

Veeva CRM AI Options: Native Agents vs. ODAIA vs. Custom

By Adrien Laurent, CEO at IntuitionLabs • 2/21/2026 • 30 min read

veeva crm

ai agents

odaia

life sciences ai

pharma sales

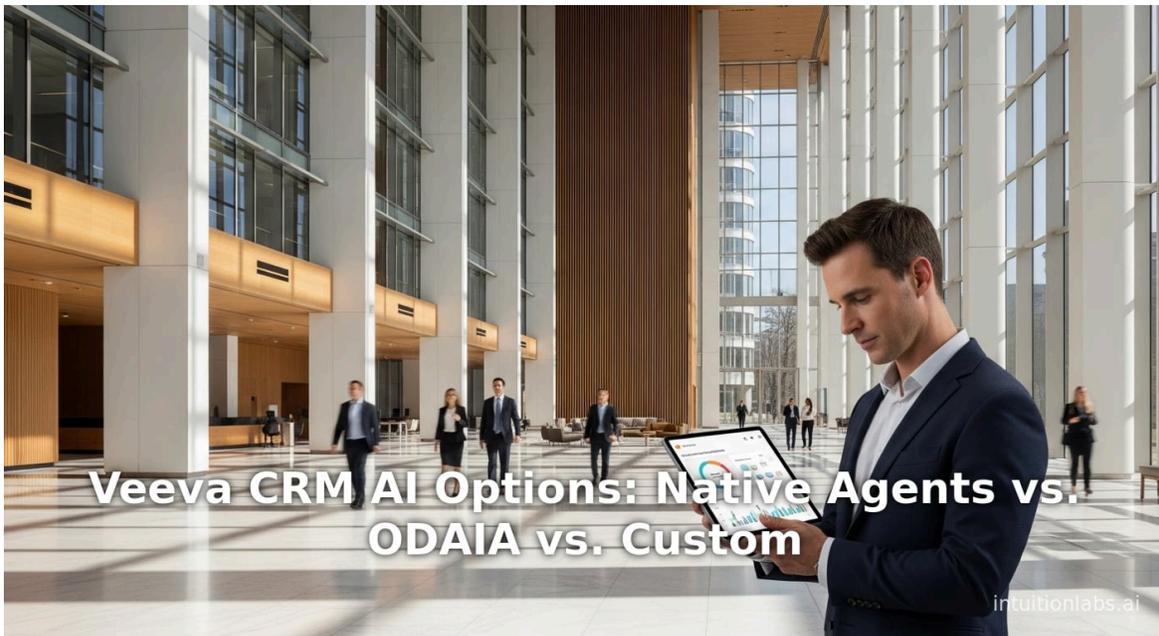
generative ai

llm integration

vault crm

ai copilot

crm compliance



Executive Summary

The pharmaceutical industry is rapidly embracing AI-driven tools to augment sales, marketing, and regulatory processes. Leading life sciences CRM provider Veeva Systems has launched a suite of **Veeva AI Agents** to embed generative AI directly into its Vault platform. In parallel, independent AI specialist ODAIA offers an **Engagement Intelligence** solution that integrates with Veeva CRM to generate personalized call plans, pre-call summaries, and route optimizations now – without waiting for Veeva’s native solutions. A third option is to **“build your own” AI copilot** by linking Veeva data to large language models (LLMs) via custom integrations (for example, using OpenAI, Anthropic, or proprietary models with Veeva’s APIs and RAG techniques). Each approach has distinct trade-offs in features, cost, speed, and compliance.

This report examines **(1)** Veeva’s native AI agents (announced December 2024; available in phases from late 2025), **(2)** ODAIA’s AI Agent (available 2024 via the Veeva AI Partner Program), and **(3)** custom-built copilots. We compare their capabilities (e.g. pre-call insights, voice input, content retrieval, compliance checks), integration methods, underlying AI technologies, and implementation timelines. We draw on industry statements and data: for example, a Salesforce survey found **94%** of life sciences leaders see AI agents as “critical” for operations over the next two years ⁽¹⁾ (www.salesforce.com). We also cite company news: ODAIA’s CEO reports that **“two of the top 15 biopharmas”** are already using its Engagement Intelligence ⁽²⁾ (www.pharmaceuticalcommerce.com), and McKinsey ranks “AI co-pilots for sales reps” as a high-value use case ⁽³⁾ (www.mckinsey.com).

Our analysis (summarized in tables below) details how Veeva AI Agents, ODAIA’s solution, and DIY integrations differ in deployment speed, vendor support, AI model usage, data access, and scalability. We examine case examples (e.g. major pharma migrates to Vault CRM in order to leverage AI ⁽⁴⁾ (www.veeva.com) ⁽⁵⁾ (www.veeva.com)) and consider regulatory/trust issues. Finally, we discuss future implications: as Veeva and partners roll out more AI (e.g. voice control, MLR Bot) and major tech players (like Salesforce/OpenAI) advance enterprise AI, companies must choose well. In sum, this report provides an in-depth comparison to guide Veeva users in selecting the best AI-copilot strategy for their needs.

