Veeva

WHITE PAPER

Powering Agentic HCP Journeys: A Guide for Emerging Biotechs

Reach peak sales 10% faster with the Agentic Commercial™ model

Executive summary: The agentic engagement platform for lean teams

The industry is shifting toward agentic customer journeys to deliver timely scientific information and reach peak sales 10% faster than the traditional five- to seven-year timeline. With agentic AI, biopharmas can better understand and respond to healthcare professional (HCP) needs, automate cross-functional workflows, and accelerate market entry.

Lean teams do not have to compromise on technology or incur IT debt to achieve this level of engagement. More than 200 companies have unified sales, marketing, and medical teams on a single platform with shared customer data and built-in, industry-specific agentic capabilities. With these advantages, they can connect every touchpoint across digital, field, and events to:

- **Uncover Commercial Evidence™:** Establishing the agentic CRM as the foundation for AI and advanced analytics to surface previously fragmented, hard-to-access market intelligence
- **Minimize technical debt:** Replacing disconnected point solutions with a unified CRM suite to eliminate custom coding and costly integrations
- **Maximize campaign impact:** Empowering marketing and field teams to co-personalize segmented, multi-action campaigns that capitalize on established HCP relationships

> *Transitioning to Veeva Vault CRM is a strategic investment that combines innovation with financial responsibility. By simplifying our technology landscape and improving data quality, we reduce complexity and secure long-term cost efficiencies."*
>
> **Fabian Raschke**
> **Chief Financial Officer**
> **Grünenthal**

Emerging biopharmas are building continuous journeys for HCPs in the new Agentic Commercial model. By identifying treatment barriers in days rather than weeks, they accelerate launch performance to reach peak sales 10% faster.



Navigating non-linear HCP journeys with agentic AI

Today's HCPs do not move through a sequential commercial funnel. An oncologist might download clinical data at midnight, meet with a field representative weeks later, and then consult an MSL at an international medical congress. Agentic AI weaves a continuous thread of these touchpoints across digital, field, and events.

For emerging biopharmas, delivering connected journeys is difficult when teams operate on disconnected point solutions or generic platforms. Stitching together incompatible systems or relying on a CRM that requires heavy customization for life sciences workflows introduces operational and compliance blind spots. It also burns runway, blunts AI efficacy, and delays time to market.

Biotechs no longer have to choose between lean operations and enterprise-grade engagement. In the Agentic Commercial model, commercial organizations deliver responsive customer journeys using a single architecture with domain-specific AI and clean, unified data. This approach achieves the 'right message, right customer, right time' goal at scale.

> *Vault CRM provides a connected data ecosystem for commercial and medical teams, centered around the customer, which is absolutely critical for building a strong AI foundation."*
>
> **Parag Govil**
> **Senior Vice President**
> **Head of Information Technology**
> **Ionis**

Pursuing agentic engagement: Generic vs. industry-specific platforms and AI

The myth	The reality with generic platforms and AI	Agentic journeys on one database, one platform
Architecture and collaboration *"Horizontal tools provide a simple architecture for cross-functional collaboration."*	**Tech stacks and blind spots:** Fragmentation risks missing core capabilities. Marketers build unused assets, reps are unaware of service touchpoints and emails sent to priority HCPs, and teams overlook medical insights.	**Unified, deep functionality:** Sales, marketing, medical, and service teams using Veeva Vault Platform, built on one database, see the same record for each HCP for real-time visibility across digital, personal, and event touchpoints.
AI maturity *"Broad, industry-agnostic platforms offer more mature out-of-the-box AI."*	**The generic AI learning curve**: Broad models struggle to grasp life sciences context. Across a disconnected tech stack, disjointed AI cannot seamlessly trigger cross-functional workflows for agentic journeys.	**Purpose-built agentic AI:** Pre-trained, compliant, and integrated directly into the core platform, biopharma-specific AI immediately powers the Agentic Commercial model.
Regulatory compliance *"Compliance features can easily be built on top of generalist platforms using custom objects."*	**Fragile custom code:** Custom compliance logic often breaks during standard platform updates, triggering disruptive and expensive manual remediation and revalidation cycles.	**Native life sciences governance:** Built-in industry compliance eliminates custom engineering debt, automates validation across releases, and delivers compliant scientific content without delay.
Total cost of ownership (TCO) *"Generalist platforms are more cost-effective for lean biotech budgets."*	**Hidden post-purchase costs:** Low initial license fees hide expensive custom configurations, third-party apps, data ingress/egress fees, and developer hours that increase actual TCO. There is often a charge for every interaction with external AI.	**Predictable investment:** Biopharma-native features and routine updates come standard without the costs of custom code, integrations, and spiraling lifecycle maintenance.

