Bay Bridge Digital

Life Sciences Cloud and the next chapter of customer engagement

Pharma and MedTech perspectives on agentic AI and Dreamforce 2026.



BayBridgeDigital | October 2026

Contents

Executive View

01 Why pharma CRM is changing 4

02 What Life Sciences Cloud is 6

03 A platform with a broader industry scope 7

04 What agentic AI changes in practice 8

05 What changes for commercial and medical teams 13

06 Customer stories 16

07 Make approved content easier to use 19

08 Reliable data and simpler access 21

09 How to prepare the transition 22

10 What leaders should take away 22

11 Sources 23

© Copyright 2025 www. baybridgedigital.com All Right Reserved

For pharmaceutical companies, the quality of a relationship with a healthcare professional depends on what happens between interactions as much as during them.

In a 2025 Salesforce survey, 37% of life sciences leaders described their healthcare professional engagement strategies as broken. Commercial leaders estimated that 30% of their sales and marketing efforts were wasted on the wrong targets or messages. These findings suggest that increasing the volume of contact is not enough. Pharma needs to make each interaction more relevant and ensure that follow-up builds on what came before.

The CRM transition is an opportunity to improve that experience. Leaders should begin with the business problem they want to solve, identify the information and processes involved, and establish how they will measure progress. This white paper explains what Life Sciences Cloud is, why it matters for pharma and how to approach the change.

Dreamforce 2026 brings agentic AI into this discussion: software that can use relevant context to recommend or carry out defined tasks, with an appropriate handover to people.

This paper examines its practical implications for engagement and the CRM transition. Pharma remains the main lens, with MedTech examples showing where needs differ. The broader platform also serves clinical research and patient services; the scope here is primarily commercial and medical engagement....

© Copyright 2025 www. baybridgedigital.com All Right Reserved

The case for change

Why Pharma CRM is changing

The challenge is continuity. If a representative cannot see an appropriate record of previous engagement, preparation starts again from scratch. If a medical question is passed between teams without a clear owner, follow-up becomes harder to track. If marketing uses an outdated profile or preference, the next message may be irrelevant.

These are everyday operational problems that a CRM program needs to address.

37%

Engagement strategies described as broken

Life sciences leaders - Salesforce 2025

30%

Engagement strategies Sales and marketing efforts seen as wasted

Commercial leader's estimate -Salesforce 2025



A healthcare professional may engage with the same pharmaceutical company through a representative, a medical team, an event and a digital communication.

Each interaction has a different purpose. Together, they shape the professional's perception of whether the company understands their needs and respects their time.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Make each interaction build on the last

For a laboratory preparing a product launch, the challenge is especially visible. Territory teams need a consistent understanding of their accounts, medical colleagues need an appropriate route for scientific questions, and marketing needs to know which approved materials are relevant. The same professional may interact with each team for different reasons.

A useful CRM program makes those handovers understandable without erasing the boundaries between their responsibilities.

This changes the questions to ask during a platform evaluation.

- Can a team identify an outstanding request?
- Can it distinguish completed activity from unresolved follow-up?
- Can a representative understand the permitted context without having to reconstruct it from separate systems?

These operational questions provide a stronger basis for evaluating the transition than the number of features in a demonstration.



© Copyright 2026 www. baybridgedigital.com All Right Reserved

Understanding the platform

What is Life Sciences Cloud?

Life Sciences Cloud is Salesforce's platform for engagement in the life sciences industry. This paper focuses on Life Sciences Cloud for Customer Engagement, the part of the platform that supports relationships with healthcare professionals, or HCPs, and healthcare organizations, or HCOs.

Examples of HCOs include hospitals and healthcare groups.

A pharma CRM needs to do more than store a name, an email address and a history of meetings. It needs to reflect professional affiliations, institutional relationships, account responsibilities and the activities surrounding engagement.

Life Sciences Cloud has capabilities for:

- HCP and HCO account management
- Engagement planning and execution
- Key-account management and sample management.

