Free Text Uncovers the HCP Engagement Insights Biopharma Is Missing

Deep, contextual primary engagement data is a requirement to advance relationship management and omnichannel orchestration

As the primary engagement channel, field teams are the most direct and expensive way to build relationships with healthcare professionals (HCPs). Yet most companies miss the deep insights from their most valued engagement channel by using structured drop-down values to record meeting notes, mainly because of legacy compliance concerns.

Relying on generic meeting notes joined with third-party data, such as prescription data, does nothing to advance relationship management, omnichannel orchestration, and AI initiatives in a differentiated way.

Detailed engagement data, captured through free text notes from the field, provides the context and texture needed to understand an HCP's immediate needs and emerging treatment barriers. It's also vital for connecting the dots across HCP engagements with sales, marketing, and medical teams, so each interaction informs the next.

As biopharmas invest heavily to drive more efficient and impactful engagements — through optimized pre-call planning and orchestrated omnichannel strategies, for example — building enriched primary engagement insights with free text will become foundational to success. With Veeva's Free Text Agent, the field force can capture the rich context of conversations within an organization's compliance guardrails by monitoring free text in real-time.

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> — **Dale Cooke**, Regulatory attorney for life sciences and medical device companies

This report explores the important steps for adopting a business-driven approach to using compliant Free Text Agent and unlocking enriched engagement data as a differentiator.

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Free text creates primary engagement insights for optimizing relationship management, omnichannel orchestration, and AI

When every organization can buy the same third-party data, the only true differentiator for strengthening relationships and orchestrating engagement is the quality and application of your primary engagement data.

Highly valuable engagement insights — such as the HCP's true intent, sentiment regarding new data, unsolicited questions about off-label topics, or specific barriers to adoption — should be captured within rich, narrative free text. When field teams are forced to summarize a complex dialogue into a handful of predefined drop-down selections, nuance and connectivity is lost.

Most commercial organizations still do not allow for free text entry due to compliance concerns. The fear that a field team member might inadvertently document an unapproved claim or proprietary information is often enough for an organization to default to a restrictive, lowest-common-denominator data capture policy. As a result, we lose important detail and limit the efficacy of high-value investments in AI designed to orchestrate engagement across functions and roles.

Effectively capturing and using this deep, contextual data is the foundation for an engagement model that is connected, personalized, and truly orchestrated across sales, marketing, and medical teams.

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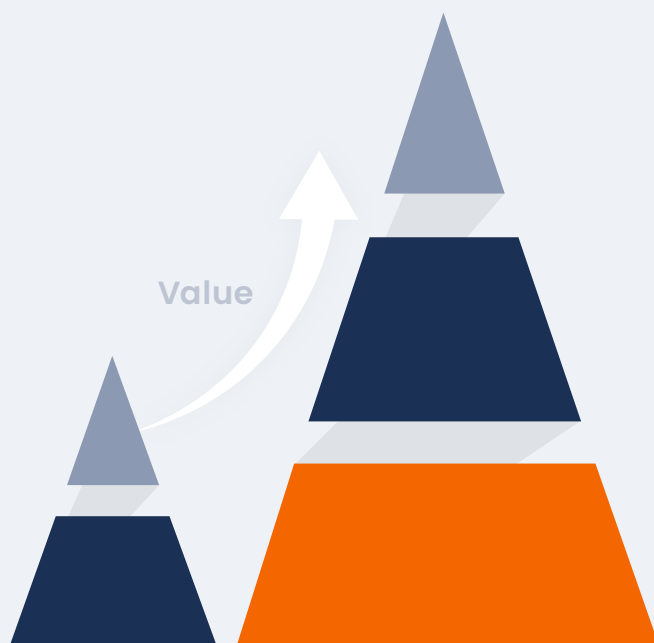
Optimized Relationship Management
Relationship management is elevated with connected, personalized touchpoints where every interaction informs the next, regardless of which team or function conducts the outreach.

Omnichannel Orchestration and AI
High fidelity primary engagement data strengthens the inputs to analytics models and AI, creating insights and context across sales, marketing, and medical teams for truly orchestrated engagement.

Free Text Foundation
Nuanced engagement information captures deep context for an HCP's immediate needs, sentiment regarding new data, and emerging treatment barriers.

Compliant Free Text Agent helps unlock rich engagement data

Free Text Agent offers a real-time, proactive compliance check and coaching tool that enables:

Rich context capture

Field teams are finally free to record the full context and nuance of their discussions with customers without worrying about compliance concerns.

Instant guardrails

The agent scans the text before submission. It instantly identifies and flags potential non-compliant entries (e.g., unapproved therapeutic claims, mentions of competitor pricing, or private patient information).

On-the-spot coaching

Rather than simply blocking the submission, the agent offers in-the-moment coaching to the user, requesting the removal of sensitive content. This not only ensures regulatory adherence but also elevates the field team's understanding of compliance rules.

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The new technology in Free Text Agent is foundational for getting the most value from more advanced commercial tools. For instance, pre-call agents and orchestration engines require deep engagement detail to operate effectively.

Test, learn, and scale

Connecting free text capture to its business impact is essential. Commercial and compliance leaders must agree on free text's role in driving commercial and medical innovation.

Early adopters of the AI agent for compliant free text are taking a structured, phased project approach:

STEP 1	Define clear and measurable value cases for free text data	Define how you will use the data and insights generated from free text for broader commercial activation and success. Clearly identify the sources of input, such as orchestration models, pre-call agents, and brand planning efforts.
STEP 2	Bring compliance in early	Compliance must be viewed as a partner, not a barrier. Early engagement allows compliance professionals to help define the rules and understand how the tool mitigates the exact risks they are concerned about.
STEP 3	Pilot, train, measure, and scale	**Pilot:** Start with a small, motivated field group and integrate them into a dedicated change management campaign. **Train:** Train users not just on how to use the tool, but on the value of the data they are capturing and how it improves their customers' experience. **Measure and scale:** Document and address adoption concerns from the outset with the pilot team. Assess performance against value cases and use momentum and confidence built during pilots to establish the organizational rollout plan. Excite teams with communication about wins and key learnings.

Shifting to the use of free text is a necessity for advancing relationship management and omnichannel orchestration. The organizations that compliantly tap into and apply their own rich, primary engagement data will execute the most efficient and effective engagement model for the future.

Ensure your commercial and medical teams are prepared to leverage the full impact of AI agents with [Veeva Business Consulting's](#) in-depth analysis.