

# Achieving Customer Centricity with AI

*Solving the Challenge for Pharma Reps*



IN today's rapidly evolving life sciences landscape, the traditional model of sales engagement which has been in place for more than 70 years, is undergoing a significant transformation. Pharma reps are increasingly challenged by access for face-to-face interactions, necessitating a strategic shift. Reps must adeptly leverage multiple, often disconnected data sources to plan and prepare personalized, value-added interactions with customers. This requires a sophisticated understanding of customer preferences and brand strategy to deliver the right content through the most effective channels. AI, with its promise of accessible, faster insights, is an obvious solution, however organizations need to carefully examine and zoom in on the critical issues they are trying to solve for. Is it about automating the analysis and aggregating data

from complex data sources? Or surfacing the right content at the right time? Perhaps it's about future-proofing our teams and identifying gaps in skills and capabilities to address them efficiently?

In this whitepaper, we explore a common, and critical, industry challenge: "How can we make Sales Reps' planning and engagement activities more productive and effective in a compliant manner?" We dive into the various Veeva AI innovations that will solve many of these tasks and discuss the importance of identifying the right AI use cases to create value based on organizational needs. Finally, to reach this North Star of powering AI, we need a reliable, unified data to ensure consistency across commercial applications, eliminating silos and improving accessibility.

## The Importance of AI for Pharma

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AI is an increasingly important topic as we see technology and consumer needs evolve. This is no different in the pharmaceutical industry, which has started reaping the benefits of AI in areas such as drug discovery and optimizing clinical trials<sup>1</sup> especially in the APAC region which invests heavily in research and top talent<sup>2</sup>. But can AI play a meaningful role when it comes to commercial functions?

According to Andrei Newton from Boehringer Ingelheim, the change has already started: *"We will move to a new normal where AI is embedded in our way of working in commercial functions."* This is because AI offers new opportunities to enhance customer engagement, improve operational efficiency, and drive innovation. By leveraging the power of AI, organizations can gain deeper insights into customer behavior, personalize interactions, and automate time

consuming processes. Importantly, it may also mitigate growing challenges in access and customer experience.

For example, Veeva's [Pulse Field Trends Report](#), found that 70% of HCPs in Asia limit engagement access to three or fewer companies, and 40% of HCPs limit access to only one pharma company. With HCPs becoming more selective with the companies they engage with, the importance of **creating meaningful interactions** with HCPs across a connected sales, marketing, and medical model is more critical than ever.

So, can AI help Sales teams deliver relevant, timely, and needed content to HCPs? And to what extent? Veeva put this to the test in a recent series of workshops conducted with pharma leaders in Sydney and Melbourne.

<sup>1</sup><https://www.rws.com/industries/life-sciences/blog/AIs-Growing-Influence-in-APAC-Life-Sciences>

