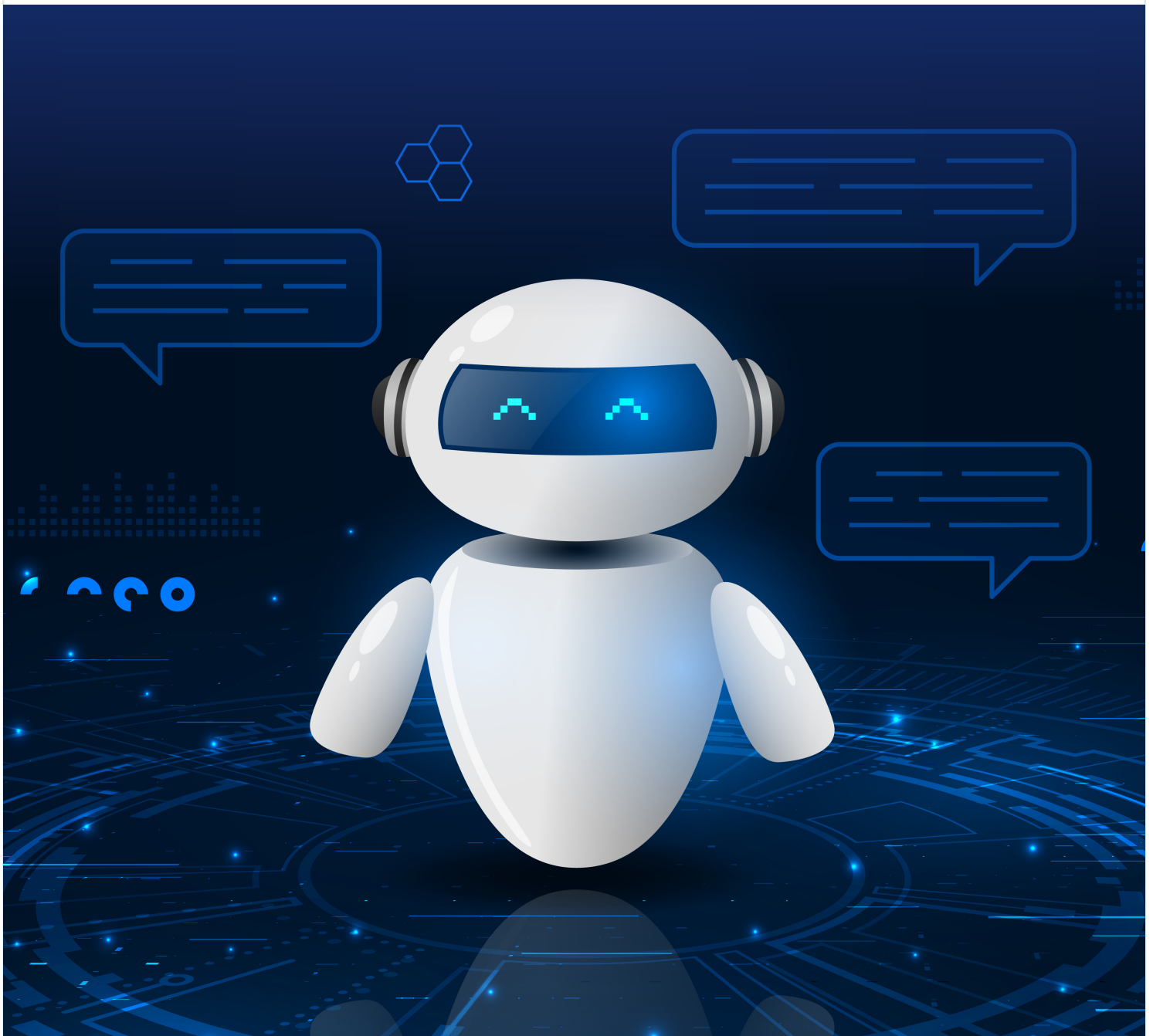


From Information to Intelligence

How SalesBuddy Helps Sales Teams Have Better Conversations

An Ahana use case on applying Generative AI to everyday sales work



Sales teams today already have a lot going for them. They have skilled people, detailed customer data, and strong product knowledge. What they need is a way to bring all of this together at the exact moment of a customer's conversation. SalesBuddy, an AI-based sales assistant built by Ahana, does this. It reads customer data, understands what the salesperson is asking, and gives ready-to-use guidance during the conversation itself. It also takes care of routine work like CRM updates and call summaries. The result is a team that spends less time searching and more time building relationships, with better productivity and stronger engagement.



Understanding the Sales Environment

Most sales teams are well-equipped. They have a CRM full of customer records, a product catalogue they know well, and experienced people who understand how to sell. Every piece needed for a good conversation is already present.

The opportunity lies in how these pieces come together. Customer information sits in one system, product details in another, and past conversation history somewhere else. When a salesperson is on a call, going through each of these takes time, while the customer waits for a clear and confident answer.

