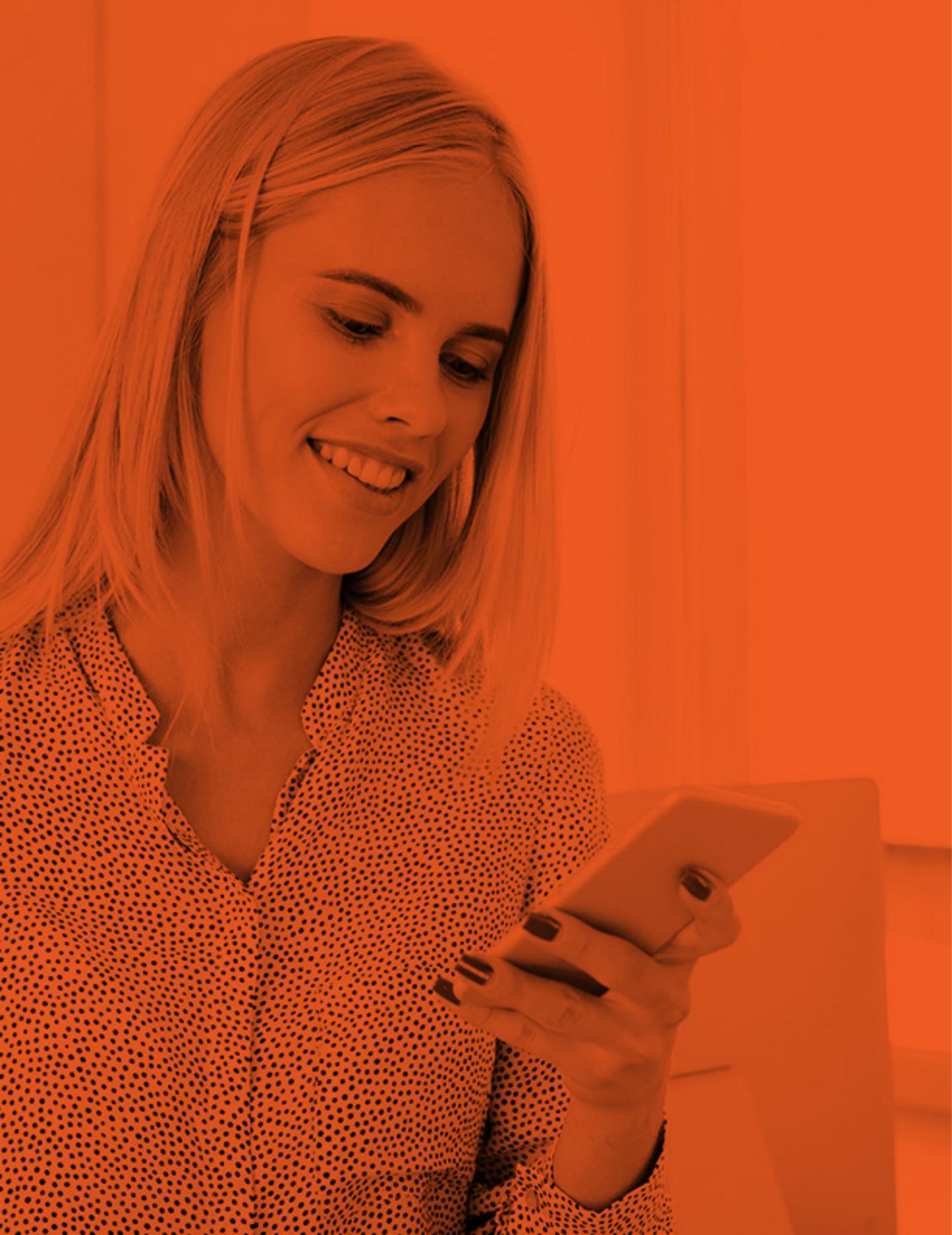


tact.ai

**AI Sales  
Assistant.**



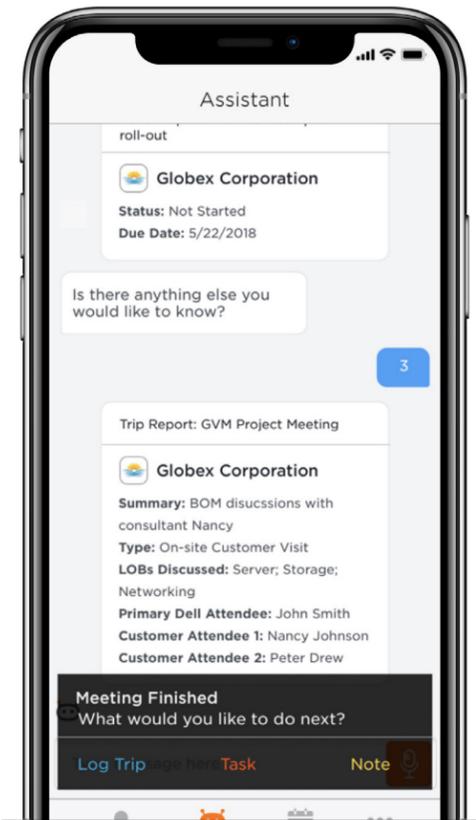
## What if every seller in the world had a personal assistant?

The Tact.ai Assistant equips every seller to accelerate their customer flow through a human-friendly touch, text, and voice experience. It replaces the need to go to separate apps, automates manual data entry, and taps sellers on the shoulder with the right intelligence in context at the right time. Tact.ai eliminates wasted time and enables reps to be top performers using the power of AI.

“Tact has a massive impact on work flow, selling execution, and ultimately success”



**Brian McCarthy**, Cisco

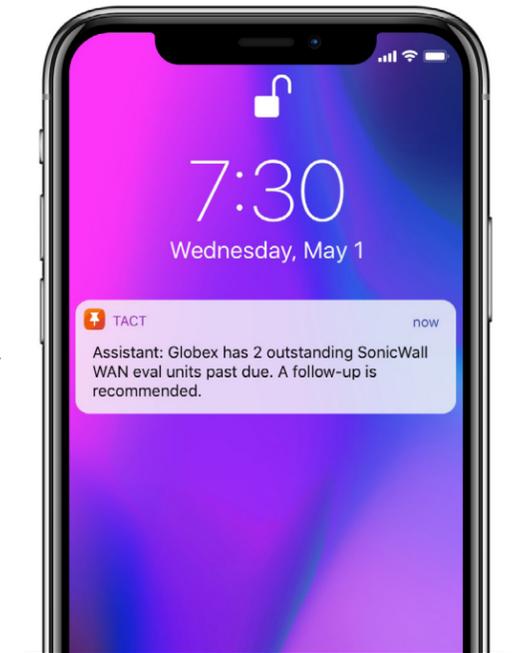