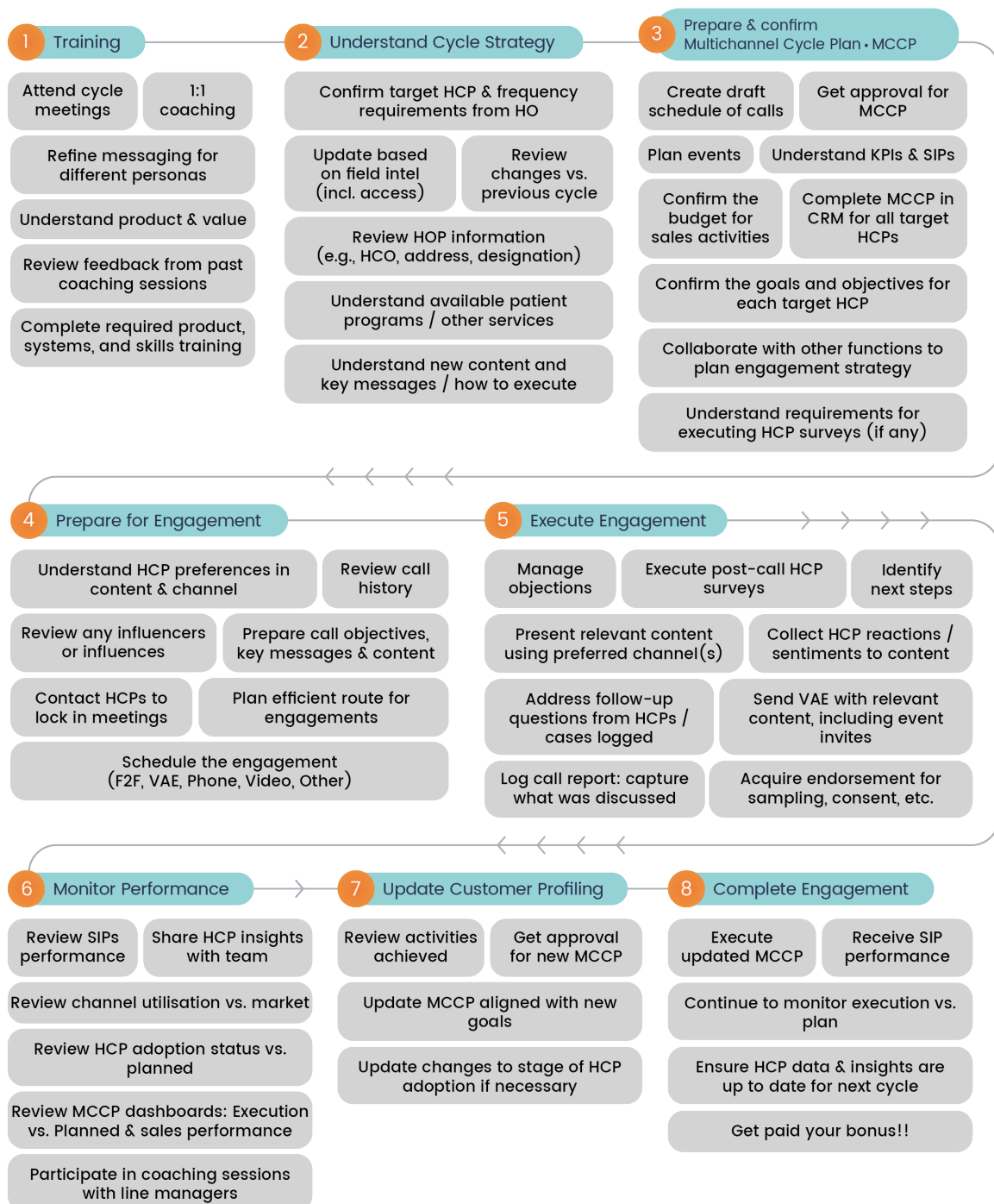
<sup>2</sup><https://www.biospectrumasia.com/analysis/34/25516/apac-takes-centre-stage-in-ai-driven-drug-discovery.html>

# What We Did

The objective of these workshops was to determine whether AI can improve Sales Reps' productivity and efficiency by facilitating their jobs-to-be-done (JTBD), such as delivering personalized engagements to improve the quality of their interactions with HCPs.

We started by looking at 8 steps of a Sales Rep's cycle journey - from rep training to engagement preparation to engagement completion - and the specific jobs to be done within each step (Figure 1). Attendees were then asked to identify which of these jobs were most important to the business but had poor rep satisfaction (either through ease of execution or executing in an effective manner). This prioritization of jobs provided our starting point to identifying possible AI solutions, and how we can add the most value to a rep's journey.

**Figure 1: Pharma Reps Jobs to be Done • JTBD**



# What We Learned

Among the jobs prioritized, the top three categories the cited jobs fell into were Prepare for Engagement (26%), Executing Engagements (19%), and Preparing & Confirming Multi Channel Cycle Planning (MCCP) (19%) (Figure 2).

