

CX SUMMIT

2025

**NOVEMBER
2025**

Media-Soft HQ

6TH - 7TH NOVEMBER

Prepared by

MEDIA-SOFT

EVENT HIGHLIGHTS

**PLATFORM
UPDATES**

**CLM DESIGNER
TOOL**

**EXPLORING
MAESTRO AI**

**TEAM
COLLABORATION
WITH
WORKSPACES**

**ADVANCED DATA
ANALYSIS**

**ROUND TABLE:
“CUSTOMER
EXPERIENCE IN
ACTION”**

EVENT HIGHLIGHTS



OPENING BY CEO DAMIR SAFARIC

Together, we created something truly memorable — two days of learning, innovation, and meaningful connection that set the tone for the very first CX Summit. It brought together pharma professionals eager to explore and elevate customer experience, creating an atmosphere of real insight and collaboration. From AI-driven workflows to seeing Sales Vision AI CRM in action, every moment built on the last and kept the energy high. Thank you to everyone who joined us — your engagement made this experience meaningful and marked the beginning of a new tradition.

An inspiring start to the summit as Damir reminded us that technology should empower your commercial excellence strategy, not limit it.

Uplift presentation

Darko Mucić introduced Uplift and shared a few words about Media-Soft becoming part of Uplift as of August 2025.

The Future of Pharma CRM

Exploring the trends and technologies defining the next era of pharma CRM.

100%

Client satisfaction rate

40+

Industry professionals ready to connect & collaborate

48h

Of nonstop learning, networking & fun

PLATFORM UPDATES

iPad & Web Redesign

- iPad application redesign
- Web interface redesign
- New UI/UX components

Additional Modules

- MT to global approval
- Adoption Ladder
- Availability Module
- Contracts
- Line classification
- Anonymization
- Joint visit form
- Medical enquiry

Tips & Tricks

New features and enhancements:

- Status color coding
- Consent import
- Dual role
- Slider in the person list
- Face blur
- Force search on iPad
- Visit type restrictions and visit day restrictions
- Own data tab
- Customized browser update
- Digital products
- Delete from calendar via long press
- New native A-Z filter on persons and institutions
- Automatic product selection in MP
- Online user guides

AI in Sales Vision

- Ask module
- AI Filters & Analysis
- Routing AI
- Next Best Action
- Additional AI functionalities

BookVision and CLM Designer

- Introduction and walkthrough of the CLM Designer tool
- Creating and managing CLM materials

Maestro AI and Credo

- Overview of Maestro AI capabilities
- Practical applications
- Credo functionalities and processes

Marketing Journey Updates

- Campaigns & Waves
- SMS, Viber, WhatsApp
- Visit creation and tracking

Workspaces

- Managing teams
- Organizing and optimizing collaboration using Workspaces

Advanced Data Analysis

- Standard reports
- Report server
- SVMR
- Universal Dashboards
- All analytics-related features
- PowerBI interface

SALES VISION – EVOLVING THE FUTURE OF PHARMA CRM



85%

Users report improved navigation and faster task completion with the new interface



70%

Reduction in manual steps thanks to updated modules

As we wrapped up our deep dive into Sales Vision, we covered all key updates, new features, and enhancements designed to streamline workflows, improve usability, and elevate the overall customer experience.

Throughout the session, we walked through the refreshed platform interface across web and iPad, the redesigned navigation, improved data visibility, and new customization options that give users more control than ever before.

We explored major module updates — including Segmentation & Targeting with its approval-based workflow, the enhanced Availability and Contracts modules, Line Classification, Joint Visit Forms, and the GDPR-compliant anonymization/deanonymization functionality.

Each of these improvements contributes to a more structured, compliant, and efficient way of managing field operations and customer data.

We also introduced the powerful CLM Designer Tool, which brings all-in-one content creation directly into the CRM, allowing users to design, edit, and publish interactive CLM presentations without switching tools or needing technical skills.

Finally, we presented Maestro AI — our intelligent, GenAI-driven engagement platform for HCPs, offering secure access to materials, events, chatbot interactions, messaging, and real-time analytics that support smarter decision-making.

Together, these updates showcase how Sales Vision continues to evolve into a fully integrated, AI-supported environment that simplifies daily work, enhances communication, and empowers teams to operate with greater speed, precision, and confidence.

NEW FEATURES & FUNCTIONALITIES



As part of our full overview of Sales Vision, we also presented a wide range of new features and system functionalities designed to improve efficiency, strengthen compliance, and streamline field operations across the platform. Below is a summary of everything introduced in this release.

We started by showcasing the new Import of Consents, enabling HCP consent uploads via a predefined Excel template directly in the Admin platform.

We then introduced the Dual-role functionality, allowing users to switch between Sales Representative/Regional Manager and Administrator roles with a single login. This enhancement simplifies daily work for hybrid users while maintaining strict role-based access.

The update also brings several usability improvements, including the new Digital Products module, an A-Z native filter in Persons and Institutions, calendar visit deletion via long press, and visual indicators for inactive statuses.

Additional enhancements such as automatic product selection in the Marketing Plan, Force Search improvements on iPad, and the privacy-focused Face Blur feature help teams work faster and more securely.

We highlighted the powerful Marketing Journey module, supporting multichannel personalized communication across email, SMS, WhatsApp, and Viber, complete with Brevo integration for advanced analytics, campaign structuring, and dynamic keywords for personalization.

The release also introduces improved tools for Visit Creation & Tracking, as well as Workspaces, enabling teams to collaborate more effectively through shared spaces, document uploads, discussions, deadlines, and visual progress tracking.

Finally, we walked through the expanded Advanced Data Analysis capabilities — including standard reports, KPIs, dashboards, DataView, Universal Dashboards, BI Cube, and AI-powered analytics — offering deeper insight into performance, behavior, and strategic planning.

Together, these new features significantly elevate the Sales Vision ecosystem, empowering users with greater flexibility, faster workflows, stronger analytical capabilities, and more impactful communication tools across the entire CRM environment.

ROUND TABLE: “CUSTOMER EXPERIENCE IN ACTION”

Hosted by our CEO Damir, this interactive session explored real-world applications of CX strategies.

A special thanks to all participants for their valuable contributions!



During our round table session, together with our clients, we explored the key themes shaping the future of pharma field engagement, the evolution of AI in CRM, best practices from real-life field experience, and the roadmap for the next generation of Sales Vision. Each discussion brought valuable insights grounded in everyday challenges, strategic priorities, and emerging industry trends.

We examined how hybrid and digital models are reshaping the medical representative role, and how teams can balance personal interaction with automation without losing the human element. Our conversation on AI went beyond the buzzword — focusing on real value: predictive insights, next-best-action recommendations, responsible use of GenAI, and smarter CLM content creation.

Clients shared their experiences from the field, highlighting which CRM features bring the most impact, the common pain points they face, and what helps drive user adoption. These practical insights are essential for understanding what truly works in daily operations.

Finally, we looked ahead and discussed what the next chapter of Sales Vision should be. From mobility and seamless integrations to advanced analytics and AI-driven decision support, the collective feedback from our clients will guide how we shape the platform's future.

This round table once again confirmed the strength of our partnership: by co-creating, listening, and planning together, we ensure that Sales Vision continues to evolve in ways that bring real, measurable value to users across every market.