At the same time, customers now expect conversations that feel personal and prepared. They want the salesperson to understand their needs, remember their history, and speak to their situation directly.

So, the question is not about adding more data or more tools. The team already has these. The question is about adding a layer that connects everything and presents the right information at the right moment. This is the gap Ahana set out to address.

The Customer Conversation Where Preparation Meets Opportunity

The value of all this preparation shows up in one place, the live conversation with the customer. This is where the sales person needs to know who they are speaking to, what the customer is likely looking for, and how to position the product for that need.

In a typical setup, the sales person prepares before the call by reading through different systems, and writes notes after the call to update the records. The conversation in the middle depends on how much they can recall and find quickly. A layer that brings the right information forward during the call, and handles the record keeping after it, would let the sales person give full attention to the customer. This is the layer Ahana focused on building.



From Data Expertise to Generative AI for Better Sales Conversations

Ahana has spent years helping businesses turn complex data into clear decisions through Intelligent Automation and Business Intelligence. This experience shaped how we approached the sales problem.

When we studied the need closely, one point stood out. Every sales conversation is different. The customer, their questions, their concerns, and the right way to respond change each time. A system built on fixed rules and set scripts works well when situations are predictable. Sales conversations are not predictable in this way.

This is why we concluded that Generative AI is the right approach for this problem. Generative AI does not simply pick a saved answer from a list. It reads the customer's data, understands the meaning behind an open question, and puts together a response that fits the exact situation. It can write a fresh pitch for a particular customer, shorten a long history into a few useful points, and reply to questions in plain language.

In short, the problem needed a system that could think through each situation, not one that could only follow steps decided in advance. Our background in data and automation told us that Generative AI was the technology suited to this need.

How SalesBuddy Solves It Across the Conversation

SalesBuddy is an AI based sales assistant that works alongside the team through the full flow of a conversation. It connects to the systems the team already uses, brings their information together in one place, and supports the sales person before, during, and after every customer interaction.

What SalesBuddy does at each stage

- **Before the conversation:** Gives real-time customer insights such as purchasing habits, past behaviour, and account history, so the salesperson understands the customer's likely needs and can plan the direction of the call.

- **During the conversation:** Creates personalised sales pitches written for that specific customer, so the message stays relevant. It's an in-built chatbot that also lets the sales person ask questions in normal language and get instant answers, whether it is a product detail, a current offer, or a point from the customer's history.
- **After the conversation:** Completes routine work by writing the call summary and updating the CRM automatically, keeping records accurate and saving the salesperson from manual effort after every call.

Architecture and Technology Behind SalesBuddy

SalesBuddy is built on a modern and scalable technology base, designed to fit into the systems a business already runs.

The core of the solution uses Python along with Generative AI, which together handle the reasoning and the content creation. The application the team uses is built on current web technologies such as Next.js, which keeps it fast and simple to use. The whole solution runs on cloud services, so it can grow as the business grows without being rebuilt.

SalesBuddy is also designed to connect with the CRM and other systems the team depends on. The information flow is straightforward. Customer data comes in from the connected systems, the AI works through it to prepare guidance, this guidance reaches the sales person during the conversation, and the updates flow back into the CRM after the call. This keeps SalesBuddy practical to adopt, adding a new layer of intelligence without asking the business to replace what already works.

The Sales Workflow Before and After SalesBuddy

The difference SalesBuddy makes is easiest to see when we follow how a sales person works through a single conversation.

Stage of the conversation	Without SalesBuddy	With SalesBuddy
Preparing for the call	Checks several systems one by one to gather customer and product details	Customer insights and history are ready in one place before the call begins
During the call	Responses depend on what can be recalled and found at that moment	A tailored pitch and instant answers are available as the conversation happens
Answering questions	Pauses to search for product details or offers	Questions are answered straight away through the in built chatbot
After the call	Notes and CRM updates are done by hand, often later in the day	Summaries and CRM updates are completed automatically
Focus of the sales person	Time is shared between selling and supporting tasks	Most of the time goes to the customer and the relationship

Conclusion

Sales teams already have the people, the data, and the products they need to do well. SalesBuddy adds the layer that brings these together and makes them useful in the moment that matters most, the conversation with the customer.

By moving from a reactive way of working to a proactive one, teams respond faster, speak more relevantly, and focus on building lasting relationships. This is the shift SalesBuddy supports, and it is built on Ahana's experience in turning data into decisions.

ABOUT AHANA SYSTEMS

Ahana Systems and Solutions is a digital transformation and IT services company delivering modern data platforms, cloud and infrastructure services, automation, analytics, and governance capabilities across industries including Banking and Finance, Insurance, Manufacturing, Automobile, Logistics, Healthcare, and IT/ITES.

Ahana works with 100+ clients, has delivered 500+ projects across 20+ technologies, and is powered by a team of 650+ professionals. The company is a NASSCOM member and is certified for ISO 9001 and ISO 27001, with a focus on secure, scalable, future-ready technology delivery.



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