Step-by-step: The AI-powered HCP journey in action

Sales, marketing, and medical teams operating on a unified platform can meet expectations for immediate, relevant scientific dialogue while proactively anticipating customers' needs.

The following scenario illustrates how Veeva Vault CRM Suite with built-in AI evaluates intent signals and triggers intelligent, coordinated next-best actions between human teams and autonomous agents.

MARKETING, CUSTOMER SERVICE, INSIDE SALES

Inbound support: Dr. Vogel contacts customer support seeking clinical trial data. A service representative logs the inquiry in Veeva Vault CRM Service Center, reviews her historical interactions, and provides the requested information before directing her to the interactive brand portal.

Interactive digital self-service: On the brand portal, Dr. Vogel reviews trial results and queries patient dosing guidelines. Veeva Ostro powers conversational AI to deliver immediate, personalized answers sourced directly from pre-approved content.

MARKETING AND FIELD

Signal capture and lead nurturing: Connected via API to Veeva Vault CRM Campaign Manager, the brand portal logs Dr. Vogel's inquiries and initiates a personalized brand journey. Subsequent journey actions build the relationship. Campaign Manager may then suggest a field action for the appropriate rep based on alignments created in Veeva Vault CRM Align, enabling an in-person visit.

Orchestrated digital and field: Marketing builds an automated email journey for an upcoming regional medical event. With one click in Campaign Manager, marketing enables field review so the assigned rep can evaluate and adjust delivery timing based on local account context.

FIELD

Rep-led personalization: Directly in Vault CRM, the rep evaluates the automated suggestion to invite Dr. Vogel to the regional event. Agreeing with the recommendation, the rep cancels the automated email in favor of personal outreach.

Direct dialogue: Using Veeva Vault CRM Approved Email, the rep sends a compliant message referencing Dr. Vogel's portal activity. After a positive response, the dialogue moves to compliant third-party messaging (Microsoft Teams, WhatsApp, Zoom, or SMS) via Veeva Vault CRM Engage to schedule a face-to-face meeting.

Pre-call briefing: The rep prepares for the meeting using conversational AI in Vault CRM, generating an account briefing that identifies high-value scientific topics and surfaces the most relevant content to respect the physician's time.

CROSS TEAM

Cross-team execution: During the meeting, the rep addresses treatment protocol nuances and shares a targeted registration link via Veeva Vault CRM Events Management to capture Dr. Vogel's RSVP for the regional symposium.

Voice-to-data field reporting: Post-meeting, the rep dictates observations using Agentic Call Report™ in Vault CRM. The system transcribes and structures the notes into clean data fields without manual form entry, capturing Commercial Evidence™ on local access barriers and patient subpopulation considerations.

Rapid asset creation: Aggregated call reports and search queries reveal an information gap about a patient subpopulation. Home-office teams use Vault AI in PromoMats and Veeva Falcon MLR to author, review, and approve targeted medical assets in days, not weeks.

Shared intelligence: The field rep shares the newly approved assets with Dr. Vogel. Separately, an MSL sees her customer journey and clinical interests, and invites her to chair an upcoming congress roundtable. The commercial team manages speaker contracting, honoraria, and expense tracking in Events Management to streamline compliance.

Congress impact and auto follow-up: Ahead of the event, commercial and medical teams monitor broad KOL sentiment using Veeva Link Key People. Post-conference, Vault CRM Suite auto-triggers tailored follow-up communications based on session attendance and feedback, establishing a continuous conversation across digital, personal, and event channels.

Building the foundation: 4 pillars of the agentic CRM

This operational model does not rely on fragile custom middleware. It functions on an integrated life sciences ecosystem designed specifically for strict regulatory environments. Equipping commercial teams with industry agent-assisted workflows transforms the CRM from a passive record-keeping archive into an active engine across four core areas:

Connected	Precise	Fast	Personal
Digital, field, events, and agents	Identify and remove barriers	Compliant, timely messaging	Powered by field relationships

01. **Connected across digital, field, and events**: Operating from a single customer record across campaigns, personal interactions, and congresses preserves context. Industry agent-assisted workflows surface a dynamic Hot List of prioritized accounts based on real-time intent, allowing reps to initiate relevant outreach aligned with marketing strategy.

