected to CRM data, and organized into something useful.

Donna isn't just another app or dashboard to manage. She's a conversation partner. A field-native assistant. A system that listens, learns, and fits into the real way sales happens. No friction. No toggling. No need to "catch up later."



Here's How Donna Works:

Before the meeting: She gives you the necessary context (who you're meeting, what was last discussed, what to focus on).

During the meeting: She listens in (hands-free) and captures what matters.

After the meeting: She builds a summary, files it in the CRM, flags follow-ups, and highlights competitive or customer insights.

By improving CRM data quality and richness, Donna unlocks value far beyond her own role. Now, companies can activate the full potential of other AI tools, from advanced forecasting systems to smart sales enablement platforms like Microsoft Copilot and Salesforce's Agentforce.

Clean, structured, real-time data isn't just "nice to have" anymore: it's the foundation for making the entire AI ecosystem finally deliver on its promise.

Hi, I'm Donna!

The perfect assistant for sales teams on the go — **smarter, faster, always available**, and in every system, every meeting, every moment.



Maximize Sales Efficiency

Turn commute time into productive time
– reps **save up to 1 hour daily** to focus more on customers



Boost Sales Conversion

Cleaner data + reclaimed time lead to a **10–20% improvement** in follow-up quality and deal progression



Drive stronger CRM adoption

Reps talk. Donna logs. Capture up to **10x more data** — with **zero added effort**



**Curious what Donna could do
for your sales team? So where they.**



Talk to Donna here

or visit www.askdonna.com

donna.