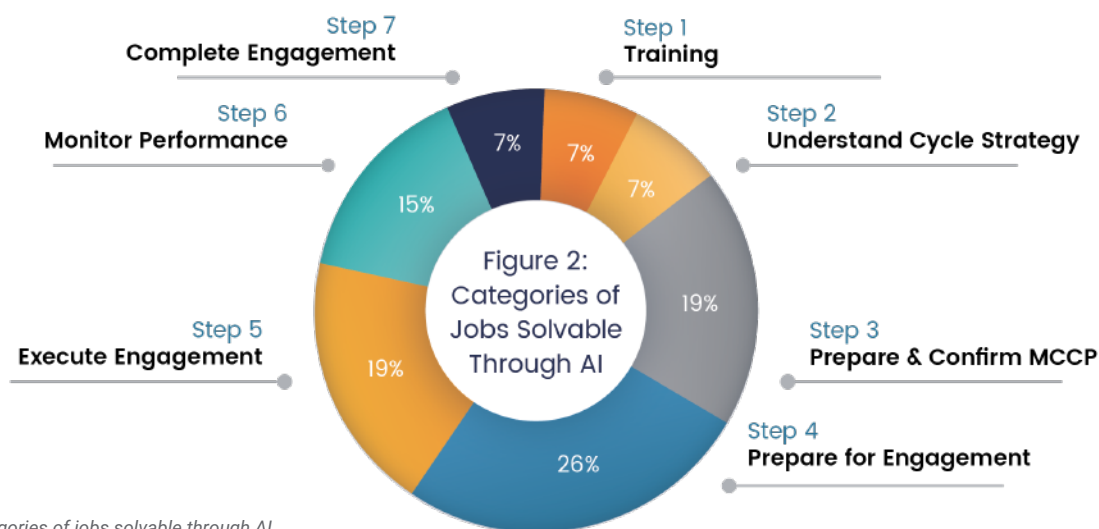


Figure 2: Categories of jobs solvable through AI

Specifically, jobs cited most frequently included “Prepare call objectives, key messages & content” and “Understand HCP preferences in content & channel” (Figure 3). The emphasis on pre-call planning and understanding HCP needs is no surprise. In the view of Paul Vilner, Business Operations and Strategy Lead, Merck Healthcare Australia and New Zealand, “If we focus on what’s best for the customer and how they want to engage, we will create value for the business and the customer.”

