



donna.

**Your perfect assistant**  
for field sales reps

[www.askdonna.com](http://www.askdonna.com)

The future of B2B sales...

Sales will focus on selling,  
AI will take care of the rest

# Challenges in B2B field sales

## Hours of non-sales time

- Long hours on the go (car, plane, conferences...)
- After-hours CRM data entry
- Endless follow-ups required

## Insignificant CRM adoption

- Unintuitive user interfaces
- Overly complex systems
- Time constraints

## Slow sales improvement

- Not enough time for sales coaching
- Lack of playbook compliancy

Limited time spent on actual selling

Loss of context in the organization (in case of team rotation)

Limited analytics and forecasting capabilities

Meet

**Donna, the perfect sales assistant**

for field sales reps



# Donna empowers sales teams before, during and after each interaction

Donna joins your calls / meetings

**BEFORE**

Donna sends briefings providing context before every meeting

**DURING**

**AFTER**

Donna calls you after your meeting and executes specific CRM workflows (e.g. create notes, tasks, update opportunities, draft follow-up emails...)

Donna schedules timely follow-ups for each opportunity.

# Donna ensures **accurate data capture** across your organization



## **CONSISTENT**

Donna retrieves CRM input from in-person meetings through a back-and-forth conversation



## **TAILORED**

Donna is trained to follow the company's sales playbook



## **COMPLETE**

Donna nudges the user if CRM input is incomplete

Donna directly **impacts** your top line  
and **reduces** the cost of sale



The background is a dark navy blue. A large, curved, lighter blue shape, resembling a stylized 'D' or a swoosh, starts from the top left and curves towards the bottom right, partially framing the text.

How does Donna work?



# How it works – before your meeting



Dynamics 365

Based on all previous interactions  
with Opportunity / Company /  
Contact



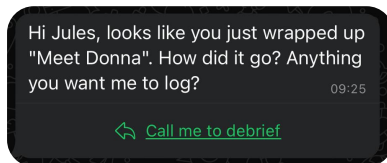
Donna briefs you **x minutes**  
**before** via voice note, email, text  
or call.

Fully prepared,  
ready to sell!

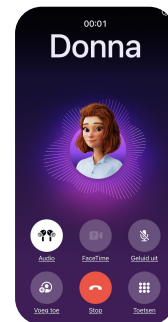
# How it works – after your **in-person** meeting



Your meeting/visit ends



Donna sends a notification to debrief via phone call



Donna ensures completeness by asking questions



Dynamics 365

Donna will log a case / create a task / log a conversation / create an opportunity...

**Any standard & Custom objects can be created or updated based on the conversation.**



Draft follow-up email in your inbox

# How it works – after your **online** meeting



Your meeting starts



Donna joins your online meeting  
and takes perfect notes



Your meeting ends



Dynamics 365

Note pushed to your CRM,  
linked to the right  
Opportunity/Company/Contact



Dynamics 365

Summary & full transcript of your  
online call



Draft follow-up email  
in your inbox

# Product vision: The Donna brain

Donna is **evolving** from your proactive Sales Assistant **to a proactive Sales Coach**. She will leverage data from across the entire sales team.

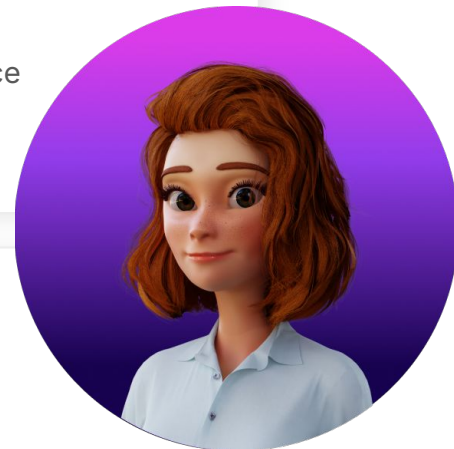
# The Donna brain

## For field sales reps

Utilizing her "Donna Brain", which is trained on all previous interactions with Donna, she will provide personalized, data-driven recommendations to enhance sales performance and effectiveness.

## For sales team leads

For sales leaders and team leads, Donna will also identify market dynamics, providing valuable insights and guidance to navigate and capitalize on market trends.



# Enterprise-grade security

As an AI-native, security-first company, our commitment to security and privacy is unwavering. Recognising the critical importance of safeguarding your data, we implement robust and industry-standard security measures to ensure your data is always secure.



AES-256 encryption at rest and TLS encryption in transit



Regular vulnerability scans and penetration testing




Hosted in the EU



Web application firewall and DDoS protection



Periodic risk assessment and security awareness training

Our models are **not trained with customer data**. Our platform and infrastructure are **in compliance with** the privacy and security practices of GDPR, ISO27001 and SOC2. Hosted in the EU .



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**Nicolas Christiaen**  
[nicolas.christiaen@askdonna.com](mailto:nicolas.christiaen@askdonna.com)



**Jonas Deprez**  
[jonas.deprez@askdonna.com](mailto:jonas.deprez@askdonna.com)

# donna.



[www.askdonna.com](http://www.askdonna.com)