### Human-friendly AI assistance

The Assistant initiates and engages in natural language conversations, provides intelligent insights just before customer interactions, and logs activities to CRM (e.g. calls or meetings). It seamlessly adapts to the natural cadence of sellers, enabling them to stay in their daily flow for maximum productivity.

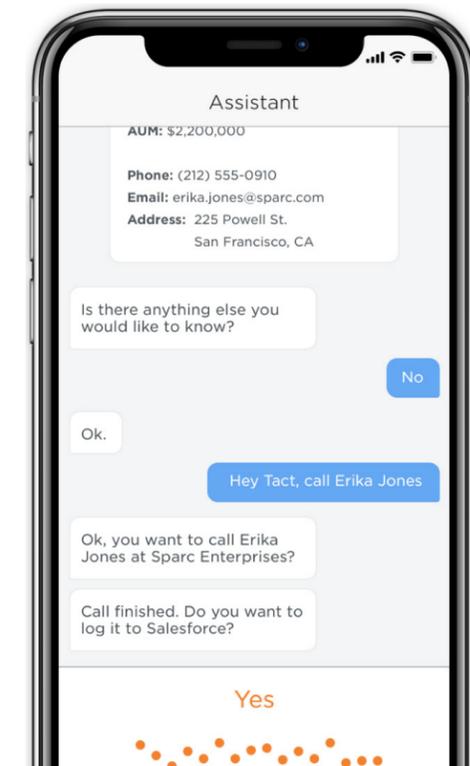
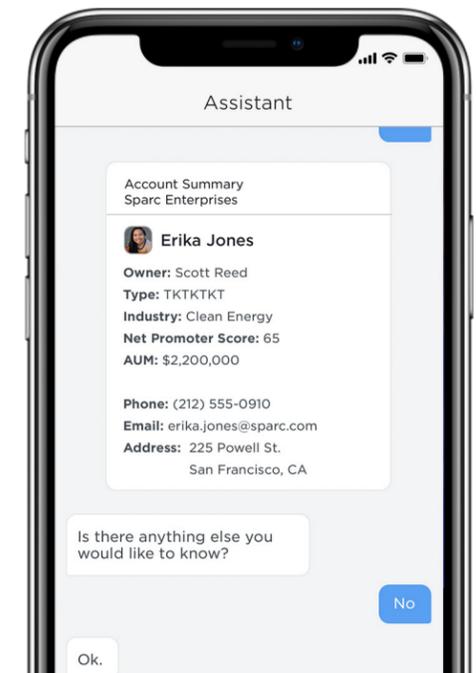
### Contextual push intelligence

The Assistant pushes contextual insights to sellers and other members of the deal team. This includes changes in Accounts (such as key contact attrition or drop in customer health score) or changes in the market (such as key competitor moves). Insights can be pushed before or after meetings or other event triggers.