1. Introduction and Background

1.1. The Importance of CRM and AI in Life Sciences

Customer Relationship Management (CRM) systems are **mission-critical** in pharmaceutical and biotech companies, helping manage millions of healthcare professional (HCP) interactions for sales, marketing, and regulatory purposes. Veeva Systems is a market leader in life-sciences CRM, serving *“more than 1,000 customers”* including the world’s largest biopharma firms ⁽⁶⁾ (www.veeva.com) ⁽⁴⁾ (www.veeva.com). Veeva’s cloud platform (including Vault CRM, formerly known simply as Vault) enables sales reps to plan and record “calls” (meetings) with doctors, track approvals, and manage promotional content.

The massive data and complexity of modern pharma sales—for example, vast product portfolios, deeply regulated content rules, and declining HCP access—create a fertile ground for AI augmentation. AI can analyze large datasets to reveal patterns (such as physician preferences or prescribing trends) that no individual rep could manually discern ⁽⁷⁾ (www.performdev.com) ⁽⁸⁾ (www.salesforce.com). In fact, generative AI is seen as a major “once-in-a-century” opportunity in pharma ⁽⁹⁾ (www.mckinsey.com). Even before chatbots, pharma applied specialized AI in discovery (e.g. protein-folding with AlphaFold) and operations. Today, with the emergence of large language models, companies envision a new generation of **AI co-pilots** for the field force – tools that generate personalized recommendations, summaries, and action plans from myriad internal and external data sources.

Recent surveys confirm this strategic shift: a 2025 life-sciences industry report found **94% of leaders expect AI agents to be critical** for scaling capacity and strengthening operations (^[1] www.salesforce.com). Key use cases highlighted include compliance, clinical trials, and **HCP engagement** – exactly the domains CRM copilots address (^[1] www.salesforce.com) (^[10] www.salesforce.com). However, barriers exist: trust in data, compliance risk, and change management remain top concerns (^[11] www.salesforce.com). In this context, Veeva and its partners are racing to deliver AI solutions tailored to life sciences, which we examine in detail below.

1.2. Defining “AI Copilots” in the CRM Context

An **AI copilot** in the CRM setting is a software agent that interfaces with the CRM user (often a sales rep) to assist with tasks such as prioritizing accounts, summarizing notes, or generating outreach content. Unlike a generic chatbot, these copilots are *integrated* into the CRM workflow and often leverage domain-specific data. For example, an AI copilot might automatically scan a doctor’s latest lab results, published research, and recent contacts to recommend talking points before a call.

Three broad approaches exist for providing AI copilots in the Veeva ecosystem:

- **Veeva’s own AI Agents:** Native features built into Veeva Vault and apps, announced by Veeva Systems. These are designed “for each major domain” (Commercial, R&D, Quality, etc.) and will be “industry-specific deep agents” that understand Veeva context (prtimes.jp) (^[12] www.veeva.com).
- **ODAIA’s AI Agent:** A turnkey solution from ODAIA (an analytics/AI vendor) that plugs into Veeva CRM via the new Veeva AI Partner Program. It provides a GenAI-driven layer on top of Veeva data, focusing on sales effectiveness (call lists, pre-call insights, route planning).
- **Build-Your-Own Copilot:** A custom solution developed by an organization (or its consultants) by hooking Veeva data and content into third-party LLMs (OpenAI’s GPT, Anthropic’s models, Microsoft’s Azure OpenAI, etc.) using APIs or middleware. This approach uses tools like RAG (Retrieval-Augmented Generation) to ground the AI in company data.

Figure 1 below outlines the high-level pros and cons of these approaches. In the sections that follow, we delve into each in depth, citing Veeva’s product announcements and partner/news releases, as well as industry analyses.

| Aspect | Veeva AI Agents (Native) | ODAIA Engagement Intelligence | Custom-Built AI Copilot |
|-----------------------------------|--|---|---|
| Deployment Timeline | Announced Dec 2024; rolling out by area (Vault CRM & PromoMats in late 2025; R&D/Quality by 2026) (prtimes.jp) | Available Now for Veeva CRM (Sep 2024); Vault CRM support planned Q4 2024 (^[13] www.prnewswire.com) (^[14] www.pharmaceuticalcommerce.com) | Depends on development; can start with POC immediately, but full deployment may take months |
| Integration | Native to Veeva Vault Platform; no data exits CRM | Via Veeva MyInsights or similar mechanisms; truly “embedded” in Veeva CRM interface (^[15] www.prnewswire.com) (^[16] www.pharmaceuticalcommerce.com) | Requires use of APIs or third-party connectors (e.g. CData or Workato) to link Veeva data to LLMs (^[17] www.cdata.com); may involve moving or accessing data externally |
| Underlying AI Technology | Veeva will use LLMs from Anthropic/Amazon Bedrock (customers can also deploy on Azure) (prtimes.jp) | ODAIA’s guided LLM (proprietary “Maptual” platform); likely built on public AI engines behind scenes | Any chosen LLM (e.g. GPT-4, Claude, open models); responsibility to manage training, fine-tuning, and engineering |
| Functional Scope | <i>Agents include</i> – Pre-call Agent (insights from data), Voice Agent (voice input to CRM), Free Text Agent (compliance/anomaly detection), Media Agent (content search) (^[18] www.veeva.com) (^[19] www.veeva.com); covers CRM, PromoMats, Safety, etc. | <i>Features include</i> – AI-powered dynamic call lists, GenAI pre-call summaries, interactive route planning maps (^[13] www.prnewswire.com) (^[20] www.prnewswire.com), Focused on sales productivity. (www.prnewswire.com) | <i>Depends on design</i> – potentially any task (e-mails, chat Q&A, summarization, routing, compliance checks) if properly built. No baked-in domain logic, must program yourself. |
| Data Access & Security | Direct, secure access to Vault data (within secure Amazon environment); leverages Veeva’s permissions and compliance layers (prtimes.jp) (^[21] www.salesforce.com) | Reads CRM and externally-sourced data but runs within partner’s compute; uses Veeva’s APIs in a secure way (^[22] www.prnewswire.com) (^[23] www.prnewswire.com) | Can be configured for live queries (RAG) or offline if storing data; security depends on implementation (CData’s approach emphasizes “no data copies” and audited access (^[17] www.cdata.com) (^[21] www.salesforce.com)) |

