



COMPOUNDING PHARMACY
OWNER SUMMIT
MARCH 19-21, 2026 | AUSTIN, TEXAS

AI That Sells

Practical Tools to Grow Prescriber Relationships and Revenue

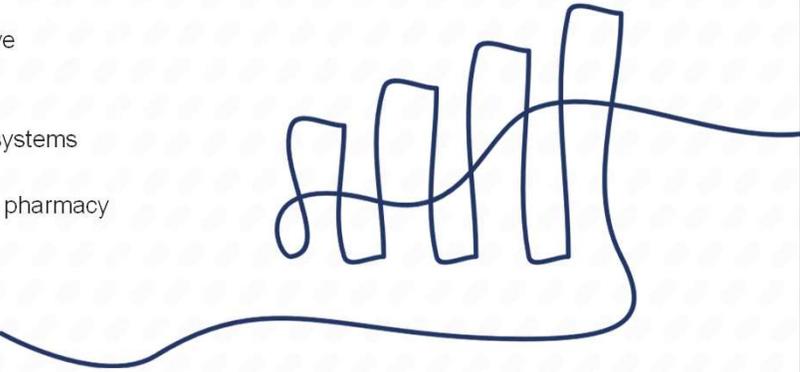
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Founder & CEO | *Atrium24 – Dotti CRM*

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The Reality of Pharmacy Growth

Growth rarely happens by accident

-  Most pharmacies rely on passive prescriber relationships
-  Few have structured outreach systems
-  Most sales data lives inside the pharmacy system but is never used



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Why AI Matters Right Now

Growth rarely happens by accident



AI can analyze patterns faster than humans



AI can personalize communication at scale



AI can turn raw data into sales strategy



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What is AI?

AI = machines mimicking human intelligence (learning, reasoning, language, vision) ←

Works best on clean, structured data ←



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What AI Actually Is

Timeline: From 1956 (Dartmouth Conference, term “AI” coined) → decades of hype cycles & “AI winters” → 2020s generative AI boom

- AI learns patterns in data
- AI generates text and insights
- AI automates repetitive workflows

The most useful categories for pharmacies are

Machine Learning ✓

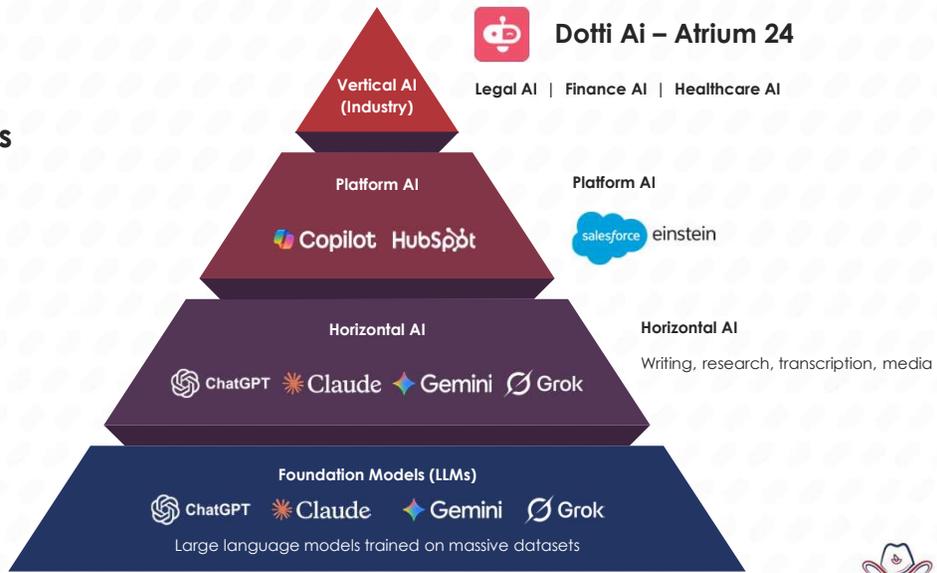
Generative AI ✓

Workflow Automation ✓



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The AI Stack: From Models to Industry Solutions



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AI Tools You Already Know

Text / Reasoning AI

- ChatGPT (OpenAI)
- Claude (Anthropic)
- Grok (xAI)
- Gemini (Google)

Speech / Audio AI

- Otter.ai (Otter.ai)

Media Generation AI

- Midjourney (Midjourney)
- Nano Banana (Google)
- Sora (OpenAI)

Workflow Automation

- IVR automation (Synerio)
- Data entry bots (EncoreRx, TJM Labs)

CRM Intelligence

- HubSpot AI (HubSpot)
- Salesforce Einstein (Salesforce)
- Dotti AI (Atrium24) – pharmacy specific AI CRM