**Figure 3: Jobs Cited as Priority & Solvable Through AI**

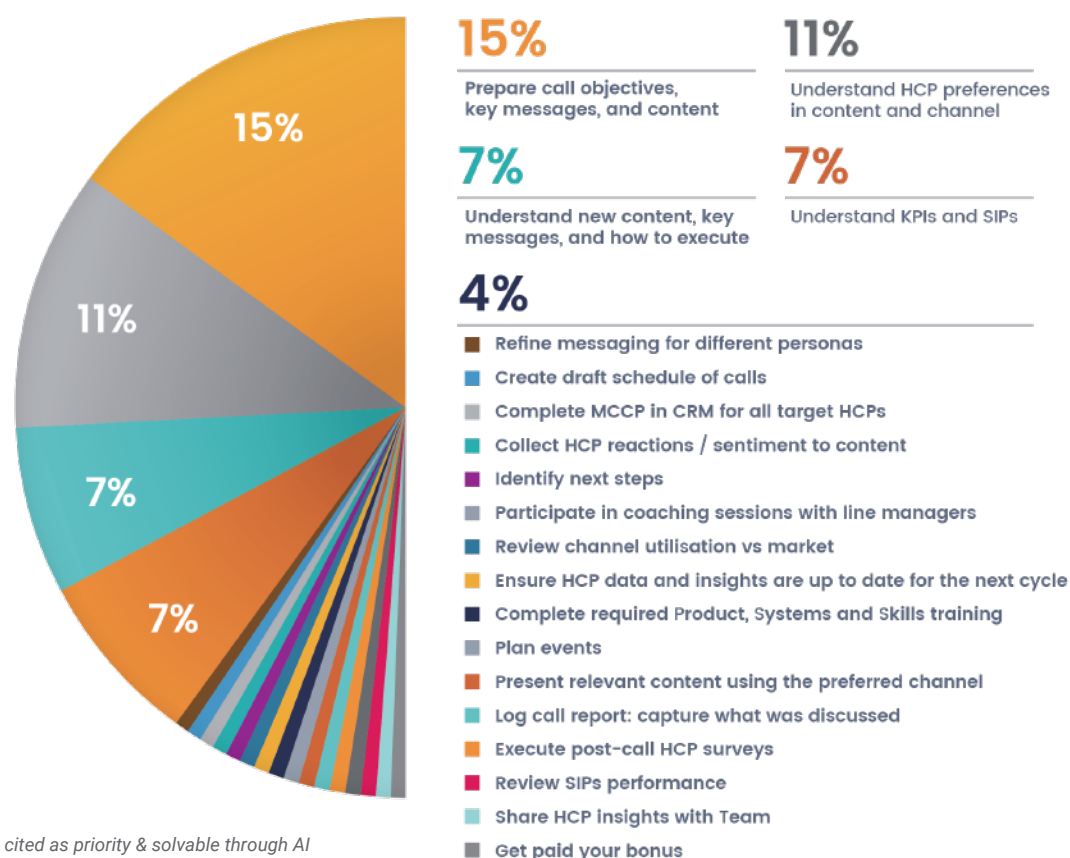


Figure 3: Jobs cited as priority & solvable through AI

While some of these are solvable through non-AI solutions, such as “Get paid your bonus”, many of these should be considered priorities for AI solutions that can automate or streamline the preparation and tailoring of sales interactions, empowering reps to be more effective and satisfied with their performance in these crucial, yet currently challenging, aspects of their role.

## The Need For AI

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Achieving true customer centricity and improving rep productivity demands a strategic integration of AI, particularly to simplify the critical planning and preparation stages of customer engagement. Organizations must pinpoint existing “jobs to be done” within their sales, marketing, and medical teams where reps encounter significant pain points, especially those that impede effective customer interactions.

By piloting high-impact AI use cases - such as automating call objective creation, refining key messages, and enhancing the understanding of HCP preferences - and iteratively refining workflows based on feedback, businesses can drastically ease the operational burden on reps. Similarly, AI solutions offer significant opportunities to enhance the effectiveness and productivity of Medical Science Liaisons

(MSLs) by streamlining their engagement planning, content delivery, and insights gathering with Key Opinion Leaders and other healthcare professionals.

Engaging with industry partners that span strategy and technology, such as Veeva’s Business Consulting team, ensures leadership is well positioned to identify these pivotal AI opportunities, and deliver measurable productivity gains, increase customer value, and foster business growth, while ensuring compliant data and technology utilization. AI adoption represents a profound business process transformation, necessitating support for organizational change across operating models, data strategy, team roles, and mindset to fully realize these new, more efficient, and customer-focused ways of working.

## Veeva’s Foundation to Power Your AI Strategy

### An Overview of Veeva AI

Veeva is helping to transform Pharma by integrating AI across its Industry Cloud. **Veeva AI** is a major initiative that adds AI to Vault Platform and Veeva Applications to help life sciences companies automate tasks and improve employee productivity. Adding Veeva AI to Vault Platform and Veeva applications will help make AI simple, secure, and compliant for life sciences companies. This makes Vault the fastest path to AI to improve rep productivity.

Veeva AI includes AI Agents and AI Shortcuts that leverage large language models (LLMs) to streamline workflows, automate tasks, and provide users with intelligent assistance. This is fueled by **Direct Data API**, providing high-speed access to data for AI solutions, as well as our **AI Partner Program**, which enables organizations and partners to more easily build AI applications that seamlessly integrate with Vault.