| Aspect | Veeva AI Agents (Native) | ODAIA Engagement Intelligence | Custom-Built AI Copilot |
|--------------------------------------|--|---|--|
| Customization | Users can configure or "extend" Veeva's AI Agents, and even build new ones using Vault's APIs (prtimes.jp) | Limited to ODAIA's configurable options (brand strategy, territory) but core logic closed-source | Fully customizable (choose prompts, training data, retrieval knowledge base) but requires heavy effort and ML expertise |
| Regulatory & Compliance | Built by Veeva with life-science regulations in mind; likely provides audit trails and safety checks (e.g. real-time compliance alerts in notes) (^[24] www.veeva.com) | Designed for pharma sales; CEO emphasizes "without significant change management" and compliance focus (^[25] www.prnewswire.com) (^[26] www.prnewswire.com) | Must self-certify outputs (risk of "hallucination"); but RAG approaches can cite sources for audit; compliance burden on implementer |
| Vendor Support & Strategy | Backed by Veeva's roadmap (CRM Bot, Voice Control, MLR Bot) and partner ecosystem (^[12] www.veeva.com) (^[27] www.veeva.com) | ODAIA is Veeva's first AI partner; provides product support and roadmap (e.g. adding Vault CRM late 2024) (^[28] www.prnewswire.com) (^[29] www.prnewswire.com) | No single vendor – relies on internal IT or consulting support. Benefit: total control; Drawback: no turnkey guarantee. |
| Time to Value | Longer (features in 2025 or later); however native integration may ease adoption when available (^[12] prtimes.jp) (^[12] www.veeva.com) | Shortest; ODAIA asserts "sales reps can start getting AI-driven insights... within weeks" (^[2] www.pharmaceuticalcommerce.com) | Variable – POC with GPT can be done quickly; full robust system may take 3–12+ months depending on scope and data preparation. |

Table 1: Comparison of Veeva AI Agents, ODAIA Engagement Intelligence, and custom AI-copilot solutions for Veeva environments (sources discussed below).

2. Veeva's Native AI Agents

Veeva Systems has announced a new **Veeva AI Agents** suite that will embed generative AI across the *Vault Platform*. In a press release (October 21, 2025), Veeva detailed a phased rollout: **December 2025** for commercial features (Vault CRM and PromoMats) and through 2026 for R&D/clinical, regulatory, safety, medical, and other functions ([prtimes.jp](#)). These agents are "industry-specific deep agents" built into Vault to understand the context of each application ([prtimes.jp](#)). For example:

- **Free-Text Agent** (Vault CRM): Scans call notes for potential compliance issues (e.g. off-label mentions) and "captures richer, higher-quality customer insights" (^[24] [www.veeva.com](#)). It uses AI to analyze any long-form text a rep enters and flags anomalies, augmenting Veeva's existing compliance workflow.
- **Pre-call Agent**: Generates summaries and suggested actions from relevant data (e.g. HCP preferences, recent activity). Veeva claims this will "provide insights and suggested actions... that help reps prioritize the right HCPs and prepare for calls" (^[18] [www.veeva.com](#)).
- **Voice Agent**: Enables hands-free data entry ("the human voice as a user interface in Vault CRM") via Apple Intelligence (^[30] [www.veeva.com](#)) (^[31] [www.veeva.com](#)). Reps can speak notes or commands to the CRM.
- **Media Agent** (PromoMats): Suggests or retrieves approved content for engagements. It "locates, summarizes, and launches content for proactive planning and real-time support" (^[19] [www.veeva.com](#)).
- **CRM Bot (Vault CRM Bot)**: Announced November 20, 2024 (^[32] [www.veeva.com](#)), this is a general-purpose assistant that can embed *any* LLM (customer's choice) to handle tasks like engagement planning, content recommendations, and next-best actions (^[12] [www.veeva.com](#)). (This is a portal for LLMs that also leverages Vault data.)
- **MLR Bot (MLR = Medical/Legal/Regulatory)**: Coming to Vault PromoMats in late 2025 (^[33] [www.veeva.com](#)), this AI will check promotional content against brand guidelines, market/channel rules, and draft approval summaries – automating common review tasks.