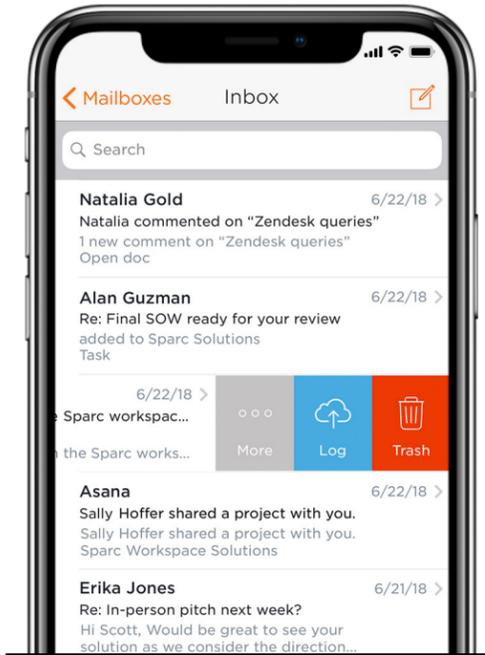
### True 360° insights across systems

The Assistant provides an integrated customer view by bringing together data across Contacts, Accounts, Opportunities, Email, Calendar, LinkedIn, and other sales and marketing databases. It also works 100% offline. With Tact's patented sync architecture, users can update contacts or opportunities even without cellular connection or WiFi.



### Conversational voice intelligence

The Assistant goes beyond traditional commands to bring a natural conversational voice experience for sellers. It adapts to seller's context to provide a seamless voice experience on mobile, in-car, and other edge devices including the Amazon Alexa and Microsoft Cortana.

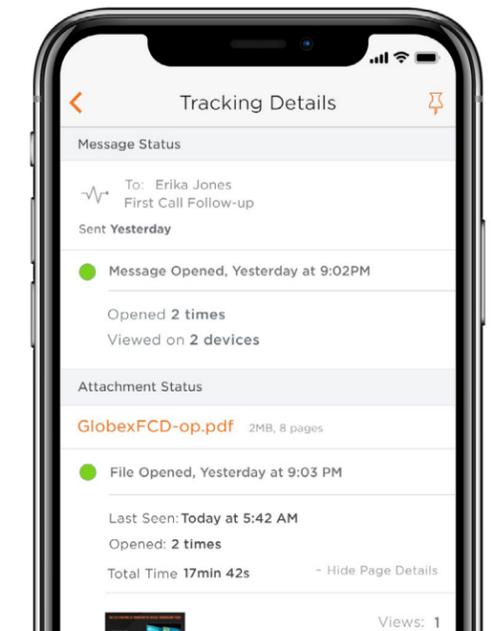


### Fully integrated inbox experience

The Assistant brings salespeople a rich inbox experience with a Priority Inbox that automatically prioritizes emails from high-value prospects. It also enables 1-tap logging to CRM, quick Contact and Account creation, follow up tasks, and note addition.

