

# INDEX

## Efficient sales documentation with the AI assistant from VoiceLine

INDEX shows how AI can modernize technical field sales: with VoiceLine, customer visits are documented instantly via voice and automatically structured in SAP C4C. Field sales teams now create reports twice as fast, increase CRM data quality, and reduce administrative workload. Within less than a month, the AI assistant was seamlessly integrated – establishing a strong foundation for more efficient, data-driven sales operations.

### About INDEX Werke GmbH & Co. KG

Headquartered in Esslingen am Neckar, INDEX Werke, with its brands INDEX and TRAUB, is one of the world's leading manufacturers of CNC turning machines. With six production sites, 13 international sales and service subsidiaries, and a broad dealer network, the company operates in around 80 locations worldwide.

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About INDEX

The Challenge

The Solution

Equipping sales with modern AI tools is a key component of INDEX's digitalization strategy. Especially in field sales, precise and timely

documentation of customer conversations is crucial – and this is exactly where VoiceLine comes in.

## The Challenge

Like many high-performing field sales teams, INDEX sales representatives spend a large portion of their working time at customer appointments or traveling.

Previously, documentation of these interactions was manually entered into the SAP C4C v1 CRM system – a time-consuming process that was usually completed later in the office. Creating the often lengthy and technically complex visit reports took up to 30 minutes and caused significant administrative overhead. The goal was therefore clear: **more time for customers, less time spent on data entry.**

## The Solution: VoiceLine AI Assistant Integrated into SAP C4C



### Seamless Integration in Record Time

In less than one month, the VoiceLine AI Assistant was fully integrated into INDEX's existing SAP C4C v1 CRM system – without interrupting ongoing operations.



### Voice-Based Documentation in Field Sales

Since then, the German field sales team documents customer visits simply by voice – directly while on the go. Whether via the VoiceLine app or by calling the Conversational Assistant, visit reports and notes are created within minutes and can later be finalized with minimal editing.



### Automated Structure, Precise Results

The key advantage of VoiceLine: Important information from customer conversations no longer gets lost in the hectic sales routine. Immediately after the meeting, details are captured via voice and transmitted to the Conversational Assistant. The AI automatically structures reports and follow-up tasks, so regional

sales managers only need to review and finalize them. This ensures that data is captured precisely when it is still fresh.

### **Success Factor: Continuous Learning**

A crucial success factor is the ongoing optimization of the AI – particularly in terms of technical vocabulary and report structure. Through close collaboration between Alexander Fobke (Team Lead Digital Marketing at INDEX) and the VoiceLine Customer Success Team, the assistant is continuously refined. The result is speech recognition and structuring capabilities that already significantly outperform conventional dictation functions in terms of quality.

## Measurable Results

The implementation of VoiceLine has noticeably accelerated and improved the documentation process in INDEX’s field sales:



### **Efficiency Increase**

Field sales representatives now create reports and follow-up tasks twice as fast as before.



### **Data Quality**

The number of CRM entries has increased significantly, strengthening the data foundation for sales management.



### **Work-Life Balance**

Mobile documentation reduces time-consuming follow-up work in the evening, noticeably relieving the team and creating more room for value-adding sales activities.

The result: Field sales not only saves valuable time but also improves the timeliness, consistency, and overall quality of CRM data – providing a stronger foundation for better-informed decisions and more efficient sales operations.

## Outlook: Scaling and New Features

In close cooperation with the VoiceLine Customer Success Team, INDEX is driving the next steps of innovation:

- **Enhanced CRM Logic:** In the future, new contacts can be created directly via VoiceLine, including business card scanning.
- **International Rollout:** The AI Assistant will be implemented beyond Germany in additional countries.
- **Data-Driven Sales:** The expansion of VoiceLine Analytics will enable sales leaders to gain real-time insights into relevant field data.

The objective is clear: foster stronger alignment between sales and leadership in order to derive new strategic impulses directly from reliable data.

## Conclusion

**AI as a productivity driver:** The collaboration with VoiceLine makes sales documentation at INDEX smarter. However, success is not based on technology alone – effective change management plays a key role. “The first step has been taken to establish AI in sales. It represents an entirely new way of working,” summarizes INDEX.

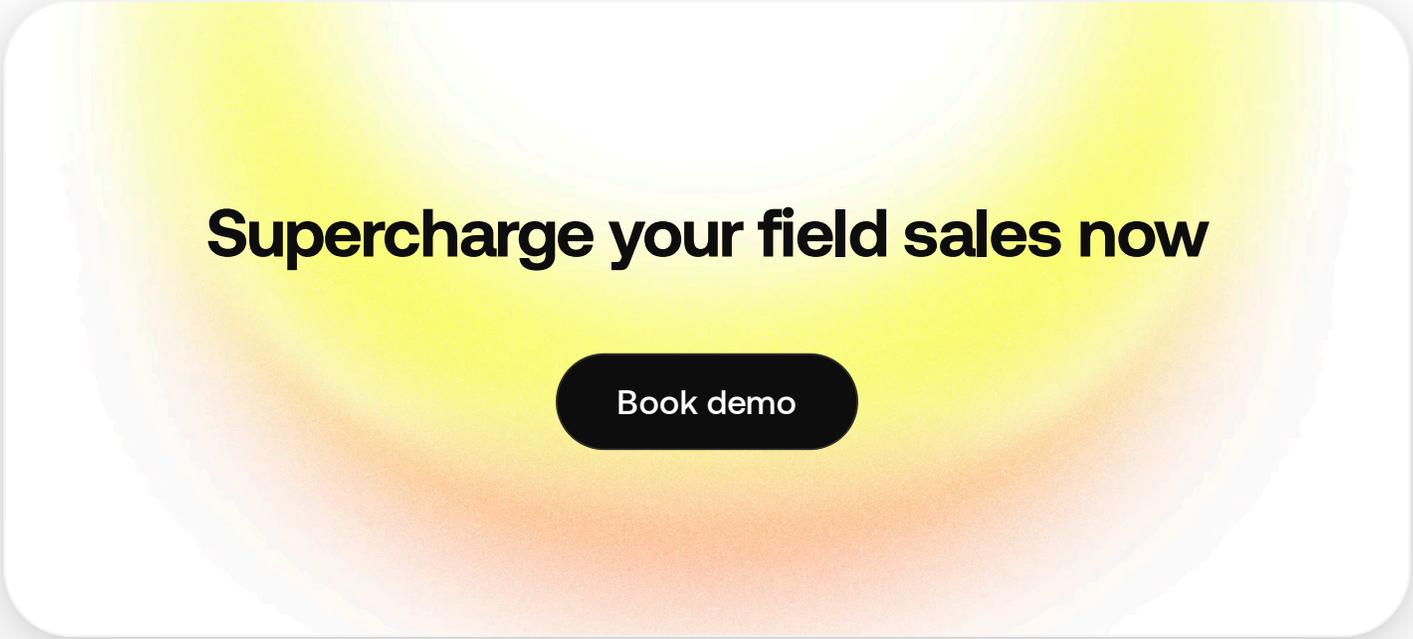
Although broad adoption within the team is still progressing, many employees are already using the system intensively. Thanks to the adaptability of the AI and its deep CRM integration, a process has been established that significantly relieves the field sales team. VoiceLine thus creates the necessary freedom to focus on what matters most: personal customer relationships.

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