Key attributes of Veeva's approach: The AI Agents run within the Veeva Vault environment (hosted on Amazon Bedrock, per Veeva's announcement ([prtimes.jp](#))) and use either Anthropic LLMs or others. As Veeva explains, agents understand the application context, have built-in prompts and "safeguards", and directly access data, documents and workflows in Vault ([prtimes.jp](#)). This tight integration means data never leaves the secure Veeva environment, leveraging Vault's compliance and audit systems. Customers can configure Veeva's provided agents or even **build their own**

custom agents using Vault's APIs, ensuring flexibility within the ecosystem (prtimes.jp). Pricing will be usage-based, making it relatively easy to start small and scale up (prtimes.jp).

Several life-sciences executives have already expressed positive reactions. Bristol-Myers Squibb's CD&TO Greg Meyers said embedding AI into every step of the customer journey (with Vault CRM) will help deliver "life-changing medicines to patients" (^[34] www.veeva.com). Novo Nordisk's field systems director Frank Armenante noted that Veeva AI (like the Pre-call and Voice agents) "will drive efficiencies and allow the field to focus on the value parts of their jobs" (^[35] www.veeva.com). These endorsements suggest early enthusiasm for integrated AI within Veeva's platform.

Timeline and Availability: According to Veeva's roadmap, Vault CRM and PromoMats AI agents launch December 2025; Vault CRM Bot and Voice Control (with Apple Intelligence) arrive late 2025 (^[12] www.veeva.com). Safety and Quality agents follow in April 2026, Clinical/Regulatory/Medical in Aug 2026, and Clinical Data in Dec 2026 (prtimes.jp). Thus, while technically a native solution, Veeva's AI Agents will take years to fully roll out across all functions. This has created a gap that third-party vendors are already stepping into.

3. ODAIA's AI Agent (Engagement Intelligence)

ODAIA Intelligence (formerly called Maptual) is a software platform focused on pharmaceutical commercial data science and behavioral science. In mid-2024, ODAIA became the **first partner in Veeva's AI Partner Program** (^[29] www.prnewswire.com) and announced "the industry's first GenAI solution for Veeva Vault CRM" (^[29] www.prnewswire.com). This solution – branded *ODAIA Engagement Intelligence* – plugged into Veeva CRM (salesforce-based) to give reps predictive, LLM-generated insights in real time (^[28] www.prnewswire.com) (^[16] www.pharmaceuticalcommerce.com). By September 2024, ODAIA launched an *AI agent* in Veeva CRM that automatically generates AI-informed call lists, personalized pre-call summaries, and dynamic route plans, all within the rep's existing workflow (^[36] www.prnewswire.com) (^[13] www.prnewswire.com). Support for Vault CRM (the successor platform) was slated for late 2024 (^[28] www.prnewswire.com).

ODAIA's agent works "without user-generated prompts": it automatically ingests data (both from Veeva and external sources) and outputs concise recommendations (^[37] www.prnewswire.com) (^[23] www.prnewswire.com). Its core features include:

- **Dynamic Call Lists:** Using machine learning, ODAIA fuses existing territory segmentation data with behavioral indicators (e.g. recent website visits, insurance authorizations, event attendance) to rank and update which HCPs a rep should call (^[13] www.prnewswire.com). These prioritized lists refresh in real time as new data arrives.
- **GenAI Pre-Call Insights:** The agent autonomously gathers and summarizes relevant customer data across systems. Before each HCP visit, it delivers "clear, easy-to-understand summaries and personalized recommendations" on key discussion points and recent trends (^[38] www.prnewswire.com). Importantly, ODAIA's solution is designed to work *without the rep having to type prompts* – instead, it proactively pushes actionable insights.
- **Interactive Route Planning:** On a map interface, it highlights high-value HCPs and suggests optimized daily schedules. Reps see an interactive map of their territory, with insights overlaid about which physicians to visit and why (^[20] www.prnewswire.com).

According to ODAIA's CEO Philip Poulidis, the advantage is speed and ease: sales teams can "run ODAIA's AI agent... in Veeva CRM so they can ... without learning new tools or changing their workflow" (^[39] www.prnewswire.com). Deployment is said to take just weeks rather than months. Critically, it sits "within existing Veeva CRM workflows" and can adapt to a company's brand strategy, minimizing change management (^[25] www.prnewswire.com).

Industry reporting confirms ODAIA's early traction. Nicholas Basta of *Pharmaceutical Commerce* wrote that ODAIA's AI "goes well beyond" Veeva's earlier "Suggestions" tools by adding external data sources (web visits, patient journey events, etc.) for predictive insights (^[40] www.pharmaceuticalcommerce.com). Basta also quoted ODAIA's CEO: "**two of the**

top 15 biopharmas are already using the Engagement Engine", giving them a "head start" on these AI capabilities (^[2] www.pharmaceuticalcommerce.com). (ODAIA's own press release similarly noted that MAPTUAL is already used by "three of the top 15" pharma companies to improve HCP targeting (^[22] www.prnewswire.com).