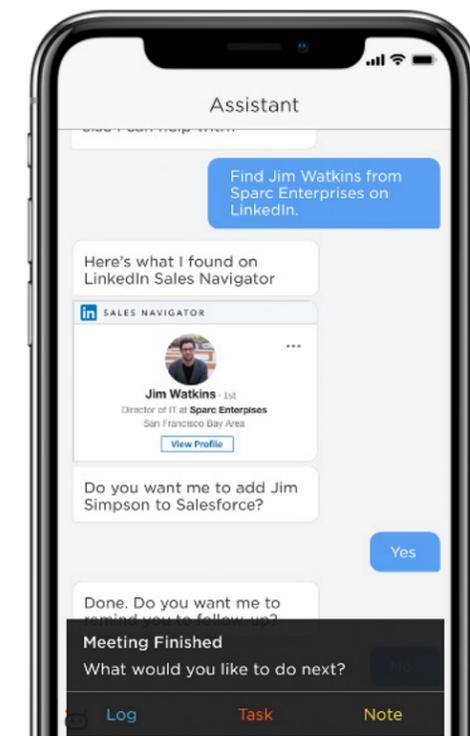
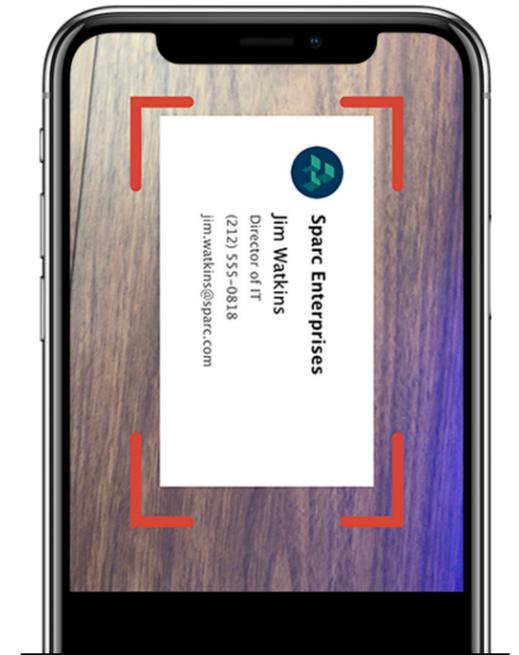
### Content engagement tracking

The Assistant helps salespeople engage better with customers and prospects through robust content tracking capabilities, providing notifications when emails are viewed, as well as page level insights for attachments such as collateral, close plans, and proposals.



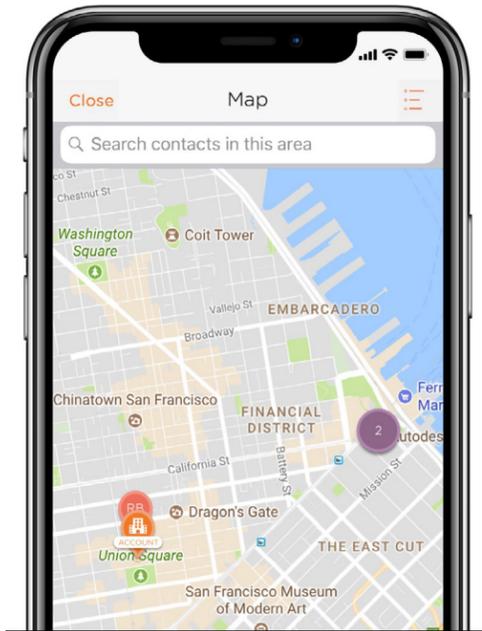
### Business card scanning

The Assistant uses the same advanced OCR technology that banks use to take photos of business cards and instantly convert them into new contacts in CRM with all fields automatically captured. The Assistant also deduplicates contacts.



### Golden 5 minutes activity logging

The Assistant logs sales activities including calls, meetings, and emails to CRM systems immediately after an activity is completed, along with notes and action items. This post-activity logging in the “Golden 5 minutes” ensures only the freshest data is captured into CRM.



### Location intelligence and route planning

The Assistant provides sellers visibility to nearby customers including Leads, Opportunities, and Custom Objects. It includes a visual territory map and access to location services, enabling sellers to get the most of their time in the field through follow-ups and meetings.

### Alexa for Business integration

The Assistant also includes out of the box integrations with voice platforms such as Amazon Alexa for Business. Sellers can access the Tact.ai Assistant in conference rooms, offices, and even Alexa at home to have multi-step, natural language conversations with CRM.