## ★ Facilitating Rep JTBD with Veeva AI

Our AI approach in commercial is to enable users with practical AI to drive productivity. The AI Agent most applicable in this context is the [CRM Bot](#), a GenAI assistant in [Vault CRM](#). This provides users with intelligent insights and recommendations by utilizing [Veeva OpenData](#), [Veeva CRM Pulse](#) and [Veeva Link Key People](#) as well as by reading directly from content embedded in Vault CRM. The output? A concise and comprehensive suggestion from Veeva AI on the best channel, and the most relevant content to use with HCPs (Figure 4).



Figure 4: Progressive data integration within Veeva AI for increased sales effectiveness: From Veeva OpenData only (A) to enriched insights with Veeva CRM Pulse (B) and deep insights with the addition of Veeva Link Key People (C), leading to highly personalized engagement strategies for a sales representative. Note: this graphic is for illustrative purposes only and does not necessarily represent how Veeva AI would respond in a real-world scenario.

This is where Veeva AI can help tackle the numerous "jobs to be done" across the rep journey, such as preparing call objectives, key messages and content, as highlighted in the outcomes of the workshops. In fact, we found an opportunity for AI to improve the ease and effectiveness of execution in nearly every step of a rep's planning, preparation, and execution of their interactions with customers.

Examples include leveraging [Veeva's Compliant Free-text](#) for valuable, compliant call logging and [Voice Control](#) for hands-free CRM operation. The success of these intelligent solutions is fundamentally supported by Veeva's robust data foundation, a critical investment to effectively harness AI's power and ensure reliable, impactful tools for our clients.

## ★ AI Solutions Are Only as Good as Your Data Strategy

A robust data strategy is paramount for successfully implementing AI, especially in the life sciences industry, as it directly impacts the accuracy, scalability, and effectiveness of AI-driven solutions. This strategy relies on three critical pillars: a strong data architecture that provides the structural framework for data management and accessibility; high-quality data to ensure the reliability and accuracy of information fueling AI; and 'Deep Data' to derive comprehensive, actionable insights for highly personalized customer engagements.

# ★ The Foundation: Data Architecture

A robust, simple data architecture is the cornerstone of any successful AI strategy. It provides the framework for how data is collected, stored, managed, and accessed across an organization and AI solutions. Veeva's approach to data architecture within the Vault CRM Suite is centered on:

## 01 Unified Database

A centralized database for Veeva Commercial Applications ensures data consistency (i.e., a single customer record), eliminates silos, and improves accessibility (Figure 5). This unified approach streamlines workflows, provides a single source of truth for customer information, and minimizes maintenance efforts. This contrasts with other traditional CRM providers, with solutions built on different databases requiring high maintenance connectors or integrations to synchronize the data (Figure 6).

