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Veeva AI Roadmap: CRM Bot, Agents, and 2026 Rollout

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Executive Summary

Veeva Systems' artificial intelligence (AI) roadmap has evolved dramatically from its early **Veeva Andi** in 2019 to today's industry-specific **AI Agents** spanning all functions of its Vault platform. This report provides an in-depth analysis of Veeva's AI journey, covering historical context, key innovations (Vault CRM Bot, AI Shortcuts, etc.), and the phased "2026 rollout" of AI across clinical, regulatory, commercial, and other domains. We examine how each new capability – from the initial Andi assistant to the announced Vault CRM Bot and AI Agents – is designed, what it does, and most importantly *what it means for life sciences customers*. The timeline of announcements (Table 1) highlights the rapid acceleration of AI in Veeva's products: 2019's Veeva Andi, 2024's CRM Bot/Voice/MLR Bots, 2025's formal Veeva AI initiative, and the deployment of AI Agents beginning in December 2025. For customers, the proposed benefits include productivity improvements, automation, and faster time-to-insight; realizing them requires data, governance, and change management processes. We draw on Veeva's own disclosures, customer feedback, analyst commentary, and industry studies to assess the benefits, challenges, and future implications of Veeva's comprehensive AI strategy. Public customer comments from Bristol Myers Squibb, Moderna, and Novo Nordisk illustrate expectations and vendor-reported early feedback; they do not establish measured ROI. This report concludes that Veeva's AI roadmap – blending prebuilt, context-aware agents with open-ended user "Shortcuts" – positions Veeva to transform life sciences workflows, while also underscoring the importance of a disciplined approach to data quality, compliance and user training.

Introduction and Background

The life sciences industry is undergoing a digital transformation, adopting cloud-based enterprise software to manage complex processes from research to commercial. Veeva Systems (NYSE: VEEV) is a pioneer in this space, offering **Veeva Vault Platform** applications tailored to pharma/biotech needs (e.g. eTMF for clinical trials, Vault Quality, Vault RIM, **Vault Safety**) and a unified **Vault CRM** for commercial/medical operations (www.advfn.com) (en.antaranews.com). As of late 2025, Veeva serves well over 1,500 customers globally

(from the largest drugmakers to emerging biotech) ([en.antaranews.com](#)). Its products integrate life-sciences master data (HCP registries, product catalogs, etc.), workflows shaped by regulatory standards, and content management, making them uniquely suited for highly regulated customer engagement and content approval processes ([www.advfn.com](#)) ([intuitionlabs.ai](#)).

Veeva Andi (2019) was introduced on May 14, 2019, with availability in North America that day and other regions beginning in 2020. It offered contextual insights and next-action suggestions in Veeva CRM. The same release described **CRM Approved Notes** and **Vault Auto Claims Linking** as additional AI capabilities, separate from Andi ([Veeva's 2019 release](#)).

The advent of large language models (LLMs) and “generative AI” in late 2022 (e.g. OpenAI’s ChatGPT) created new opportunity and urgency. Generic AI tools raised the aspiration that knowledge work could be automated, but life sciences companies demand industry-specific solutions that respect compliance and data privacy. Veeva’s strategy has been to harness [generative AI within its domain](#). In mid-2024, Veeva launched an **AI Partner Program** to accelerate third-party AI integrations, providing partners with advanced tools like the new **Vault Direct Data API** (up to 100 times faster data access than traditional APIs) and development sandboxes ([www.veeva.com](#)) ([ir.veeva.com](#)). By exposing Vault data at high speed (with no extra fee), Veeva enabled AI apps to reliably query customer data repositories ([ir.veeva.com](#)). Custom agents require an LLM connection; Veeva’s configuration documentation explains that the connection sends Vault data to the configured LLM ([Veeva Vault Help](#)). Customers should review the provider, processing region, retention settings, and contractual controls for each product and configuration.

Against this backdrop, Veeva has rolled out successive AI innovations in its **Vault CRM** and other products (see Table 1). Late 2024 saw announcements of the **Vault CRM Bot** and **Voice Control** (a voice interface leveraging Apple’s AI) ([www.veeva.com](#)), plus an **MLR Bot** for PromoMats ([www.veeva.com](#)) – all slated for late 2025 delivery. In April 2025, Veeva formally introduced “**Veeva AI**”: a company-wide initiative to embed *AI Agents* and *AI Shortcuts* across every Vault application ([www.veeva.com](#)). The first customer-facing AI Agents (for CRM and PromoMats) launched in December 2025 ([en.antaranews.com](#)), with additional domain-specific agents (clinical, regulatory, safety, quality, etc.) rolling out through 2026 ([en.antaranews.com](#)) ([ir.veeva.com](#)). The historical release plan is discussed alongside later rollout updates below. In the sections that follow, we examine each facet of this roadmap in detail, supported by data, publications, and industry commentary, and analyze what the CRM Bot, AI Shortcuts, and the 2026 rollout will mean for Veeva’s customers.