These capabilities matter because pharma work is specific. A representative may need to prepare a visit with the right account context and approved materials. Whereas a key-account manager may need to understand several stakeholders within a hospital group.

Also, a medical team may need to track a scientific inquiry through the appropriate response process. The CRM provides a shared operational foundation, while the organization defines the information, permissions and responsibilities appropriate to each role.

HCP	HCO	Engagement
Professional identity	Affiliation and accounts	Visits, requests, and follow -up

Industry relationships and processes

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Industry scope

A platform with a broader industry scope

Salesforce positions Life Sciences Cloud across pharma, MedTech, consumer health and animal health. Biotechnology firms are also part of the life sciences sector served by the platform. Its scope extends beyond commercial CRM to clinical research, medical affairs and patient services.

Pharma	MedTech	Consumer health	Animal health
Including biotechnology	Medical devices	Consumer-facing project	Veterinary sector

In **clinical research,** Salesforce describes support for site selection and participant enrollment.

For **patient services,** its published examples include access and support processes. These domains involve different users, information and responsibilities from commercial engagement, even where they share a platform.

MedTech adds another useful perspective. An illustrative hospital account may involve clinical users, procurement staff and an operational contact responsible for a device-related request. A sales conversation, product-information request and service follow-up each need a clear owner. This differs from a medicine-focused engagement journey, while preserving the same need for reliable context and coordinated action.

The implementation question is therefore which relationships and processes the organization needs to improve. A pharmaceutical company and a medical device business may share account-management needs but require different activities, content and integrations.

The broader product scope should inform that choice without making every capability part of the initial project.

© Copyright 2026 www. baybridgedigital.com All Right Reserved



Agentic AI

What agentic AI changes in practice

An AI agent can work toward a defined objective by using information and permitted tools. In Salesforce's published Life Sciences approach, agents can draw on CRM and connected data, execute business tasks, and hand complex cases to people.

Life Sciences Cloud supplies the industry context and workflows while Agentforce supports agent capabilities within that environment.

The practical difference is the ability to connect an answer to an action. For example, a generated summary may help a representative understand an account. An agentic workflow could then identify a follow-up that needs attention, prepare a task and assign it through an authorized process. The organization decides which steps require confirmation. This is an illustrative workflow, not a claim that all deployments include these actions by default....

Pharma

An agent could collect missing administrative details, identify the appropriate route and prepare the handover. Scientific assessment and the approval of a medical response would remain with the designated team. The objective would be a complete request reaching the right person with less rework.

Medtech

For a MedTech team, an illustrative starting point could be a routine order-status inquiry. An agent could retrieve the authorized record and provide its status, or create a follow-up for an employee when the information is incomplete. This scenario requires the appropriate integration and permissions. It should not be confused with an agent making a clinical judgment about a device.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Define what the agent can do

Act independently	Request human approval	Hand over
Retrieve authorized account details and route requests within defined rules.	Obtain approval before actions that require validation.	Pass incomplete or out-of-scope requests to an employee.

Illustrative workflow. Scientific review and approval of medical responses remain with qualified teams. Sources and actions must remain traceable.

Measure whether it helps

Right Team → Enough context to respond → Request resolved

Track time saved, corrections and repeated transfers to assess the improvement.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Demonstration

Use Case: From preparing a meeting to completing a request

A Life Sciences Cloud and Agentforce demonstration

Ahead of a scientific congress, a field representative needs to identify relevant healthcare professionals and prepare informed conversations. The information she needs spans specialties, publications and clinical-trial activity.



01 - Prepare a more informed meeting

Bring professional context into the search

The representative asks the agent to identify professionals matching her criteria, then refines the search using scientific publications and recent clinical-trial activity.

98 Profiles → 14 Profiles → 2 Profiles

An increasingly focused shortlist for the user to review

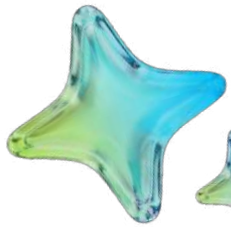
She can then explore a selected professional's profile and assess the information supporting the proposed match....