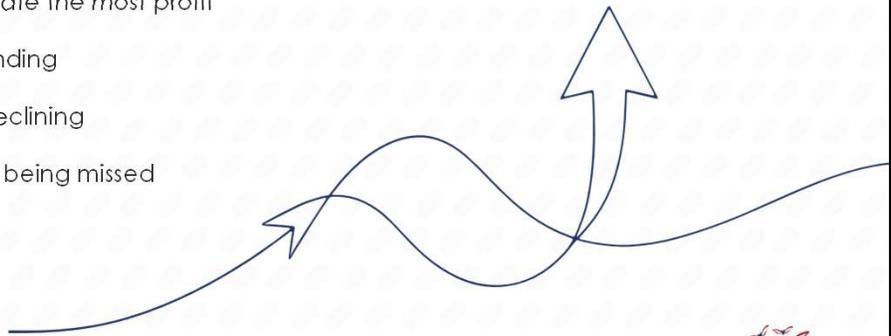


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The Sales Problem in Pharmacy

Most pharmacies don't know where their growth is coming from

- Which prescribers generate the most profit
- Which therapies are trending
- Which prescribers are declining
- Which opportunities are being missed



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AI for Physician Engagement

Tools you can use today:

ChatGPT Plus for prescriber outreach, Grok for fast prompts

Demo

Prompt ChatGPT → 'Write a professional email to a prescriber about our compounding expertise in dermatology'

Benefits:

saves time, consistent tone, scalable

Strategies:

be specific, review output for compliance

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AI for Operations & Analytics

Everyday AI tools:

- Fathom AI / Otter.ai → meeting transcripts
- Super Whisper / Whisper Flow → consult notes
- IVR/data entry AI → reduce cost-to-dispense

Challenge:

Consumer AI = manual exports + PHI risk

Solution:

Platforms like Dotti securely ingest nightly data feeds and clean them automatically

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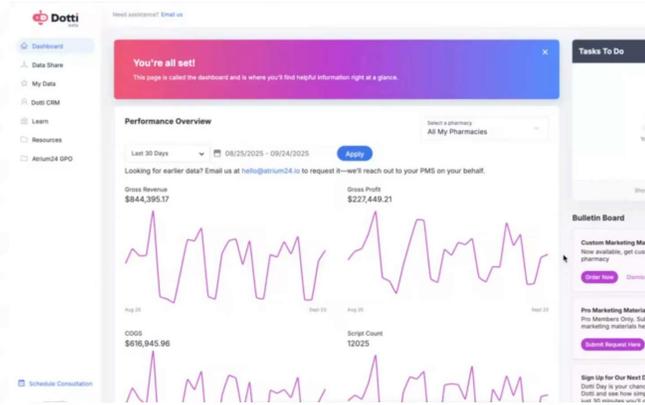
Demo Setup: Dotti + ChatGPT Workflow

Prescriber focus: Dr. James Howton

Dotti Dashboard shows: \$13K gross profit in recent scripts

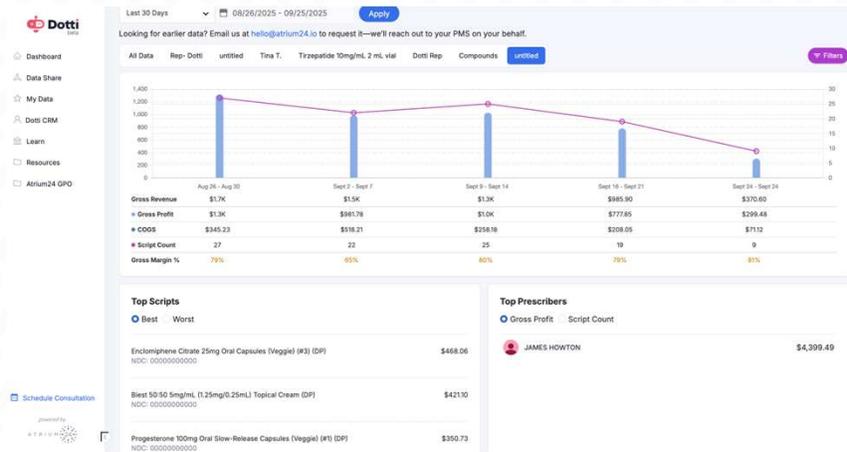
Top compounds: Biest creams, Progesterone, Testosterone, Enclomiphene

Transition → Let's use ChatGPT to turn this into outreach.