Veeva AI Timeline and Key Milestones

Veeva’s AI journey can be organized chronologically (Table 1). Early milestones (2019–2023) were relatively quiet except for Andi, while 2024–2026 saw rapid expansion. Key dates include the 2019 Andi launch, the 2024 AI Partner Program/Direct API, the November 2024 Vault CRM/MLR Bot announcements, the April 2025 “Veeva AI” announcement (Agents & Shortcuts), and the December 2025 launch of initial AI Agents ([www.advfn.com](#)) ([en.antaranews.com](#)). Activities through 2026 include the rollout of more agents for quality, safety, regulatory, etc. ([ir.veeva.com](#)).

Table 1: Veeva AI Roadmap – Announcements and Historical Release Plans (2019–2026)

Date	Announcement/ Release	Feature(s)
May 14, 2019	Veeva Andi available in North America; other regions beginning in 2020 (www.advfn.com)	Veeva Andi (CRM AI) – AI assistant providing tailored insights and next-action suggestions in Veeva CRM (the same announcement also described separate <i>CRM Approved Notes</i> and <i>Vault Auto Claims Linking</i> capabilities) (www.advfn.com) (www.advfn.com). Approved Notes detected potential compliance risks in free-text notes; it was not an Andi feature.
Apr 2024	Veeva AI Partner Program announced (www.veeva.com)	Partner Program & Vault Direct Data API – Framework enabling partners to build AI apps. Introduced <i>Vault Direct Data API</i> for high-speed (up to 100 times faster than traditional APIs) bulk data access (www.veeva.com) (ir.veeva.com) and sandbox for AI development.
Nov 2024	Vault CRM Bot & Voice Control announced (www.veeva.com)	Vault CRM Bot – LLM-powered chat assistant in Vault CRM for tasks like engagement planning, next-best-action suggestions (www.veeva.com). Vault CRM Voice Control – hands-free, voice-driven CRM interface via Apple Intelligence (www.veeva.com). Scheduled late 2025 release.
Dec 2024	Vault PromoMats “MLR Bot” announced (www.veeva.com)	Vault PromoMats MLR Bot – AI review bot for Medical/Legal/Regulatory compliance. Performs brand, market, channel, editorial checks on content before MLR review (www.veeva.com). Planned late 2025 release with Veeva-hosted model.
Feb 2025	Vault Direct Data API now included (ir.veeva.com)	Vault Direct Data API – Now provided at no extra cost, enabling extraction of Vault data (full/incremental) at very high speeds (up to 100 times faster than traditional APIs) (ir.veeva.com). Integrates with analytics or AI platforms (Redshift, Snowflake, etc.). Supports AI, analytics, and system integrations.
Apr 2025	“Veeva AI” initiative announced (www.veeva.com)	Veeva AI (Agents & Shortcuts) – Enterprise-wide AI strategy. Introduced concept of <i>AI Agents</i> (application-specific AI assistants with secure data access) and <i>AI Shortcuts</i> (personal AI-powered automations for end users) (www.veeva.com). Envisions AI across clinical, regulatory, quality, medical, and commercial applications (www.veeva.com). The April 2025 announcement proposed a December 2025 first release with Vault-level subscription licensing; see the pricing discussion below for subsequent changes.
Dec 2025	First Veeva AI Agents released (en.antaranews.com)	AI Agents (CRM, PromoMats) – New agents available in Vault CRM and PromoMats. Vault CRM: Free Text AI Agent (flags call-note issues), Voice Input Agent, Pre-Call Agent (suggests call actions) (en.antaranews.com). Vault PromoMats: Quick Check Agent, Content Agent (checks content for MLR, summarizes/analyzes documents) (en.antaranews.com).
Apr 2026	October 2025 plan: Safety and Quality	AI Agents (Safety, Quality) – New agents in Vault Safety and Vault Quality (pharmacovigilance, QMS). Historically planned for April 2026 (ir.veeva.com).
Aug 2026	October 2025 plan: Clinical Operations, Regulatory, Medical	AI Agents (Clinical Ops, Regulatory, Medical) – New agents for study management (eTMF/Clinical), regulatory submissions, medical affairs. Historically planned for August 2026 (ir.veeva.com).
Dec 2026	October 2025 plan: Clinical Data	AI Agents (Clinical Data) – Agents for core clinical data management (distinct from Clinical Operations). Historically planned for December 2026 (ir.veeva.com).