02. **Precise engagement using agentic AI:** Field teams compliantly capture qualitative call notes via speech or text after meeting with an HCP using the Agentic Call Report. Built-in AI automatically structures their observations into database fields, flags market access delays, and routes urgent insights to home-office teams. This actionable **Commercial Evidence** is captured in 65% of field calls.

    Two-way digital marketing campaigns that use conversational AI allow HCPs to ask questions and receive immediate, compliant answers pulled directly from approved materials. Their inquiries and requests contribute to Commercial Evidence when analyzed in aggregate, revealing friction points and unmet needs at scale.



65%

of field calls capture actionable Commercial Evidence

03. **Faster delivery of compliant content:** Field execution links natively to digital asset management in **PromoMats** and Veeva MedComms. Field reps locate, summarize, and launch content for proactive planning and real-time support during customer interactions using natural-language search in Agentic Media Search. Closed-loop reporting shows exactly which scientific assets drive engagement and helps determine where to direct content resources.

04. **Field insights fed back to marketing strategy:** Biotech digital marketing performs best when it reinforces the representative's role as a trusted advisor. Integrating sales and marketing with agentic AI gives field teams direct influence over campaign timing and message personalization, ensuring every subsequent touchpoint meets current customer needs.

Uniting field and marketing to maximize campaign ROI

In commercial biopharma, HCPs frequently receive one-way marketing emails that offer no opportunity for dialogue and break the continuity of communication. At scale, uncoordinated digital blasts cause physician fatigue and diminish campaign return on investment.

Pairing non-personal marketing with field interactions capitalizes on the field team's HCP access and relationships. Campaign Manager operates directly within Vault CRM, uniting digital journeys, field interactions, and event touchpoints into an integrated workflow. Marketers visualize and automate customer flows using a drag-and-drop interface. Journeys blend home office outreach, field emails, compliant chat, and in-person visits, adapting in real time to HCP responses and external triggers. The platform schedules the next relevant digital communication or alerts the assigned territory rep to schedule a visit.

For lean biotechs operating with focused teams and finite budgets, this synchronization generates outsized commercial impact without enterprise overhead.



Campaign Manager unites automated digital outreach and field rep visits inside Vault CRM, delivering enterprise-grade omnichannel ROI for lean biotech teams.

Case study: How MoonLake scaled pre-launch engagement

As MoonLake Immunotherapeutics prepared for its U.S. launch, the commercial team needed to build disease awareness among dermatologists ahead of the American Academy of Dermatology (AAD) annual meeting with only a six-week deployment window. Speed was only part of the decision. The company wanted a unified platform it could continue innovating with as it matured.

MoonLake partnered with Veeva to activate Vault CRM and Campaign Manager to establish enterprise-level reach from day one. Digital and in-person engagement data unified into a single customer record, creating the foundation for ongoing clinical dialogue.

"We take all of the insights we extract from HCPs to uncover gaps and determine where we need to strengthen awareness across priority topics," explains Bernardo Garcês, commercial manager at MoonLake. Today, MoonLake delivers educational newsletters, congress updates, and disease-state awareness campaigns run by in-house teams in collaboration with agency partners, maintaining the agility to iterate messaging quickly based on verified engagement metrics.

> *With Campaign Manager, we understand what really resonates and iterate on appropriate messaging. Our end users are the actual folks managing the campaign — it's a seamless connection."*
>
> **Bernardo Garcês**
> **Manager, Commercial**
> **MoonLake Immunotherapeutics**

Next steps for your Agentic Commercial strategy

Commercializing complex, specialized therapies requires emerging biopharmas to move past fragmented interactions in favor of continuous conversations with HCPs. Deploying Vault CRM Suite with industry agent-assisted workflows establishes a modern commercial foundation on day one — eliminating external system integration dependencies, stabilizing total cost of ownership, and providing native compliance safeguards that adapt automatically as global regulations evolve.

Unifying commercial operations allows lean teams to identify and resolve clinical adoption barriers faster, accelerating patient access to vital treatments. Reach out to your account partner to learn more.

Take the next step

See how Vault CRM Suite is powering continuous, agentic HCP journeys for emerging biopharma.

Veeva

ABOUT US

Veeva delivers the industry cloud for life sciences with applications, agents, data, and consulting. Committed to innovation, product excellence, and customer success, Veeva serves more than 1,500 customers, ranging from the world's largest pharmaceutical companies to emerging biotechs. As a Public Benefit Corporation, Veeva is committed to balancing the interests of all stakeholders, including customers, employees, shareholders, and the industries it serves.

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