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Demo: Dotti Prescriber Data



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Demo: Detailed Prescriber Search

Drug Name	NDC	Gross Profit	Script Count
Enclomiphene Citrate 25mg Oral Capsules (Veggie) (#3) (DP)	0000000000	\$468.06	3
Bleist 50-50 5mg/mL (1.25mg/0.25mL) Topical Cream (DP)	0000000000	\$421.10	8
Progesterone 100mg Oral Slow-Release Capsules (Veggie) (#1) (DP)	0000000000	\$350.73	8
Bleist 50-50 3.75mg/mL (0.9375mg/0.25mL) Topical Cream (DP)	0000000000	\$299.81	5
Bleist 50-50 3.75mg/mL (0.9375mg/0.25mL) Topical Cream (DP)	0000000000	\$274.17	4
Progesterone 200mg Oral Slow-Release Capsules (Veggie) (#2) (DP)	0000000000	\$250.40	5
Progesterone 100mg/mL (25mg/0.25mL) Topical Cream (DP)	0000000000	\$221.90	7
Bleist 50-50 1.5mg/mL (0.375mg/0.25mL) Topical Cream (DP)	0000000000	\$200.80	3
Testosterone 24mg/mL (6mg/0.25mL) Topical HRT Cream (DP)	0000000000	\$120.43	7
Testosterone 200mg/mL (50mg/0.25mL) Topical HRT Cream (DP)	0000000000	\$105.69	2
Bleist 50-50 3mg/mL (0.75mg/0.25mL) Topical Cream (DP)	0000000000	\$99.14	2
Bleist 50-50 3.75mg/mL (0.9375mg/0.25mL) Topical Cream	0000000000	\$97.89	1
Ivermectin 20mg Oral Capsules (Veggie) (#3) (DP)	0000000000	\$93.12	2
Testosterone 10mg DHEA 75mg Pregnenolone 100mg/mL (2.5mg-18.75mg-25mg/0.25mL) Topical HRT Cream (ALDI) (DP)	0000000000	\$78.28	1
Bleist 80-20 2.5mg/mL (0.625mg/0.25mL) Topical Cream (DP)	0000000000	\$75.12	1
Testosterone 40mg/mL (15mg/0.25mL) Topical HRT Cream (DP)	0000000000	\$73.39	3
Bleist 50-50 7mg/mL (1.75mg/0.25mL) Topical Cream (DP)	0000000000	\$73.24	1
Bleist 50-50 7.5mg/mL (1.875mg/0.25mL) Topical Cream (DP)	0000000000	\$73.03	1
Estradiol 4mg/mL (1mg/0.25mL) Topical Cream (DP)	0000000000	\$66.04	1

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Demo: ChatGPT Outreach Draft

Prompt: Draft an outreach letter to Dr. Howton. He prescribes Bleist, progesterone, testosterone, enclomiphene. Suggest related compounded therapies he might be interested in.

Output: Email → thanks him, lists his focus, suggests related therapies (DHEA, oxytocin spray, LDN, thyroid SR).

Year to Date	01/01/2025 - 08/24/2025
Gross Revenue	\$877.30
Gross Profit	\$776.26
# of Comp	\$201.04
# Script Count	23
Gross Margin %	78%

Period	Gross Revenue	Gross Profit	# of Comp	# Script Count	Gross Margin %
Jul 1 - Jul 31	\$6.2K	\$5.0K	\$1.3K	10	80%
Jul 1 - Jul 31	\$6.2K	\$5.0K	\$1.3K	10	80%
Aug 1 - Aug 31	\$5.7K	\$4.5K	\$1.2K	10	78%

Top Prescribers

Prescriber	Gross Profit	Script Count
JAMES HOWTON	\$1,319.66	1
	\$1,205.13	1
	\$841.55	1

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Demo: Refined Outreach (Patient-Centered)

Refinement Prompt:

Make it shorter and focus on patient outcomes.

Output:

Concise, patient-centered version.



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Demo Takeaways



Dotti = secure, structured data



ChatGPT = fast, professional outreach drafts

Reminder:
never paste PHI/raw identifiers into ChatGPT

Together: strategy in minutes, not hours



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Natural Language + Workflow AI (Dotti Example)

Dotti (Atrium24) → CRM + AI analytics for pharmacies

Today:

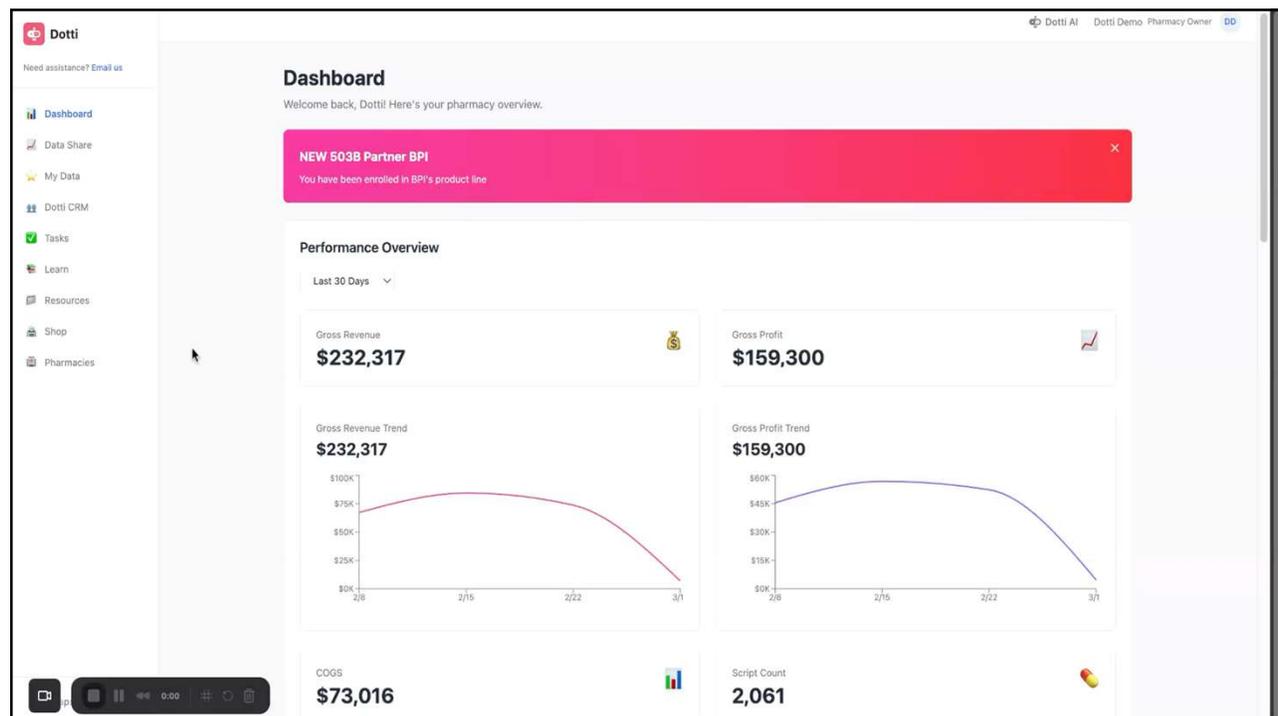
- AI-assisted development + MCP server (query SFTP + hidden DB info)
- Nightly ingestion of pharmacy sales activity data (dispensing + financials)
- Prescriber-level insights + public prescriber data enrichment
- Sylogic observability to ensure integrations stay reliable

Tomorrow:

- AI Copilot: conversational queries ('Which prescribers grew most this month?')
- Function calling/MCP for safe real-time data use
- Proactive sales enablement: high-value prescriber targeting, follow-up recommendations
- Expanded analytics: forecasting, reporting, patient-level CRM



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Natural Language + Workflow AI (Dotti Example)

Why this matters:

- Dotti already ingests, formats, and secures your data daily
- Easier lift vs. manually exporting/importing into nonsecure platforms like ChatGPT
- AI works immediately in a compliant, pharmacy-specific workflow



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Compounding the Joy of Living

 IMIT

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Why ChatGPT Plus Is Not a Secure Option

- Gives you GPT-4 + conversation memory, not private server access
- Your inputs are processed on shared OpenAI infrastructure
- Not HIPAA/PHI-safe – avoid uploading identifiable or prescription-level data
- Use ChatGPT Plus only for non-sensitive content (e.g., outreach drafts, marketing)



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Secure AI Options for Pharmacies

ChatGPT Enterprise / OpenAI for Business — stronger privacy, better controls, possible isolated instances



Private LLM deployment on cloud (AWS, Azure, Google) — you host model, control security boundaries



Self-hosted LLMs on-prem or in controlled cloud — maximum control, requires hardware + AI ops



Hybrid / MCP-enabled designs — AI can query data safely via secure protocols



Domain-specific SaaS with secure architecture — like Dotti, built for pharmacy data security and AI from the start



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Turning Data Into Sales Intelligence

Where AI becomes powerful

- Analyze dispensing trends
- Identify prescriber opportunities
- Detect profitable therapy categories
- Prioritize outreach



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Key Takeaways

- AI grows prescriber base (outreach + targeting)
- AI streamlines ops (IVR, transcription, data entry)
- AI improves profitability (product margin insights)
- AI drives discovery — pharmacies must adapt
- Foundation = clean, secure data

Reminder: AI feels new, but it's nearly 70 years in the making — today's generative AI boom is built on decades of progress



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Action Steps (This Week)

1. Try ChatGPT Plus (\$20/mo)
 - test prompts with non-sensitive data
2. Use Dictation / Recorder
 - streamline meeting notes
 - lighten documentation load
3. Explore workflow automation
 - IVR, data entry AI
4. Explore secure platforms like Dotti
 - avoid PHI risk
5. Track AI trends in pharmacy



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Let's Talk AI

Book a Call!



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