Table 1 Note: The April/August/December 2026 dates record the October 14, 2025 plan; they are historical schedules rather than a definitive current roadmap. See the rollout section for the status update as of October 8, 2026. Earlier licensing expectations are also historical. The original schedule was published by Veeva (ir.veeva.com) (www.thegoodinvestors.sg). Throughout, Veeva emphasizes that all AI Agents have direct, secure access to Vault data and work within existing user permissions and workflows (ir.veeva.com) (www.thegoodinvestors.sg).

The accelerated schedule from 2024 onward reflects management's prioritization of AI: in investor commentary, Veeva executives indicated that the Vault CRM platform provides "a fast path to AI productivity" for customers and expected overall industry efficiency to improve ~15% by 2030 (www.thegoodinvestors.sg). Indeed, the initial Agents for CRM and PromoMats, planned for Dec 2025, have already been released as of the end of 2025 (en.antaranews.com) (za.investing.com). The 2026 phases extend benefit to all major functions. In the next sections, we detail each innovation – the CRM Bot, AI Shortcuts, individual AI Agents – and analyze their technical capabilities and potential business impact on Veeva's customers.

Veeva Andi: The First AI for Life Sciences CRM

Veeva's first AI offering, **Veeva Andi**, was introduced in May 2019 as part of Veeva CRM. Branded an "artificial intelligence application," Andi was designed to surface insights and next-action suggestions within the CRM user interface (www.advfn.com). For example, a field rep viewing an HCP record might see Andi suggest scheduling a follow-up meeting based on previous engagement data. Andi leveraged existing CRM data (customer interactions, rep feedback, field responses) to detect patterns: it "gets smarter with every action" by learning from how reps and customers respond (www.advfn.com). In combination with Veeva's new **Customer Journeys** module, Andi helped companies tailor actions to different adoption stages of customers (www.advfn.com). Importantly, Andi gave life science teams control over its behavior: firms could configure rules around triggers (e.g. where on the HCP journey a recommendation should fire) and simulate the impact of insights before delivery (www.advfn.com).

Andi provided insights and next-action suggestions within CRM. **CRM Approved Notes** and **Vault Auto Claims Linking** were separate contemporary AI capabilities: the former detected potential compliance risks in free-text notes, while the latter suggested links between promotional claims and references ([Veeva's 2019 release](#)).

Generative AI Emergence and Veeva's Strategic Response (2023–2025)

The late 2022 debut of ChatGPT and allied generative models created a paradigm shift: suddenly AI could generate natural language summaries, answer questions, and even write drafts with fluency. Life sciences organizations took notice, but adoption lagged due to compliance concerns with cloud AI services using proprietary data. Veeva's strategy was to bring generative AI *into its own secure platform* and marry it with domain knowledge. In April 2024, Veeva announced the **Veeva AI Partner Program** (www.veeva.com), signaling a formal commitment to generative AI. This program gave technology partners access to the new Vault Direct Data API (launched concurrently) and sandbox environments for building GenAI solutions

(www.veeva.com). The Direct Data API was particularly crucial: Veeva explained it as “a new class of API that makes Veeva Vault data accessible up to 100 times faster than traditional APIs” (ir.veeva.com). Customers and partners can use this API to feed bulk or incremental Vault data into cloud analytics and AI tools. (In February 2025, Veeva said connectors to Redshift, Snowflake, Databricks, and Power BI would be included later that year (ir.veeva.com).) In effect, these 2024–2025 moves built the infrastructure to support large-scale AI – secure high-speed data pipelines, training support, and partner ecosystems – with data extraction and LLM-provider controls that customers should review for their own deployments.

In parallel, Veeva product teams began integrating generative features. At their Nov 2024 European Commercial Summit, Veeva unveiled **Vault CRM Bot** and **Voice Control** as upcoming features (www.veeva.com) (www.medicaldevice-network.com). Building on the earlier insights-and-suggestions interface, Vault CRM Bot was envisaged as a full-fledged chat-based assistant: it would “embed the large language model (LLM) of your choice into Vault CRM to enable a wide range of context-driven tasks” (www.veeva.com). In practice, this meant a rep could ask Vault CRM questions or instruct it in natural language (e.g. “what’s next for HCP X?”) and get AI-generated guidance on engagement planning, content recommendations, or educational resources (www.veeva.com). Voice Control would allow hands-free operation: field reps could speak commands (“Log a detail to HCP Y, find last presentation given”) using Apple Intelligence on iOS devices (www.veeva.com). These voice commands integrate with the CRM just like text input. The CRM Bot and Voice Control were slated for “availability in late 2025” (www.veeva.com), leveraging the infrastructure (data API, platform LLM hosting) built in 2024.