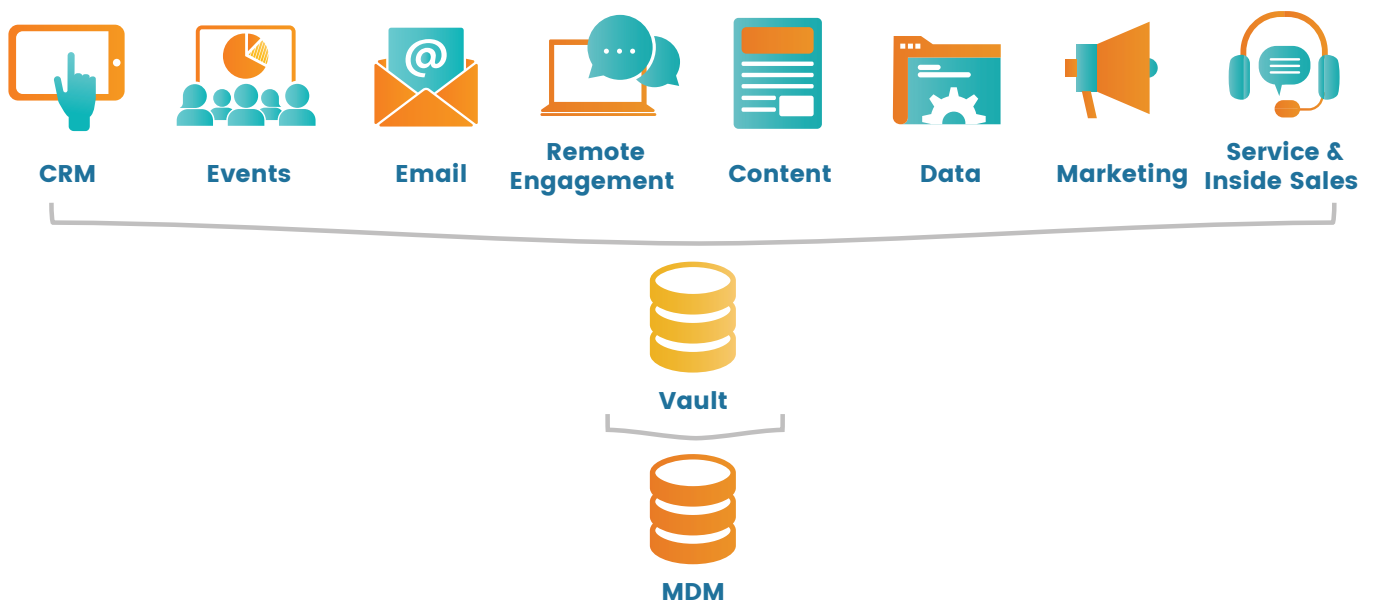


Figure 5: Veeva Vault Commercial Suite is built on a unified database ensuring the existence of a single customer record to minimise maintenance, eliminate silos & improve accessibility for AI.

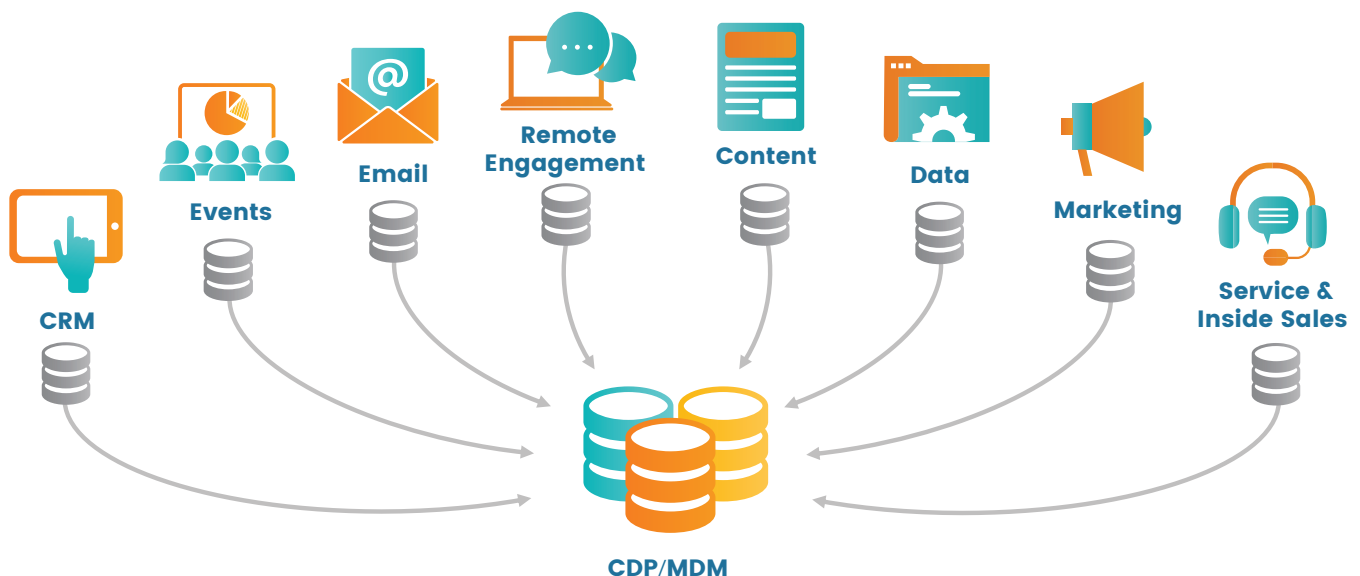


Figure 6: Solutions which are built on separate databases do not easily maintain a single customer record which adds costs in the form of connectors and ongoing maintenance.