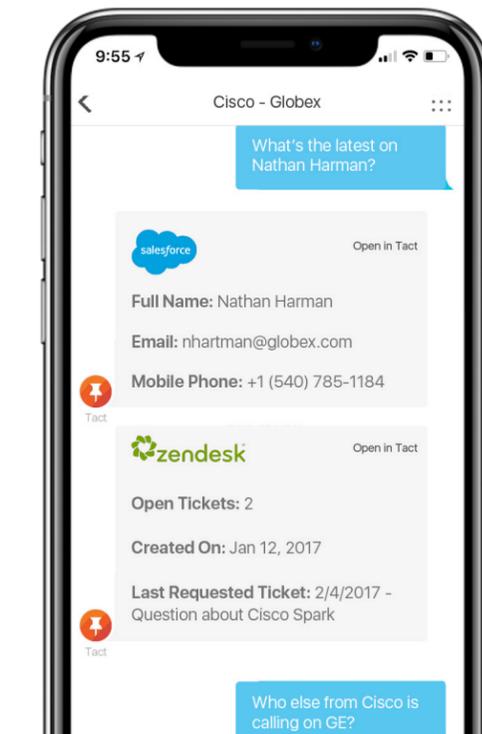
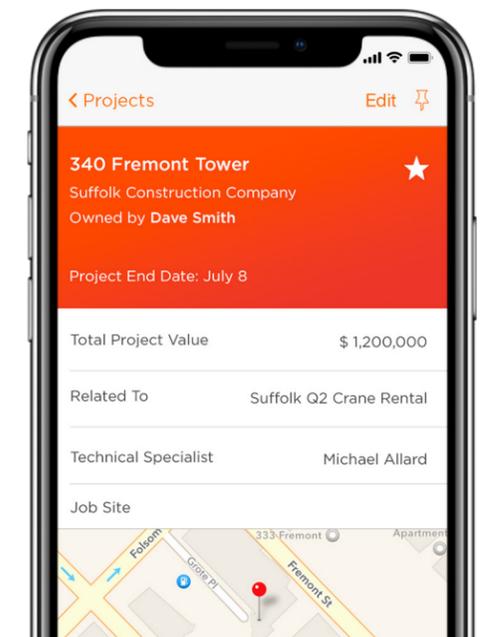


Alexa, ask Tact to remind Michael to follow-up with Lisa at Globex next week.

Alexa, ask Tact to move the Globex deal to Negotiation stage.

### CRM updates to custom objects

The Assistant supports conversational and mobile updates to both standard and custom Salesforce objects. It can extend to existing objects such as Opportunities as well as new ones for e.g. Trip Reports, Locations, or Projects.



### External workspace integrations

In addition to existing as an embedded capability in the Tact.ai Workspace, the Assistant can also be integrated to work with 3rd party workspaces such as Cisco WebEx Teams or Microsoft Teams.



Amazon Web Service, KMS

### Enterprise grade security

The Assistant is designed with strong data retention and isolation policies. It has its own single tenant database in a multi-tenant environment. It also uses Amazon's Key Management Service ("Bring Your Own Key") enabling IT administrators to have a unique encryption key per tenant. Additionally, the Assistant supports Single Sign-On.

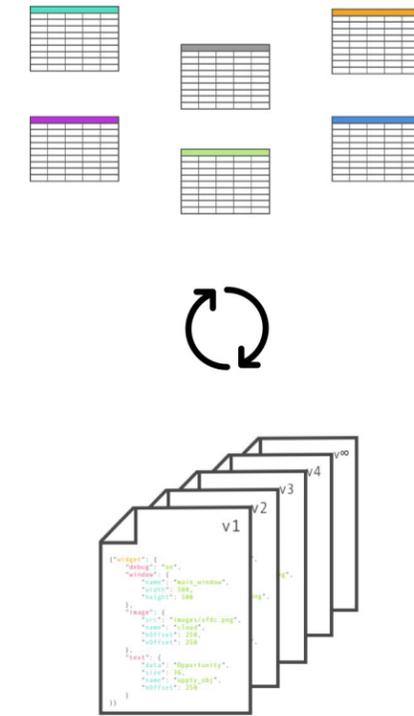
### Compliance and certifications

The Assistant was built with the most updated enterprise-grade compliance certifications including GDPR, ISO 27001, PCI, and the Cloud Security Alliance. Additionally, the Assistant has a 90-day data retention policy and rigorously tested in-house and with 3rd party penetration testing.



### Patented sync architecture and customization support

Tact.ai has a patented architecture to support user-specific syncing with a generic connector framework. The Assistant automatically syncs CRM metadata including object, field, and layout definitions and validation rules. Tact.ai also supports org-specific relevancy rules with metadata overrides.



### Mobile device management integrations

The Assistant integrates with Mobile Device Management (MDM) systems such as MobileIron and AirWatch allowing IT administrators to do remote wipe, provisioning, de-provisioning, and device and application management.



## Our Customers



## Our Investors



## Our Mentions

“What’s so special about Tact.ai?

Two words: voice recognition.”

**Forbes**

“Using Tact quickly can raise the likelihood of salespeople putting data into apps like Salesforce.”

**WSJ**

“Perfect storm of AI and edge computing to help sales”

**Bloomberg**

## Our Awards



For more information contact us at [nofriction@tact.ai](mailto:nofriction@tact.ai)