

Axtria's CRM Services

CRM should empower the field, but fragmented data and low adoption keep commercial teams from performing at their best.

Introduction

Innovations in life sciences move quickly, but expectations from healthcare providers move faster. Field teams are now expected to deliver timely, personalized interactions across multiple channels while absorbing new evidence, responding to competitive pressure, and making every interaction count. A CRM platform should support this work by serving as the system of record for engagement insights and field execution. Too often, however, it just turns into a place to log activity. It becomes process without intelligence.

Despite substantial investment, CRM systems often fall short. **Fragmented data, inconsistent workflows, and limited embedded intelligence** make them a burden for reps rather than a strategic enabler. The result is **low adoption, incomplete data capture, and missed engagement opportunities**. Today's CRMs also fail to leverage advanced analytics and AI, leaving valuable insights untapped and decisions reactive rather than proactive.

Meanwhile, CRM operations are becoming more complex. Continuous releases, compliance requirements, and intricate integrations strain commercial teams, slowing enhancements and limiting agility.

To succeed, organizations need more than just a CRM platform. They need a **modern, intelligent, integrated, and AI-aware ecosystem** that empowers the field, anticipates customer needs, and activates insights at the point of engagement.



Solution Approach

For the current life sciences commercial model, a CRM alone doesn't cut it. It must be part of a broader ecosystem of data, analytics, and operations. Atria's CRM Services are designed not to replace CRM technology, but to create a connected system that **enables, activates, and transforms** it from a mere "system of record" to a *platform of intelligent engagement*.

Atria's solution approach centers on four core capabilities that together form this modern CRM ecosystem.

1. Deep Life Sciences Domain Expertise

Life sciences commercial models are uniquely complex, shaped by scientific depth, regulatory constraints, stakeholder expectations, and brand-specific nuances. Delivering a CRM that truly empowers the field demands real industry experience: an understanding of how disease states, promotions, patient pathways, and HCP behavior translate into day-to-day rep action.



Understanding Real-World Field Dynamics

- Nuanced knowledge of how reps prepare, plan, and engage across specialty, primary care, rare disease, and critical therapeutic areas like oncology and neuroscience
- Awareness of access constraints, clinical considerations, and patient journey complexities that shape HCP interactions
- Insight into how medical, field reimbursement, and digital channels fit together in omnichannel execution



Disease, Brand, and Portfolio Context

- Tailoring workflows to fit brand maturity, launch strategy, therapy type, and competitive landscape
- Aligning CRM flows with messaging priorities, response triggers, and compliance constraints
- Understanding labeling, evidence needs, and safety requirements that influence what insights or actions can surface



Embedded Compliance-by-Design Thinking

- Knowledge of promotional vs. non-promotional boundaries, sampling rules, consent restrictions, and regional variations
- Designing CRM processes and data capture flows that strengthen governance while enabling agility



Actionable Translation into CRM Enablement

- Mapping domain knowledge into intelligent workflows that mirror real field behavior
- Designing insight surfacing logic that respects scientific context and HCP preferences
- Embedding AI recommendations that are clinically sound, compliant, and aligned to brand strategy
- Ensuring rep experiences remain intuitive, relevant, and grounded in real commercial operations

Domain expertise ensures the ecosystem is not only technically strong but *commercially intelligent*, enabling CRMs to support real-world engagement rather than becoming generic administrative systems.

2. Data and Integration Excellence

A CRM ecosystem is only as strong as the data that feeds it. Most life sciences organizations struggle with fragmented sources, inconsistent quality, delayed availability, and brittle integrations that limit CRM's ability to deliver timely, actionable insights. To unlock intelligent engagement, data must flow seamlessly—accurate, connected, compliant, and ready for activation at the point of action.

Axtria's Data and Integration Excellence provides the foundation for a unified, AI-ready CRM ecosystem:



Unified Commercial Data Layer

- Integrates CRM, sales, marketing, medical, access, digital interaction, claims, and third-party data into a harmonized and governed layer
- Ensures consistency of HCP, account, territory, and roster data across systems
- Supports global and local commercial models with reusable data structures



High-Fidelity, High-Velocity Data Pipelines

- Near-real-time ingestion of field activity, digital signals, content interactions, call notes, and AI-generated insights
- Automated quality checks and governance processes to ensure accuracy, completeness, and compliance
- Scalable modern cloud architectures (Snowflake, Databricks, Veeva Vault, AWS/Azure/GCP)



Interoperability with Key Platforms

- Pre-built accelerators and integration patterns for CRM platforms (Vault CRM, Salesforce LS Cloud)
- Seamless connectivity with marketing automation, content systems, patient support platforms, and incentive compensation
- Event-driven orchestration enabling insights to flow bi-directionally in near real time



AI-Ready Data for Intelligent CRM Activation

- Prepares data structures that support next best engagement (NBE) models, customer 360 profiles, intent scoring, segmentation, targeting, and opportunity identification
- Ensures AI features (predictive models, generative insights, agentic triggers) have context-rich inputs
- Creates the foundation for autonomous or semi-autonomous workflows inside CRM



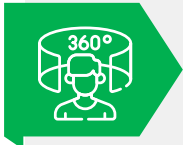
Operational Resilience and Compliance

- Built-in consent management, lineage tracking, auditability, and regional data controls
- Robust monitoring and error handling to ensure uninterrupted CRM operations
- Versioned pipelines that reduce release risk and accelerate enhancement cycles

With a reliable, deeply integrated data backbone, we transform CRM from a static record-keeping system into a dynamic, insight-driven platform for omnichannel engagement.