## 02

### Common Data Architecture (CDA)

CDA is a simple, open data standard that enhances efficiency and system interoperability. By providing common definitions for entities, attributes, and picklist items, CDA simplifies data integration and enables seamless communication between different systems. This "common language" for data reduces the complexity of data management and accelerates the deployment of new applications and technologies.

## 03

### Direct Data API

This is a new class of API for easy, high-speed access of data without impacting application performance. Up to 100 times faster than traditional APIs and transactionally sound across large datasets, you can reliably extract full or incremental data to power AI applications, analytics, and system-to-system integrations (Figure 7).

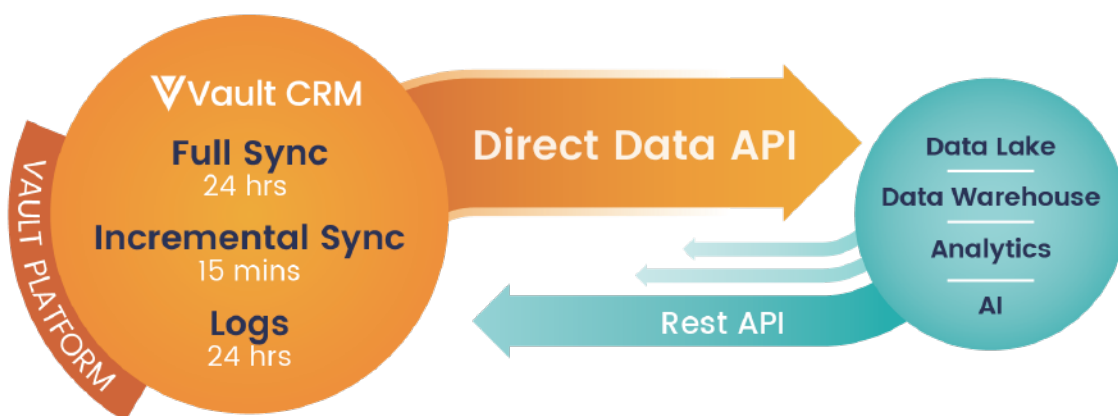


Figure 7: The Direct Data API delivers low-latency, high throughput data one-way directly to your chosen endpoints, like a data lake or data warehouse. This enables seamless integration for AI and analytics, where insights can then be fed back into Vault via the traditional REST API for users to action.

A robust, intelligent data architecture offers several key benefits. It provides a simplified IT infrastructure, reducing complexity, costs, and management overhead. It also ensures improved data quality and consistency, which builds trust and enables reliable decision-making, crucial for AI capabilities. Furthermore, this foundation drives increased agility and faster innovation within your organization, alongside a stronger security and compliance posture.



## The Fuel: Data Quality

High-quality data is essential for driving accurate and scalable AI, enabling effective customer engagement, and supporting critical business decisions. Veeva recognizes the importance of data quality and provides solutions to ensure that life sciences organizations have access to reliable and accurate information.

**Veeva OpenData** is our solution to deliver a high-quality customer reference database with comprehensive coverage of healthcare organizations (HCOs), healthcare professionals (HCPs), and their affiliations. Veeva OpenData plays a foundational role, enabling a robust understanding of the total available market as well as ensuring consistency, accuracy, and scalability across functions.



Veeva OpenData delivers accurate and up-to-date data through proactive maintenance and faster turnaround on data change requests (DCRs). Over 80% of database updates are proactively conducted by Veeva, and DCRs are resolved in an average of 10 hours, reducing both the volume of DCRs and wait times for field teams (Figure 8).