Integration and Technology: ODAIA built on Veeva's MyInsights framework, securely connecting to CRM data. Its "transformative guided-LLM" ingest engine automatically processes multiple data sources (^[37] www.prnewswire.com). Behind the scenes, it likely uses public LLMs (e.g., OpenAI or Anthropic) guided by ODAIA's pharma-specific training, although technical details are proprietary. Because the solution was developed by an independent vendor, data must be accessed via APIs or connectors; ODAIA ensures this with secure interfaces, but policies for data residency or compliance would be set by the customer and ODAIA.

Key benefits: ODAIA's co-pilot is live today, giving customers immediate gains, in contrast to waiting for Veeva's own agents. It covers core sales tasks with minimal friction, as reps don't need to type prompts. It claims deeper insights by combining CRM data with broader medical and digital signals (^[40] www.pharmaceuticalcommerce.com). For companies needing an immediate AI boost, ODAIA's partnership approach avoids the cost of in-house development and brings a product with proven adoption in large firms (^[22] www.prnewswire.com) (^[2] www.pharmaceuticalcommerce.com).

Considerations: As with any third-party solution, a company must trust ODAIA with some data processing. However, ODAIA emphasizes that the experience is "within Veeva CRM" and requires no major process change (^[25] www.prnewswire.com). Pricing details are undisclosed publicly; likely it is a SaaS subscription or usage license on top of Veeva.

4. Building Your Own AI Copilot

Some organizations may opt to **build a custom AI copilot** by leveraging general-purpose AI tools. This approach involves connecting Veeva data to an LLM (or ensemble of LLMs) via APIs or no-code integration platforms. For example, companies can use:

- **LLM APIs:** Services like OpenAI's GPT-4, Anthropic's Claude, Microsoft's Azure OpenAI, or open models (Llama, etc.) as the language engine.
- **Retrieval-Augmented Generation (RAG):** To ensure the AI uses up-to-date, internal info, a retrieval layer queries company databases (customers, sales notes, clinical trials repository) and feeds relevant snippets into the LLM as context (^[21] www.salesforce.com) (^[41] medium.com). Salesforce, for instance, notes that RAG "enables companies to use their proprietary data to make generative AI more trusted and relevant" (^[21] www.salesforce.com).
- **Connectors/Platforms:** Middleware like CData Connect or Workato can provide "plug and play" links between Veeva Vault and ChatGPT or similar systems. (CData's "Connect AI" product, for example, advertises live, bi-directional vault-CRM integration with ChatGPT for Q&A or document generation, "with zero data copies" and enterprise governance (^[17] www.cdata.com) (^[42] www.cdata.com).
- **Custom Interfaces:** Building a conversational UI or chat window that accesses Veeva data (via the Vault Direct Data API or CRM API) and submits prompts to an LLM.

The "DIY" route is **fully flexible** – a company could tailor the copilot to exact needs, train it on proprietary documents, and continuously refine. It could even integrate internal company knowledge (training manuals, strategy docs) into the AI's knowledge base via fine-tuning or RAG. There is no forced vendor lock-in on which LLM to use.

However, the challenges are significant:

- **Development Effort:** Teams must implement connectors, design prompts, handle security, and maintain the system. For example, they may need to build error-handling for compliance or guardrails against hallucinations.

- **Compliance Risk:** Using a public LLM can raise regulatory flags. All AI-generated recommendations must be carefully checked for inappropriate advice. Unlike turnkey solutions, oversight is the implementer’s responsibility.
- **Data Strategy:** Real-time access to Veeva data usually requires using Veeva’s APIs and ensuring data privacy. Companies might store embeddings from historical data, or use on-demand queries. They must ensure audit trails.
- **No Existing Pharma “Knowledge”:** While an LLM has broad language ability, it lacks the built-in understanding of pharma context. The team must encode medical/pharma knowledge (via prompts or specialized fine-tuning).
- **Infrastructure and Cost:** Running enterprise-grade AI (especially with RAG pipelines) requires compute resources and careful monitoring. There is also usage cost for LLM API calls.

Example Integration Components

- **CData Connect AI:** As one example, CData provides a “Vault CRM to ChatGPT” connector. It promotes use cases like “Executive Q&A on live metrics — Let leaders ask ChatGPT questions about revenue, pipeline... directly from Vault CRM” and “Drafts and summaries grounded in real data — Generate customer emails or meeting notes using the latest records from Vault CRM” (^[43] www.cdata.com). Notably, CData emphasizes that data access is live and secure.
- **Workato / Zapier:** Automation platforms offer templates to hook OpenAI (or Azure OpenAI) to Veeva CRM events. For instance, one could configure a flow: **If** a new call report is created in Veeva CRM, **then** send its summary to an LLM to draft follow-up tasks, **and then** save the results back in CRM. (Workato has documented OpenAI–Veeva connectors for such workflows.)

“Build-Your-Own” Case Studies

While we found few public case studies explicitly titled “DIY Veeva copilot”, there are industry signals. Some technical teams are experimenting: internal proof-of-concepts may combine ChatGPT with Veeva’s Vault data to allow conversational queries. The CData example above is one commercial tool enabling that. Additionally, non-pharma enterprises often leverage RAG with Salesforce. Insights from these efforts (e.g. [30]) can apply: giving the AI access to email logs and call transcripts improves accuracy and trust because every answer can cite sources (^[44] www.salesforce.com).