Another key April 2025 development was the **announcement of Veeva AI** (www.veeva.com) as a company-wide initiative. Veeva AI formalized the vision: embedding AI Agents and Shortcuts across all Vault apps (commercial, clinical, quality, etc.), all built on the same platform. CEO Peter Gassner emphasized that Veeva AI would “help life sciences companies automate tasks and improve employee productivity using AI Agents and AI Shortcuts” (www.veeva.com). In this vision, generative AI ceases to be an external novelty and becomes a core part of the application fabric. Importantly, Veeva restated that its approach is **LLM-agnostic**: customers can use a Veeva-supplied model or configure Veeva AI to a customer-specific LLM (www.veeva.com), with data remaining securely partitioned per customer. Customers should verify supported providers and deployment controls for their application; model choice alone does not establish regulatory compliance or data confinement. Gassner noted that combining “core applications and GenAI” would yield significant productivity gains (www.veeva.com).

In summary, by mid-2025 Veeva had laid the groundwork for a broad generative AI rollout. It announced data-access infrastructure and upcoming CRM and content-review AI capabilities. The next sections examine the specific features and user experiences – CRM Bot, AI Shortcuts, etc. – that emerged from this roadmap, with attention to how they work and how life sciences organizations might use them.

Vault CRM Bot and Voice Control (Vault Commercial AI)

Vault CRM Bot was announced as embedding the customer’s chosen large language model (LLM); **Voice Control** was announced as leveraging Apple Intelligence on compatible devices ([Veeva’s announcement](#)). Apple’s initial October 2024 availability began with iOS 18.1, iPadOS 18.1, and macOS Sequoia 15.1 on qualifying hardware ([Apple’s launch announcement](#)). This historical OS baseline is separate from current

Veeva feature requirements: Veeva's documentation requires iPadOS/iOS 26 or later and Apple Intelligence to start **Agentic Voice dictation with Siri**. Other Voice Note entry points have different requirements ([Vault CRM for iOS](#)). Customers should verify their supported device, OS, language, and entry point before deployment.

Voice Control leverages the new voice AI in Apple devices (Apple Intelligence). It allows users to control the Vault CRM interface through spoken commands. For instance, a rep might say: *"Update HCP Smith's record: met with Dr. Smith at General Hospital, gave Overview Slide Deck."* The system interprets these commands and performs the updates in CRM on behalf of the rep. This hands-free approach speeds data entry and reduces clicks, which is especially useful when driving between appointments. Apple Intelligence handles the speech recognition and preliminary parsing (www.veeva.com), then Vault CRM applies validation and workflow rules. Voice Control was planned for late 2025, requiring Apple's new AI-driven OS and compatible devices (www.veeva.com).

Implications for Customers (CRM Bot/Voice): These features herald a major behavioral shift. Instead of manually navigating menus and forms, field teams can speak or chat naturally with CRM. Early demonstrations elicited "aha moments" – as one Veeva executive recounted, when customers saw CRM Bot in action, "what they want is ... [AI] to help them with the engagement planning... and then all the data entry afterwards, do that work so they can focus on the engagement in their field" (www.thegoodinvestors.sg). In other words, Vault CRM Bot and Voice Control aim to offload routine cognitive and clerical tasks: analyzing call schedules, generating meeting notes, recommending promotional materials, etc. Field reps will likely see faster call preparation and fewer post-call admin chores, leading to more customer-facing time. Managers and marketers can also query CRM via natural language for dashboards and strategy inputs.

As one customer perspective notes, "Vault CRM and Veeva AI Agents like Pre-call Agent and Voice Agent will drive efficiencies and allow the field to focus on the value parts of their jobs" (en.antaranews.com). While CRM Bot/Voice were announced as new capabilities, the *AI Agents* released in December 2025 (free text, voice, pre-call) realize that vision. The released agents overlap with the tasks described in the earlier CRM Bot announcement: the **Pre-call Agent** performs the engagement-planning suggestions originally promised by CRM Bot, while the **Voice Input Agent** provides the hands-free note-taking. The **Free Text Agent** (see next section) is another output of Vault CRM Bot's concept, focusing on compliance in free-text notes.