Figure 8: Veeva OpenData's commitment to high-quality data (APAC average statistics)

## ★ The Insight: Deep Data

While a solid data architecture and high-quality data are foundational, the true power for life sciences lies in the ability to derive deep, actionable insights. This understanding is the engine that drives meaningful connections with customers, empowers transformative AI applications, and ultimately leads to better patient outcomes. Veeva provides the solutions necessary to unlock this critical level of understanding:

### 01 Veeva CRM Pulse

Veeva CRM Pulse provides quarterly data on HCP access, engagement frequency, and industry engagement. By aggregating and anonymizing data from Veeva CRM, Pulse delivers a true industry census, offering valuable insights into market trends and HCP behavior (Figure 9). Pulse data is privacy-safe, using brick-level data to group HCPs with similar access and engagement patterns.



Figure 9: Veeva CRM Pulse delivers true industry census by capturing over 80% of CRM activity globally.

Veeva Link Key People provides deep Key Opinion Leader (KOL) data, including scholarly publications, educational background, clinical trials, event engagements, social media presence, and more. This comprehensive information supports a wide range of use cases across the enterprise, including medical affairs, sales, and marketing.

The synergy of "Deep Data" and AI will be indispensable for a modern pharmaceutical company. By progressively integrating more comprehensive data sources - from quality reference data (Veeva OpenData) to more granular engagement data (Veeva CRM Pulse) and finally, enriched insights from deep KOL activity data (Veeva Link Key People) - the intelligence and actionable recommendations provided by AI elevate dramatically (Figure 4). This transformation from a broad suggestion to a highly tailored and compelling reason for engagement - i.e., identifying specific research interests and relevant past interactions - underscores that AI's true power isn't just in processing data, but in synthesizing deep, varied information to unlock hyper-personalized insights and drive significantly better business outcomes. This level of informed action, impossible with isolated or shallow data, is the core of Deep Data + AI's transformative potential. Ultimately, Deep Data supports critical AI initiatives from the head office all the way through to individual field representatives.

This whitepaper has highlighted the pressing challenges faced by pharma sales teams in today's dynamic life sciences landscape, particularly the need for hyper-personalized, timely customer engagements amidst declining HCP access. Veeva's native AI solution directly addresses these critical issues by building upon a robust foundation of its **Platform** and **Connected Software**. This, in turn, enables **Connected Data**, providing a unified view of the customer. Ultimately, this powerful and interconnected stack empowers **Veeva AI's** advanced capabilities, including its LLM-powered agents and shortcuts (Figure 10).



Figure 10: The Veeva AI Stack: a natively connected architecture of platform, software, data & AI for true customer centricity.

This connected approach empowers field representatives to provide truly personalized and impactful engagements, fostering deeper insights and more efficient operations. Realizing this potential requires meticulously focusing AI on specific, high-value tasks and carefully considering the relevant data sources to fuel these capabilities. Furthermore, robust platform requirements are paramount to ensure seamless integration, security, and scalability. By driving smarter decision-making and leveraging a well-architected AI strategy, Veeva shapes a future where life sciences field teams are well-equipped to deliver superior patient outcomes and achieve true customer centricity.



## Final Thoughts on Solving the AI Challenge for Pharma Field Teams

The rapidly evolving life sciences landscape necessitates a strategic shift for pharma commercial teams, who are increasingly challenged by declining face-to-face interactions with healthcare professionals (HCPs) and the need for hyper-personalized engagements. To address this, organizations must leverage AI to automate data analysis, surface relevant content, and streamline critical planning and engagement activities for sales representatives and medical science liaisons. Veeva's approach to this challenge is to support industry with an AI solution, built on a unified data foundation, empowering users with intelligent insights and recommendations, ultimately enhancing customer engagement, improving operational efficiency, and driving innovation. To unlock true customer centricity and significantly boost productivity, pharma leaders should connect with Veeva Business Consulting today to discuss how an engagement can optimize your data strategy and the high-impact AI use cases for sales, medical & marketing.

**For more information, or to discuss how Veeva can support your AI strategy needs please contact the authors of this whitepaper:**

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