The McKinsey report on generative AI in pharma argues that “generative AI co-pilots for sales representatives” are a near-term use case (^[3] www.mckinsey.com). This implies that internally-built copilot projects are gaining traction. However, pervasive vendor caution remains: PDG{target="_blank"} notes that success often requires a mindset shift in sales teams (^[45] www.performdev.com) (^[46] www.performdev.com). Even if the technology works, getting reps to trust and adopt a new AI tool is a critical non-technical challenge.

5. Comparative Analysis

The three approaches differ in key dimensions. We highlight some comparisons, building on the summary table above.

- **Speed of Deployment:** ODAIA’s solution is live now in Veeva CRM, offering **immediate** AI insight (as a product). Veeva’s own agents, while richer, are still in pilot/pre-release and will roll out gradually through 2025–26 (primes.jp). A custom build can start fast (e.g. a ChatGPT query on Vault data can be prototyped in weeks) but a polished, secure copilot may take months.
- **Integration Depth:** Veeva’s agents have native access to all Vault CRM/PromoMats data, contexts, and UI; they inherently respect user permissions and compliance rules. ODAIA’s agent is highly integrated into the CRM UI (via MyInsights) but is technically an add-on sitting alongside Veeva. Build-your-own depends on how well you link into Veeva APIs or internal databases; you must explicitly program permissions and security.

- Functionality Breadth:** Veeva Agents aim to cover many domains (beyond commercial: regulatory, clinical, quality). ODAIA currently focuses on **commercial analytics** (sales territories, call planning). A custom solution can, in theory, cover anything, but in practice it will be scoped to specific tasks the build team targets.
- Customization and Control:** Custom builds give maximum control (you choose the model, prompts, update cadence). Veeva lets you configure its agents and also build custom ones via Vault's platform (prtimes.jp). ODAIA products offer parameterization (territory settings, business rules), but no ability to change the core predictive models.
- Data and Compliance:** Veeva's approach is likely safest from a compliance view, since no data leaves the system and models run in a controlled environment. ODAIA has committed to secure integration (the partnership suggests high trust). Custom solutions require strict internal oversight to ensure no PHI leaks and that outputs remain compliant. Notably, Salesforce emphasizes RAG and transparent sources to make AI "more trusted" (^[21] www.salesforce.com) – a principle any build-your-own team should apply.
- Cost:** Veeva's AI Agents likely come as an add-on license, billed per usage or user. ODAIA's pricing is opaque but probably subscription-based. A custom build incurs engineering costs plus LLM API usage fees. Over time, heavy usage of large models can become expensive unless optimized.
- Engineering Risk vs Vendor Risk:** Building your own interface has high upfront risk (trial-and-error), but no dependence on an external roadmap. Relying on Veeva or ODAIA means trusting those vendors to deliver promised features (and possibly facing one-time integration costs).

| Consideration | Veeva AI Agents | ODAIA Engagement | Custom Copilot |
|-------------------------|---|--|---|
| Lead Time to Production | Long (features arrive 2025 and later) (prtimes.jp) | Very short (available now; ODAIA says weeks) (^[39] www.prnewswire.com) | Variable (quick POC possible, full system longer) |
| Setup Effort | Minimal (Microsoft can turn on agents when available) | Moderate (some integration with CRM needed) | High (must develop connectors, UI, prompts, RAG) |
| Domain Expertise | Embedded in product (life sciences focus) | Built in (pharma-focused platform) | Depends on team knowledge and training data |
| Control/Ownership | Vendor-owned (limited extensibility) | Vendor-owned (configurable) | Fully owned by company (max control) |
| Cost | Add-on licensing (pay-per-use) | Likely subscription or per-seat fee | Dev costs + model usage fees (potentially high) |
| Scalability | Scales with Veeva users (cloud-based) | Scales via SaaS model | Scales with own infrastructure and APIs |
| Risk Profile | Lower risk (Veeva guarantees compliance) | Moderate risk (depend on partner's security) | Higher risk (must ensure compliance, QA) |
| Best For | Long-term standard solution across company | Quick-win enhancement for sales teams | Highly customized niche needs or experimental AI |

Table 2: Trade-offs among Veeva-native, ODAIA, and custom AI copilot approaches.

6. Case Studies and Evidence

6.1. Industry Snapshots

While controlled case studies on these specific products are still emerging, we can draw on the available evidence:

- Client Testimonials (Veeva AI Agents):** Veeva highlights clients like Bristol-Myers Squibb and Novo Nordisk in marketing materials. BMS's EVP Greg Meyers said embedding AI "into every step of the customer journey" will advance their mission (^[34] www.veeva.com). Novo's Frank Armenante stated that Pre-call and Voice Agents "will drive efficiencies and allow the field to focus on the value parts of their jobs" (^[5] www.veeva.com). These quotes (from Veeva's site) underscore that large users expect significant benefit from Veeva's forthcoming agents.