From the customer's point of view, adopting Vault CRM Bot means enabling an LLM connection and training reps on new interaction methods. IT teams must ensure quality data in CRM, as the Bot's outputs depend on it. Customers should review each feature's configuration and safeguards and establish appropriate oversight. Overall, CRM Bot and Voice promise significant productivity gains, especially in customer call preparation and follow-up, aligning with Veeva's goal of freeing up technology to serve the field teams (www.thegoodinvestors.sg) (www.thegoodinvestors.sg).

AI Shortcuts: Personalized Automations

Alongside agents built by administrators, Veeva introduced **AI Shortcuts** to empower individual users. AI Shortcuts are lightweight "no-code" automations that any user can define for their own frequent tasks (www.veeva.com). For example, a market access manager might hypothetically create a Shortcut called "Access Brief" that asks the AI to summarize available payer-access notes for human review. Or a field rep

could set up a Shortcut that automatically summarizes the last five call notes for a territory. Customers should verify the supported interface, data access, and output handling for their application before designing a Shortcut.

According to Veeva, Shortcuts empower users to “easily set up personal AI-powered automations to accomplish frequent user-specific tasks such as helping with workflows, generating insights, or researching a topic” (www.veeva.com). In practice, this might replace several mouse clicks with a single question. For instance, rather than manually compiling all pending Quality events, a user could create a Shortcut like “List My CAPAs” that uses AI to filter and summarize them. Shortcuts essentially function like smart macros but powered by generative AI, allowing business users (not just developers) to introduce intelligence into their daily routine. This democratization of AI is a distinct feature: it means every end user can innovate on their own processes. Veeva’s vision is that while AI Agents automate standard processes at scale, AI Shortcuts let each person accelerate their personal workflows without IT intervention.

For customers, AI Shortcuts mean greater agility and user satisfaction. In a hypothetical rollout, users could propose shortcuts tailored to their roles. This can lead to unexpected productivity boosts (and in turn, management may need to govern what shortcuts do in case of compliance risks). It also signifies a cultural change: employees must learn to think of AI as a colleague. Training will be needed so that users know how to craft effective prompts and where to trust the output. Customers should review permissions and governance before enabling user-defined automations. In summary, AI Shortcuts add a layer of user-driven AI that complements the centrally provided agents, giving customers flexible ways to exploit generative AI for each unique role’s needs (www.veeva.com).

Initial Veeva AI Agents Release (December 2025)

In December 2025, Veeva began delivering the first wave of its AI Agents, as promised. Customers should check licensing, setup, and supported platforms before enabling the agents. The **AI Agents** released include:

- **Vault CRM – Free Text Agent:** Automatically reviews free-text call notes entered by field reps and flags potential issues. For example, if a rep’s note contains sensitive off-label information or an untranslated acronym, the agent flags it for the rep’s review to ensure compliance (en.antaranews.com). This agent runs in the background and provides in-depth call reporting, giving companies “richer, higher-quality customer insights” by ensuring accurate data capture (en.antaranews.com).
- **Vault CRM – Voice Agent:** Enables voice-driven data entry into Vault CRM. Reps can speak their call notes or updates, and the Voice Agent transcribes and populates relevant CRM fields (e.g. products used, next steps). This makes it “faster and easier for field teams to capture information and follow-up actions” (en.antaranews.com), since manual typing on mobile devices is time-consuming.
- **Vault CRM – Pre-call Agent:** Provides intelligence before an HCP visit. It scans all relevant data (past activities, existing customer preferences, trending research) and generates a summary of insights and recommended next steps. For example, it might surface that a doctor recently published a paper relevant to the product, or suggest emphasizing a newly released clinical study. In Veeva’s announcement, the Pre-call Agent “provides insights and suggested actions from relevant data, content, activity, and trends that help field reps prepare for calls” (en.antaranews.com).

- **Vault PromoMats – Quick Check Agent:** Performs automated quality checks on content before MLR review. Using editorial, brand, market, and channel guidelines, it scans documents for potential errors or policy violations (e.g. formatting, missing disclaimers). This agent “scans content using ... guidelines to address issues before medical, legal, regulatory (MLR) review” (en.antaranews.com), catching mundane compliance problems early so that the review team can focus on substantive issues.
- **Vault PromoMats – Content Agent:** A more advanced assistant in PromoMats. Given a piece of marketing content (text and images), it can answer questions, summarize the material, analyze visuals, and integrate with Quick Check results. For instance, a compliance reviewer can ask “Does this claim meet our brand standard?” and the Content Agent will reference the appropriate guideline. Veeva describes it as providing “context-aware insights into document text and images, answers questions, summarizes content, analyzes visuals, and draws from Quick Check Agent to assist with review” (en.antaranews.com). The Content Agent essentially acts like an AI copilot for MLR reviewers, understanding the nuances of lifescience content.