© Copyright 2026 www. baybridgedigital.com All Right Reserved

02 - Move from a request to a confirmed action…

1–Check the conditions before proceeding

The representative then requests five sample boxes. The workflow checks availability and the quantity permitted in the demonstration. With a configured limit of three boxes, the agent proposes an adjustment and asks her to confirm.

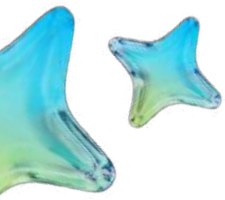


2–After confirmation → Order and logistics coordinated through MuleSoft

Connected services carry the approved request into the relevant operational systems, extending the workflow beyond the CRM interface.

3–Connect preparation and follow-up in one traceable workflow.

The user can find relevant professionals, review the information behind the results and confirm an operational action while retaining control over the next step.



© Copyright 2026 www. baybridgedigital.com All Right Reserved

Every day work

Better-prepared visits and clearer medical follow-up

What Life Sciences Cloud changes for commercial and medical teams

Commercial teams

Start each visit with the right context

Before meeting an HCP, the representative needs to review:

- Account context
- Previous interactions
- Outstanding commitments

Bringing this information together can reduce time spent searching across records and messages.

The objective is a better-informed conversation, followed by a complete interaction record and a clear next step.

Medical teams

Give each scientific inquiry a clear owner

For a Medical Science Liaison (MSL), the priority is to capture the question, identify the appropriate medical colleague and follow the approved response process.

Capture the question → Assign a medical owner → Review and respond

Salesforce describes medical inquiry support and role-based access in its Life Sciences Cloud materials. The organization defines the approved sources, review steps and responsibilities for responding.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Shared context, role-specific access

A common HCP identity supports continuity. Each team's access reflects its responsibilities. For example, a representative may need to know that a medical request is being handled, while access to the scientific exchange remains restricted to authorized medical users.

Evaluate the complete journey

Prepare → Record → Assign follow-up → Confirm completion

Assess whether teams can prepare faster, capture more complete records and complete follow-up reliably.

From recommendations to meaningful follow-up

Connect the right insight with the right team and next step

An HCP expresses interest after an event or raises a scientific question during a visit. The value of that signal depends on what happens next: a relevant recommendation, a clear owner and follow-up that reaches completion.

At Dreamforce 2026, **Salesforce presented Command Center** for Life Sciences as an approach to connecting signals with coordinated action across clinical, medical and commercial teams. Its relevance lies in helping teams turn information into an appropriate next step.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Shared context, role-specific access

A common HCP identity supports continuity. Each team's access reflects its responsibilities. For example, a representative may need to know that a medical request is being handled, while access to the scientific exchange remains restricted to authorized medical users.

Evaluate the complete journey

Prepare → Record → Assign follow-up → Confirm completion

Assess whether teams can prepare faster, capture more complete records and complete follow-up reliably.

01 - Make the recommendation relevant

Give representatives a reason to act

A follow-up suggestion should reflect the HCP's expressed interest, communication preferences and the availability of an approved resource. It should also account for what has already happened: a recommendation loses value if the request has already been answered.

Representatives need to understand the suggestion and be able to dismiss it when their local knowledge makes it unsuitable.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

02 - Give the next step a clear owner

Carry the request through to completion

For a scientific question, an illustrative journey could be:

Capture the request | Assign a medical owner | Track progress | Confirm closure

Industry relationships and processes - (2) (3)

The receiving team needs enough context to respond, with a clear route for missing information or human intervention. A representative may see that the request is being handled while access to the medical exchange remains restricted to authorized users.

03 - Measure adoption and usefulness

Check what happens after the recommendation is viewed

Adoption	Usefulness
Do representatives consult the recommendations?	Do accepted suggestions improve follow-up?
Which suggestions do they accept or dismiss, and why?	Does the request reach the right team and get resolved?