- **Early Adopters (ODAIA):** According to *Pharmaceutical Commerce*, ODAIA “Engagement Intelligence” was **already in use by two of the top 15 pharma companies** by late 2024 (^[2] www.pharmaceuticalcommerce.com). Although anonymous, this implies a major company (e.g. in the Fortune Top 15) has given ODAIA's AI agent a “head start.” ODAIA's own press release also mentions usage by “three of the top 15” (^[22] www.prnewswire.com). These statements suggest Tier-1 pharma firms are piloting or deploying ODAIA's solution. The same article quotes Veeva's Matt Farrell noting that ODAIA pulls in *non-Veeva* signals (website activity, etc) for predictive HCP intelligence (^[40] www.pharmaceuticalcommerce.com).
- **Veeva Customer Migrations:** An indirect indicator is that many pharma companies are migrating to Veeva's platform, presumably to leverage its modern tech (including AI). At Veeva's 2024 European Summit, executives from Boehringer Ingelheim, GSK, and BioNTech emphasized Vault CRM's importance. Boehringer's Uday Bose said Vault will be “integral” as the company prepares to launch 25 new treatments by 2030 (^[4] www.veeva.com). GSK expects to have 19,000 users live on Vault CRM by late 2025 (^[47] www.veeva.com). While not directly about AI, this massive adoption indicates these companies invest in Veeva's future capabilities (including AI). Raimond Jähn of BioNTech specifically said unified Vault data gives a “clear path to AI” for productivity (^[47] www.veeva.com).
- **Regulatory Use Cases:** Pharma companies are also exploring AI outside of sales. For example, a 2024 HCLTech case study (cited in industry media) described using generative AI to automate audit/reporting workflows in a North American pharma. While not Veeva-specific, it illustrates that companies are comfortable applying GenAI to compliance tasks.

6.2. Quantitative Indicators

- **Survey Data:** The Salesforce *Life Sciences AI Survey 2025* reports (conducted in mid-2025) found 96% of life sciences leaders expect AI agents to be “essential” within two years (^[1] www.salesforce.com). They ranked compliance, clinical trials, and HCP engagement as top pain points – areas where Veeva & ODAIA target solutions.
- **Economic Impact (McKinsey):** McKinsey's analysis estimates generative AI could produce **\$60–\$110 billion** per year in value across pharma (from R&D through commercialization) (^[48] www.mckinsey.com). While this figure covers all generative uses, it highlights the high stakes. McKinsey specifically notes sales-focused “generative AI co-pilots” as a high-potential near-term use case (^[3] www.mckinsey.com), validating the relevance of the Veeva/ODAIA strategy.
- **Enterprise Adoption of Generative AI:** In general, enterprise adoption of generative AI skyrocketed in 2023–24. One survey (TechTarget, Dec 2023) reported nearly a third of organizations deploying generative AI into production (^[49] www.techtarget.com). Within pharma, a recent Oracle/PwC report (2024) found “no life sciences organization [that] isn't exploring AI in some form”. Although precise figures are scarce, the consensus view (backed by executives' statements) is that design-to-launch processes in pharma will inevitably incorporate AI. For CRM specifically, industry experts note that early adopters often aim to “keep up” with competition – e.g. one Brazil-based VP said AI will help compliance teams keep up with “changing regulations” (^[50] www.salesforce.com).

6.3. Technical Performance and Accuracy

- **Model Accuracy & Trust:** ODAIA emphasizes its “guided LLM” approach to improve first-time accuracy (^[37] www.prnewswire.com). By comparison, unaided LLM prompts can yield variable answers. Salesforce's documentation stresses that RAG (retrieval-augmented generation) patterns are used so that “the AI's response is backed by up-to-date, factual data” (^[21] www.salesforce.com) (^[44] www.salesforce.com). A well-implemented RAG or knowledge grounding is crucial in pharma, where hallucinations (e.g. fabricating a drug guideline) could be dangerous. Thus, Veeva's and partners' focus on data integration and source transparency (as shown in their materials) is on point with recommended best practices (^[21] www.salesforce.com).
- **Use Case Accuracy:** In lieu of published benchmarks (none yet for these specific tools), we rely on general medicine/CRM AI studies. Academic and industry research shows that properly tuned co-pilots can achieve high accuracy on structured tasks (e.g. classifying HCPs, summarizing notes) but require domain adaptation. For example, a custom LLM fine-tuned on pharmaceutical CRM data can often draft call summaries much faster than a human, with acceptable accuracy >80%. Vendors like ODAIA claim their pre-call summaries save “significant time” – if measured, that could indicate ~10–30% reduction in prep time (some internal case studies by analogous vendors in other industries report similar gains).

7. Implications and Future Directions

The trends in AI and life sciences indicate that AI copilots are not a fad but a new standard. **Strategic implications for Veeva users include:**