The common thread of these agents is that they *operate within the Veeva Vault Platform*, leveraging secure access to the customer’s data and documents. Veeva emphasizes that agents are context-aware: they know the specific Vault application’s terminology and data schema, and they honor user permissions and audit trails (ir.veeva.com) (en.antaranews.com). Customers can also configure the behavior of delivered agents (e.g. define which fields to review) or build new custom agents with Veeva AI tools. As Veeva notes, these agents can be called through a chatbot UI or API, meaning both interactive and automated use cases are supported (www.veeva.com).

Table 2: Veeva AI Agents (Dec 2025) and Their Primary Functions

AI Agent	Application/Domain	Purpose / Description
Free Text Agent	Vault CRM (Commercial)	Analyzes free-text call notes for compliance and accuracy. Flags potential errors or omissions to ensure high-quality data capture (en.antaranews.com).
Voice Agent	Vault CRM (Commercial)	Enables voice input: transcribes spoken call notes and actions into Vault CRM fields. Speeds up data entry for field reps (en.antaranews.com).
Pre-call Agent	Vault CRM (Commercial)	Provides insights/suggestions before customer calls. Summarizes relevant data (history, content, trends) and recommends next steps (en.antaranews.com).
Quick Check Agent	Vault PromoMats (Commercial)	Scans promotional content for adherence to brand and regulatory guidelines. Identifies issues before MLR review (en.antaranews.com).
Content Agent	Vault PromoMats (Commercial)	Analyzes and contextualizes marketing documents. Answers queries, summarizes text/images, and integrates Quick Check findings to assist reviewers (en.antaranews.com).

Table 2 Note: The five agents listed above were available as of December 2025. Additional areas were included in the October 2025 release plan; see the next section for the later 2026 status update. Customers may use these agents via the Vault UI chat interface or API, and can customize them using Veeva’s AI framework.

Customer Impact (Agents): The December 2025 release contained vendor-selected customer feedback and expectations. Moderna's early-access comment described a vision of parts of MLR becoming nearly touch-free; it did not report a measured reduction in review time. Novo Nordisk's comment likewise described expected field efficiencies. These testimonials should not be treated as demonstrated ROI or evidence of dramatic cycle-time reductions ([Veeva's launch release](#)). Customers should evaluate review time, error rates, and staff effort against a documented baseline in their own workflows.

Pricing and Licensing: The April 29, 2025 announcement proposed a Vault-level subscription fee ([original announcement](#)); the October 14, 2025 release described usage-based pricing ([historical pricing announcement](#)). By June 3, 2026, Veeva said pricing and packaging varied by agent: some agents carried usage charges, while others were part of a fixed-price subscription license ([prepared remarks](#)). Customers should check the agent-specific license and commercial terms rather than assume one model covers every feature.

The December 2025 release established available commercial and content-review agents. Subsequent availability should be assessed against the later disclosures discussed below.

2026 Rollout of Veeva AI Agents Across Functions

The October 14, 2025 roadmap scheduled Vault CRM and PromoMats for December 2025, Safety and Quality for April 2026, Clinical Operations, Regulatory, and Medical for August 2026, and Clinical Data for December 2026. These dates describe that historical plan, rather than a definitive current release schedule ([original roadmap](#)).

Status as of October 8, 2026: In June 2026, Veeva scheduled standard agents and custom-agent development across all Vault applications for August. Its August 26 results then reported new standard agents, expanded capabilities for existing agents, and advanced custom-agent development tools. The same results distinguished **Veeva Falcon**, the agentic labor platform for clinical, regulatory, and safety, whose initial go-lives were still planned for later in 2026 ([June prepared remarks](#); [August results](#)). The reported Vault AI milestone should not be interpreted as evidence that every specialized agent or Falcon process was already live.

Product Scope: Clinical Operations and Clinical Data are separate functional areas in the historical schedule. Any proposed use cases below are planning examples rather than documented product capabilities.

Implications for Customers: Teams should verify application-specific availability and configuration before planning deployments. Audit data quality, define who reviews and approves suggestions, arrange training, and manage changes through the organization's existing controls. For a hypothetical quality-workflow pilot, a team could evaluate whether an agent helps reviewers summarize deviation records; the team should first confirm that the chosen agent supports that task. Measure benefits against a baseline rather than infer fewer errors or faster work from a roadmap date.

Customer Perspectives and Case Examples

Several life sciences companies have publicly endorsed Veeva's AI strategy or participated in early access. For customers, the shift from feature announcements to working AI changes the stakes. We highlight real-world reactions and use cases below.