Start with one complete journey. Map the handovers, responsibilities and information needs from the initial signal to resolution, then test the experience with real users.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Customer stories

Takeda

Takeda makes recommendations part of daily work

Salesforce reports that Takeda's next-best-action agent achieved adoption above 90%, with representatives using it an average of two to three times a day. These are customer-specific usage figures reported in the Dreamforce recap; they are not a measured uplift in sales or a benchmark for every Life Sciences Cloud deployment.

For an organization evaluating agentic engagement, the lesson is to examine how a recommendation fits the working day. Frequent use suggests relevance to the users described, but further evidence would be needed to attribute a commercial outcome to the tool. A pilot should therefore evaluate the usefulness of accepted recommendations as well as usage. The cited result concerns Takeda's agent, not a quantified result of migrating its CRM.

2-3x daily

Average representative use

Not a measured sales uplift

90%

Adoption of Takeda's next-best-action agent

Customer-specific usage : Salesforce recap

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Customer stories

AstraZeneca

AstraZeneca helps shape coordinated engagement

80+ markets / Design-partner ambition, not a measured rollout result [7]

Salesforce identifies AstraZeneca as a design partner for Command Center and Agentforce, within its Customer 2030 vision. The Dreamforce recap discusses an ambition to bring intelligence into work across more than 80 markets. This describes direction and collaboration, rather than a measured rollout result across all those markets.

The lesson for another laboratory is to define where coordination breaks down and which teams should shape the solution together. A design partnership is useful evidence of a business problem being addressed. It should be distinguished from a ready-made implementation blueprint or a proven improvement in patient outcomes.

Penumbra

Penumbra connects MedTech commercial operations

In a separate Salesforce customer announcement, Penumbra describes bringing sales, marketing, pricing and customer intelligence together on Life Sciences Cloud. Its account links this approach to more connected commercial and back-office operations and reaching hospitals more efficiently. No quantified improvement is provided in that statement. This is a supporting MedTech example, not a new Dreamforce 2026 announcement.

The example broadens the engagement discussion beyond a representative's visit. Hospital relationships also depend on the information and processes behind the interaction. For a medical device organization, a useful evaluation would follow an account need through the relevant commercial and operational handovers. The published account supports the case for connected operations; it does not establish a specific autonomous-agent result.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Customer stories

FRESENIUS KABI

Fresenius Kabi aligns global engagement

Salesforce's Dreamforce recap describes Fresenius, an early Life Sciences Cloud for Customer Engagement design partner, aligning more than 100 countries and four business units around a common operating model. [7] For an international business, this raises a concrete implementation question: what should be shared globally, and what needs local adaptation? Common account definitions and activity processes can support consistency, while local teams still need to explain their operating requirements. The published scope illustrates organizational alignment; it does not by itself demonstrate that every country has completed the same technical deployment.

4 business units

Organizational scope

Not proof of completed deployment everywhere

100+ countries

Alignment around a common operating model

Salesforce recap

© Copyright 2026 www. baybridgedigital.com All Right Reserved

Trusted data

Better engagement starts with reliable information

Only
46%

of life sciences technical leaders were fully confident that their data was consistently available, timely and accurate, according to research reported by Salesforce in 2025.

For commercial and medical teams, the consequences are practical: an outdated hospital affiliation can misdirect visit preparation, while duplicate profiles can hide previous exchanges. Connecting information around the right healthcare professional is therefore essential to more informed engagement.