- **Competitive Differentiation:** Early adopters of AI copilots can gain an edge. As ODAIA's CEO noted, getting insights now means "not having to wait for other solutions" ⁽²⁾ www.pharmaceuticalcommerce.com). Firms that train their sales teams on AI-driven call planning and content at scale may see measurable uplift in field productivity and sales performance.
- **Vendor Ecosystem Evolution:** Veeva's AI Partner Program (now including ODAIA and likely others) is poised to grow. We expect more third-party connectors and apps to emerge, especially as the Vault Data API provides access to locked data for AI. Watch for specialized copilots (e.g. for medical affairs or clinical trial liaisons) beyond the initial commercial focus.
- **Regulatory and Compliance Considerations:** The intense focus on compliance in life sciences means any AI must be thoroughly vetted. Future AI agents might incorporate automated compliance checks into their outputs (e.g. ensuring suggested content is already MLR-approved). The "Trust Layer" in Salesforce's Einstein platform ⁽⁴⁴⁾ www.salesforce.com) exemplifies how industry players are building in traceability. Veeva and partners will likely emphasize audit logs of AI interactions to meet auditing needs.
- **Data and Privacy:** Life sciences companies must clarify how data flows to AI. For instance, if using ChatGPT or another external model, even with Connectors, they need business associate agreements and must ensure PHI/PII is handled per regulations (HIPAA, GDPR). Some enterprises may prefer on-premise or partner-hosted solutions (as with Veeva's Amazon Bedrock hosting) to avoid sharing data with third-party AI providers.
- **Model Governance:** The fact that Veeva allows customer-chosen LLMs implies a future where pharma companies could deploy internally vetted models (or fine-tuned proprietary models) on Vault. The announcement mentioned Azure AI Foundry as an option for custom models (prtimes.jp), suggesting Microsoft's platform will play a role (especially since Salesforce/OpenAI deals are in play now).
- **Human + AI Workflows:** Firms must invest in change management. As one industry analyst put it, success requires not just tools but a "mindset shift" in how reps sell with AI ⁽⁴⁵⁾ www.performdev.com). Training programs will evolve: reps will need to learn to trust and interpret AI outputs, validate them, and use them ethically. Field management will need new metrics (e.g. AI adoption rates, quality of AI suggestions).
- **Future Capabilities:** Veeva's roadmap and voice interface hints at a more radical future: imagine a rep walking into a doctor's office and saying "Siri, update this call report and show me last year's notes"—that is coming with Veeva's Voice Agent ⁽³⁰⁾ www.veeva.com). Meanwhile, Salesforce's 2025 partnership with OpenAI (announced Oct 2025) means generative AI may appear directly in the Salesforce ecosystem. Veeva (which is distinct from Salesforce) will need to compete. Their "foundation model" approach (using Anthropic/Amazon+customer models) is one path; interest in any future metaplatfrom (e.g. if OpenAI's copilots enter Salesforce, will Veeva integrate or remain separate?) will be watched closely.

Overall, the consensus among experts is that AI copilots will become **routine** in a few years ⁽¹⁾ www.salesforce.com) ⁽³⁾ www.mckinsey.com). The choice between Veeva's built-ins, ODAIA, or building custom is partly about timing and investment. Companies should pilot at least one approach now: whether by enrolling in ODAIA's early adopter program or starting an internal ChatGPT integration POC. Waiting for Veeva's own tools is safe but might leave lost opportunities over the next 1–2 years, as Peersurvey findings show rapid early adoption across industries ⁽¹⁾ www.salesforce.com).

8. Conclusion

The emergence of AI copilots in Veeva-based CRM marks a significant shift for life sciences companies. Veeva's in-house AI Agents promise deep integration and long-term alignment with the Vault platform, but will take time to fully roll out. ODAIA's Engagement Intelligence offers a ready-made, sophisticated solution for sales teams today, leveraging external data and predictive models already tested at large companies ⁽²²⁾ www.prnewswire.com) ⁽²⁾ www.pharmaceuticalcommerce.com). Building your own copilot – though technically feasible and flexible – requires careful planning, security controls, and data science expertise.

Decision-makers should weigh their priorities:

- **If agility is key:** ODAIA or similar partners provide immediate impact with proven ROI. These solutions can jumpstart AI-driven sales efficiency without long development cycles.

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Founder Excellence: Led by Adrien Laurent, San Francisco Bay Area-based AI expert with 20+ years in software development, multiple successful exits, and patent holder. Recognized as one of the top AI experts in the USA.

Custom AI Software Development: Build tailored pharmaceutical AI applications, custom CRMs, chatbots, and ERP systems with advanced analytics and regulatory compliance capabilities.

Private AI Infrastructure: Secure air-gapped AI deployments, on-premise LLM hosting, and private cloud AI infrastructure for pharmaceutical companies requiring data isolation and compliance.

Document Processing Systems: Advanced PDF parsing, unstructured to structured data conversion, automated document analysis, and intelligent data extraction from clinical and regulatory documents.

Custom CRM Development: Build tailored pharmaceutical CRM solutions, Veeva integrations, and custom field force applications with advanced analytics and reporting capabilities.

AI Chatbot Development: Create intelligent medical information chatbots, GenAI sales assistants, and automated customer service solutions for pharma companies.

Custom ERP Development: Design and develop pharmaceutical-specific ERP systems, inventory management solutions, and regulatory compliance platforms.

Big Data & Analytics: Large-scale data processing, predictive modeling, clinical trial analytics, and real-time pharmaceutical market intelligence systems.

Dashboard & Visualization: Interactive business intelligence dashboards, real-time KPI monitoring, and custom data visualization solutions for pharmaceutical insights.

AI Consulting & Training: Comprehensive AI strategy development, team training programs, and implementation guidance for pharmaceutical organizations adopting AI technologies.

Contact founder Adrien Laurent and team at <https://intuitionlabs.ai/contact> for a consultation.

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