- **Bristol Myers Squibb (BMS):** Greg Meyers, EVP and Chief Digital and Technology Officer at BMS, remarked on the potential of Veeva AI to transform the customer journey: "By embedding AI into every step of the customer journey – from how practitioners receive valuable information about our portfolio to how they engage with our field force – Veeva AI is ideally positioned to support us in our mission to deliver life-changing medicines to patients worldwide" ([en.antaranews.com](https://www.antaranews.com)). This underscores BMS's view that generative AI in Veeva isn't just an efficiency tool, but a strategic enabler of personalized engagement. These are public comments about potential benefits, rather than a measured outcome study.
- **Moderna:** Jason Benagh, Global Marketing Operations Director at Moderna, described early-access experience. He highlighted the **Quick Check Agent** as a game-changer: "What we've learned as an early access user is that the Veeva AI Quick Check Agent moves Moderna closer to a process where parts of MLR could become nearly touch-free... now we can genuinely see how we might get there" ([en.antaranews.com](https://www.antaranews.com)). The comment describes a possible future review process; it does not quantify reductions in iterations, cycle time, or staffing.
- **Novo Nordisk:** Frank Armenante, Director of Field Systems at Novo, commented on the CRM side: "Vault CRM and Veeva AI Agents like Pre-call Agent and Voice Agent will drive efficiencies and allow the field to focus on the value parts of their jobs. It's good for the business, good for HCPs, and great for patients" ([en.antaranews.com](https://www.antaranews.com)). This reflects an important perspective: pharmaceutical field reps want to spend more time with doctors and less time on CRMs. When an AI agent prepares call suggestions or converts notes to data automatically, reps gain valuable time for patient engagement. Novo's view is that these agents don't replace reps but elevate them.
- **Otsuka (Europe):** Debbie Young, a customer insights leader at Otsuka, noted that introducing AI requires organizational buy-in: "Being able to share the innovation with the leadership team and to introduce Veeva AI embedded into our Veeva applications is important to us as we expand our partnership" ([en.antaranews.com](https://www.antaranews.com)). Their perspective underscores that such tools strengthen strategic ties; adopting AI can be a key driver for investing in the Veeva platform itself.
- **Crinetics Pharmaceuticals:** Kea Lingo, CIO of Crinetics (a rare disease biotech), expressed excitement: "We're excited to use the Veeva AI Free Text Agent as part of our strategy toward building AI capabilities into our business. Veeva AI enables us to gain deeper customer insights for more effective engagement in the rare disease space" ([en.antaranews.com](https://www.antaranews.com)). Crinetics' interest highlights a key point: even small/emerging companies see value. The quotation does not establish staffing savings or a measured reduction in costs.

These are vendor-selected public testimonials, not a representative survey or a controlled assessment of efficacy. They include expected benefits and qualitative early-access feedback. The process-flow statement in the release belongs to **Veeva Business Consulting**, which supports business process design and change management as companies define flows among users and agents; it is not an Otsuka quotation ([official launch release](#)).

From an IT governance angle, the year-long rollout schedule itself reflects that adaptation time. Clarkston Consulting advises pharmaceutical QA/QC organizations to build AI governance, validate systems, and establish data/AI literacy well before their domains' launch dates ([clarkstonconsulting.com](#)). Organizations that treat Veeva AI as merely a technical feature, rather than a change in business process, risk underutilizing it. The public comments illustrate interest in adoption; each organization should validate benefits and governance in its own deployment.

Technical and Operational Considerations

Implementing Veeva's AI roadmap involves more than toggling new features – it touches on data, security, and regulatory compliance. We outline key considerations:

- **Data Quality and Integration:** Generative AI is only as good as its input data. Survey data suggests that poor data quality is a top obstacle to AI in pharma ([intuitionlabs.ai](#)). For Veeva customers, this means that CRMs, clinical systems, and quality databases need to be accurate and up-to-date. Duplicate HCP records or outdated patient data will lead agents astray. Hence, organizations should audit their existing Vault data (and any integrated external sources) well before turning on agents. IT should schedule data cleaning before enabling agents in each domain. Before enabling safety-related agents, pharmacovigilance teams should ensure case data is standardized and properly coded. Veeva's Vault Direct Data API helps by making large-scale data dumps possible, enabling easier ETL (extract-transform-load) and analysis for data cleansing, ([ir.veeva.com](#)).
- **Security and Compliance:** Customers should assess the requirements applicable to their intended use, document how outputs are reviewed, and update SOPs and change controls. Review provider, processing region, retention, and contractual safeguards for the selected deployment. Veeva's custom-agent documentation states that the LLM connection sends Vault data to the configured LLM ([configuration documentation](#)). This architecture should be evaluated alongside access controls and audit trails; it does not establish an on-premises deployment option or automatic compliance with a regulation.
- **Governance:** Agent configurations and product releases require ongoing governance. Governance frameworks (AI standards, approval committees, usage policies) will be essential. Leaders should sponsor an organizational "AI Center of Excellence" or similar to oversee usage. Responsibilities include: setting up AI ethics guidelines, monitoring agent performance (look for drift or bias), and managing change control when agent logic is updated. Clarkston notes that the phased release gives companies "time to prepare governance, data architecture, and validation" ([clarkstonconsulting.com](#)). Early preparation will reduce surprises.