01 - Establish a reliable identity

Recognize the same professional across systems

In the demonstration, Informatica MDM reconciles variations in names, specialties and affiliations into a reference profile, retaining the sources and change history. This helps users understand who the professional is and where the information comes from. [12]

02 - Bring useful context together with Data 360

Connect the profile with information that informs the next interaction

Data 360, previously called Data Cloud, connects and harmonizes information from Salesforce and other sources, making it usable across applications and AI agents. Its role extends beyond bringing records together: it helps make relevant context available for a specific task.
In the demonstration, this means connecting the HCP's reference profile with congress participation, scientific publications and clinical-trial activity. A representative can then prepare using a fuller picture of the professional's interests and activities, rather than consulting each source separately [12]

Professional identity	Relevant context
Name - Specialty - Institutional affiliations	Congress participation - Scientific publications - Clinical trial activity

© Copyright 2026 www. baybridgedigital.com All Right Reserved

03 - Use that context in Life Sciences Cloud and Agentforce

Connect information with everyday work

Life Sciences Cloud provides the industry-specific working environment for managing HCP relationships, preparing interactions and coordinating follow-up. Data 360 supplies connected context that can inform those activities. Agentforce can use that context to retrieve information, suggest a next step or execute a configured action within defined permissions.

Data 360

Connect relevant information

Profile, publications, congress activity

Life Sciences Cloud

Support industry workflows

Visit preparation and follow-up

Agentforce

Assist with information & action

Retrieve context, propose or perform permitted tasks

IN PRACTICE

Preparing the next HCP visit

For example, in an illustrative visit-preparation workflow, a representative could ask Agentforce for a briefing. Data 360 would make connected professional context available, while Life Sciences Cloud would provide the account and engagement records. The representative could review the briefing and confirm an appropriate follow-up.

Ask for a briefing → Review the context → Confirm the follow-up

The demonstrated architecture is one possible approach. Its usefulness depends on connected sources, data quality, access permissions and configured actions; it does not establish regulatory compliance by itself.

© Copyright 2026 www. baybridgedigital.com All Right Reserved

User experience

Bring the right context into the working day

At Dreamforce 2026, **Salesforce announced Alforce**, an interface layer intended to make Salesforce data and actions accessible from different work environments while using existing permissions and business rules.

For pharma, the potential can be explained through visit preparation.

An illustrative assistant could help an authorized user retrieve the account context, identify an outstanding commitment and find the relevant resource. But the user would still need a clear way to check the underlying information and decide what to do.

The value would come from reducing the effort required to prepare a useful interaction.

Before adopting such an experience, test the ordinary exceptions. The interface should make these situations understandable. This is why data preparation and user experience should progress together.

A simpler interface can reveal gaps that previously went unnoticed, but it cannot resolve an unclear account owner or an outdated preference by itself.

Establishing responsibility for those issues remains part of the transition.

Prepare my next visit

Accout context	Outstanding request	Next action
Authorized records Sources available to review	Owner and current status. Incomplete information flagged	Check context Confirm when required

© Copyright 2026 www. baybridgedigital.com All Right Reserved

What leaders should take away

Life Sciences Cloud is relevant to pharma because it brings industry relationships and engagement processes into the CRM environment. The opportunity is concrete: help teams prepare better, maintain useful context and complete follow-up with clear ownership.

The transition will be strongest when commercial, medical, operations and technology leaders agree on the problem to solve and the evidence of success. Reliable data, appropriate access and a usable experience are central to that work. Starting with one meaningful process makes the opportunity easier to evaluate and gives the organization a practical foundation for the next phase.

For pharma and MedTech, agentic AI makes this discipline more important: define the task, give the agent reliable context and retain human judgment where it is needed.



© Copyright 2026 www. baybridgedigital.com All Right Reserved

About BayBridgeDigital

BayBridgeDigital is building the Agentic Powerhouse: a new way for companies to operate, make decisions, and grow based in New York with offices across Europe, the Middle East, and Africa.
Our company combines unified data platforms, Salesforce Data Cloud, and ready-to-use AI agents to help the world's largest companies unleash their intelligence, automation, and human creativity at scale.
BayBridgeDigital has been recognized for the fourth consecutive year as one of the fastest-growing private companies in the United States and is listed in the 2024 Inc. 5000 ranking.
For more information, visit: **http://www.baybridgedigital.com**

Contact Marketing:
Roxanne Simpore : rsimpore@baybridgedigital.com
+33(0)6 58 32 34 46

© Copyright 2026 www. baybridgedigital.com All Right Reserved