3. Embedded Insights, AI, and Agentic Enablement

To make CRM a true driver of customer engagement, intelligence must be **embedded, explainable, actionable, and continuously learning**. Axtria solves this by infusing agentic automation directly into the CRM ecosystem, activating insights at the precise moment the field needs them.



Customer 360 and Intelligent Signal Capture

- Detects emerging trends in prescribing behavior, channel preferences, sentiment, and content resonance
- Consolidates clinical, behavioral, digital, and historical engagement data into a dynamic customer profile
- Continuously updates the CRM with new insights as digital and field signals evolve



Next Best Action (NBA) and Next Best Engagement (NBE)

- Recommends personalized actions (call, email, sample allocation, scientific content, peer event invitation) based on predictive analytics
- Prioritizes customers by opportunity, risk, and need
- Provides transparent reason codes so reps understand why an insight matters



Generative and Conversational Intelligence

- AI-assisted call prep: summarizes HCP history, identifies discussion topics, and surfaces relevant content
- AI-driven note drafting: transforms voice/text into structured call notes enriched with sentiment or topic tags
- GPT-style guidance integrated into CRM to support objection handling, content navigation, and on-demand insight retrieval



Agentic Workflows for CRM Automation

- Autonomous system agents that monitor signals, trigger actions, and orchestrate tasks across systems
- Automated territory alerts, roster updates, plan changes, and compliance checks
- Agents that proactively detect data gaps or workflow bottlenecks and resolve or recommend fixes



Omnichannel Intelligence and Closed-Loop Measurement

- Ties CRM actions to marketing interactions, patient behaviors, and access changes
- Measures impact of rep activity on channel performance and customer outcomes
- Continuously adjusts recommendations based on real-world engagement effectiveness
- Reps receive clear "What to do," "Why it matters," and "How to act now" guidance

CRM becomes a continuously learning, AI-enabled engagement hub that empowers reps, improves decision quality, and creates scalable, intelligent interactions across the commercial ecosystem.

4. Scalable Global CRM Operations

A modern CRM ecosystem is never “set and forget.” Frequent platform releases, evolving commercial models, new channels, and changing compliance requirements create constant operational demands. Many organizations struggle to keep up, leading to technical debt, low adoption, and missed opportunities for innovation.

Atria’s scalable global operations ensure your CRM ecosystem remains **reliable, compliant, adaptive, and continuously improving**, enabling commercial teams to focus on customer engagement rather than system maintenance.



End-to-End CRM Administration and Release Management

- Full support for configuration, user management, permissioning, reports, and workflow updates
- Proactive management of Veeva, Vault CRM, Salesforce, and other platform releases
- Regression testing, impact assessments, and readiness communication to reduce adoption friction
- Configuration Management and DevOps enablement using CI/CD framework

Outcome: Stable, compliant, and up-to-date CRM environments



Global Operating Model with Local Flexibility

- 24/7 follow-the-sun operations with global delivery centers
- Standardized processes built on ITIL and Atria accelerators
- Localization of CRM workflows, fields, content rules, and compliance constraints for each country/brand

Outcome: Consistent global governance with market-level personalization



Continuous Enhancement and Innovation Pipeline

- Dedicated enhancement streams that prioritize user feedback, brand needs, and business strategy
- Rapid prototyping and iterative deployment of new capabilities
- Integration of emerging AI/agentive features without disrupting existing operations

Outcome: CRM evolves at the pace of the business, not the pace of IT cycles



Quality Engineering, Testing Automation, and Compliance

- Automated testing frameworks covering functional, performance, and data validation
- Structured controls for GxP, audit trails, sampling, consent, and privacy
- Documentation, traceability, and compliance reporting aligned with regulatory expectations

Outcome: Operational confidence with reduced risk and lower ongoing effort



Data Operations and Integration Stewardship

- Active monitoring and remediation of data pipelines, interfaces, and system linkages
- SLA-driven support for data delays, anomalies, and reconciliation
- Near-real-time data availability to keep AI models, insights, and dashboards current

Outcome: CRM insights stay accurate and ready for activation

We help build a resilient CRM ecosystem that stays aligned to the business, scales across markets, adapts to new commercial realities, and ensures intelligence continues to drive value every day.

Business Impact

According to industry analysts, organizations that implement a modern and interconnected CRM system will find:



Meaningful increases in sales rep adoption of CRM capabilities



Faster operational throughput across releases, enhancements, and integrations



Stronger and more consistent HCP engagement



Lower ongoing cost and effort to operate the CRM ecosystem



Substantially improved data quality and completeness



Overall commercial impact uplift, driven by improved field execution and insight activation

Conclusion

As the life sciences commercial model drives toward personalization and intelligence, traditional CRM implementations are no longer enough. Organizations need a connected ecosystem where data flows seamlessly, insights activate at the point of engagement, and field teams get AI-driven support for every interaction.

Axtria's CRM Services combine deep domain expertise, integrated data foundations, embedded agentic intelligence, and scalable global operations to transform CRM into a strategic growth engine. Our approach helps organizations shift from reactive customer management to proactive, insight-led engagement.

The result is a modern CRM ecosystem that elevates field productivity while improving the customer experience and accelerating commercial impact. With Axtria, companies gain a dynamic platform that continuously learns, adapts, and delivers value.



Axtria helps life sciences companies harness the potential of data science and software to improve patient outcomes by connecting the right therapies to the right patients at the right time. The company is a leading global provider of award-winning cloud software and data analytics to the life sciences industry. We're proud to deliver proven solutions that help pharmaceutical, medical device, and diagnostics companies complete their journey from data to insights to action, enabling them to earn superior returns on their investments. As a participant in the United Nations Global Compact, Axtria is committed to aligning strategies and operations with universal principles on human rights, labor, environment, and anti-corruption, and taking actions that advance societal goals.

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