- **Training and Change Management:** Employees may initially be wary of AI taking over tasks. Training should focus on verified, high-value use cases, including those discussed in the rollout section, to evaluate benefits. Training programs should emphasize that agents are collaborators, not replacements—for example, a field rep might initially review every AI-suggested visit plan until confidence builds. In clinical/quality, change management will involve training auditors and managers on using agent summaries and verifying them. The quotes above (e.g. Novo's and Crinetics') indicate strong enthusiasm, which management can harness. Yet communication around AI's role, and managing expectations (e.g. being clear that an agent flags suggestions, not final decisions), is vital.
- **Performance and Scaling:** Veeva documents upgrades and new standard agents through product releases three times a year ([Vault AI](#)). Customers should test relevant releases and configuration changes rather than assume models automatically learn from newly entered customer data. Budget for the specific licensed agents and measure latency, reliability, and cost under expected workloads; do not assume universal usage pricing or adequate performance without testing.

Future Outlook and Conclusion

Veeva's AI roadmap – from Andi in 2019 to Vault AI Agents, the CRM Bot announcement, and AI Shortcuts – illustrates the potential of application-specific AI in life sciences. Availability milestones and customer expectations should be separated from measured outcomes. Customers can evaluate whether automation reduces routine work while retaining expert review and oversight.

Beyond efficiency, AI may change how teams work. As hypothetical planning examples, medical affairs teams could evaluate document summaries and regulatory teams could assess drafting assistance where the enabled product supports those tasks. These examples require product-specific verification and human review; they are not evidence of delivered capabilities or customer outcomes.

However, the journey is not without challenges. Along with data preparation and governance, companies should monitor incorrect or misleading outputs, verify relevant source material, and maintain human review. Document how AI outputs are assessed, approved, and incorporated into controlled workflows. Security review should cover the full provider and data-processing path rather than assume data stays inside Vault.

In **conclusion**, Veeva's roadmap combines application-specific AI assistance with user-configurable automation. Public customer comments describe enthusiasm and expected benefits rather than proven, generalizable ROI ([official customer release](#)). Realizing value requires preparation in data quality, training, and governance. Customers should confirm availability and licensing, validate relevant workflows, and measure their own results before scaling adoption.

Sources: Veeva press releases and blogs (www.veeva.com) (www.veeva.com) (www.veeva.com) (ir.veeva.com) (ir.veeva.com) (en.antaranews.com) (www.thegoodinvestors.sg) (www.thegoodinvestors.sg); industry news and analysis (discover-pharma.com) (www.veeva.com) (za.investing.com) (www.medicaldevice-network.com); customer and analyst commentary (en.antaranews.com) (clarkstonconsulting.com), among others. Sources include historical announcements and commentary; planned benefits should not be interpreted as independently demonstrated outcomes.

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AI consulting and adoption

Our AI enablement services cover readiness assessments, use-case selection, governance and policies, team workshops, adoption measurement and ongoing advisory support. We help organizations structure the information layer behind AI: source material, context, permissions and maintained knowledge that make generated answers useful and reviewable. Private LLM inference and hosted AI options support teams evaluating how to operate AI with appropriate control over their data and infrastructure.

Software, data and life-science workflows

IntuitionLabs develops custom software for pharma and biotech, integrates enterprise systems, and builds data engineering and business intelligence solutions. Areas of focus include AI agents, regulatory research, medical writing, medical affairs, CMC information, competitive intelligence and clinical-document workflows. Our eTMF intelligence work includes cross-system reconciliation and inspection-readiness support.

Enterprise platforms and regulated delivery

We provide Veeva services, application support, managed services, integrations and custom applications, alongside enterprise content work involving platforms such as Egnyte. For regulated workflows, our services include GxP enablement, computer-system validation and software development addressing 21 CFR Part 11 requirements. The applicable controls, validation responsibilities and acceptance criteria are defined for each engagement.

Work with IntuitionLabs

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