AI Vendor Pulse

An advisory briefing on AI vendors selling into pharma & biotech

ISSUE 13

THE MEDICAL AFFAIRS ENGINE GOES AGENTIC — AI IN MEDICAL AFFAIRS & SCIENTIFIC INSIGHTS

Sorcero	ZS ZAIDYN	Within3	Semalytix	MediSpend
Medical affairs AI platform	Agentic medical-affairs suite	Medical insights platform	Patient-voice insight AI	Compliance SaaS + HCP engagement

Companies featured in this issue may include current or prospective advisory relationships of Avery & Riley. All data is publicly sourced unless otherwise noted; company-stated claims are labeled as such throughout.

WHY THIS ISSUE EXISTS

Medical affairs is getting its own AI stack — from insight capture to agentic workflows

Medical affairs sits between the science and the market: field medical teams, medical information, congress strategy and the insights that shape evidence plans. Until recently it ran on CRM notes, spreadsheets and point tools. Over the last twelve months the category drew venture capital, agent-first product launches and quiet consolidation. This issue maps five vendors building the AI layer for medical affairs — a function that works around the trial rather than inside it, so it appears at the edges of our lifecycle taxonomy.

WHAT SENIOR LEADERS SHOULD WATCH

01

Agents arrive with a human checkpoint. ZS launched agentic ZAIDYN Medical in May 2026 and Sorcero shipped role-specific AI for each medical affairs function in September 2026 — both stress governance and oversight.[1,2]

02

Capital is following the evidence layer. Sorcero closed a $42.5M Series B in Nov 2025 and Semalytix raised €5.7M in Oct 2025 to scale agentic, patient-voice platforms.[3,4]

03

Consolidation is quiet but real. MediSpend acquired Alucio (Aug 2025) and completed its merger with RLDatix Life Sciences (Jan 2026) — engagement tools are folding into compliance platforms.[5,6]

The Avery & Riley 10-stage clinical-development taxonomy

Coverage bars throughout this issue map each vendor against the ten trial-lifecycle stages below — a **directional, point-in-time read** of where a vendor appears to operate. Each lit stage is colored by **source class** — **teal** where coverage is publicly documented, **gold** where it is company-stated. This week's medical affairs cohort clusters at the strategy edge (P01) and the evidence edge (P10); small footprints reflect the category's position around the trial, not vendor quality.

P01 Portfolio / indication strategy	**P02** Protocol design / feasibility	**P03** Site identification / selection	**P04** Study startup	**P05** Recruitment / enrollment
P06 Study conduct / execution	**P07** Monitoring / oversight	**P08** Data management / cleaning / DBL	**P09** Close-out / TMF / inspection readiness	**P10** Post-trial insights / evidence



Directional reads from public materials & directory review — a snapshot, not vendor-reported metrics.

LIFECYCLE FOOTPRINT SNAPSHOT

Where each vendor plays across the trial lifecycle

VENDOR	P01	P02	P03	P04	P05	P06	P07	P08	P09	P10	FOOTPRINT
Sorcero Medical affairs AI platform	■									■	2/10
ZS · ZAIDYN Medical Agentic medical-affairs intelligence	■									■	2/10
Within3 Medical insights platform	■									■	2/10
Semalytix Patient-voice insight AI										■	1/10
MediSpend Compliance SaaS + HCP engagement											0/10

■ Publicly documented (named customer / third-party) ■ Company-stated positioning ■ Not evidenced

Every lit stage is company-stated; none is independently documented at lifecycle level. The cohort clusters at strategy (P01) and evidence (P10); MediSpend sits adjacent, in compliance. Directional, point-in-time read, not a ranking.

Executive market map

VENDOR	PRIMARY CATEGORY	PROBLEM(S) TARGETED	PUBLIC EVIDENCE SIGNAL
Sorcero	Medical affairs AI platform	Siloed medical evidence and field insights; need for traceable, governed AI.	**Funded challenger.** $42.5M Series B (Nov 2025);[3] Fall 2026 release (Sep 15, 2026).[2]
ZS · ZAIDYN Medical	Agentic medical-affairs intelligence	Fragmented point solutions; measuring medical impact.	**Consultancy-built suite.** Launched May 19, 2026 with three agents (Assist, Augment, Act).[1]
Within3	Medical affairs insights platform	Manual insight moderation, analysis and reporting; launch visibility.	**Established platform.** $100M+ growth round (2020);[7] Launch Intelligence (Sep 2025).[8]
Semalytix	Patient-voice insight AI	Slow generation of real-world patient evidence and insight.	**Funded challenger.** €5.7M led by Holland Capital (Oct 28, 2025).[4]
MediSpend	Compliance SaaS + HCP engagement	Compliant HCP engagement, content and scientific exchange at scale.	**Consolidator.** Alucio acquired Aug 2025;[5] RLDatix Life Sciences merger completed Jan 2026.[6]

Signals summarize public materials as of the profiles that follow; company-stated claims are labeled as such.

Sorcero

LIFECYCLE FOOTPRINT **2**/10

MEDICAL AFFAIRS AI PLATFORM

Targets: *Manual, siloed handling of medical evidence, field insights and congress intelligence — and the need for traceable, governed AI in a regulated function.*

WHAT THEY DO

- **One governed data layer.** Sorcero Medical ingests unstructured medical content — literature, congress material, field and insights data — for medical affairs teams.[2]
- **Function-by-function AI.** The Fall 2026 release (Sep 15, 2026) adds field-medical (a Capture App on iPhone), insights and analytics, and Medical Strategy & Impact solutions, plus Sorcero Wizard, a conversational layer in customer beta from late September (company-stated).[2]

COMPANY & BACKING

- **Independent and venture-backed.** Washington, DC company founded in 2018; we found no acquisition.[3]
- **$42.5M Series B (Nov 2025)** led by NewSpring Growth, with Leawood Venture Capital and Blu Ventures.[3]
- **Customers:** the company says about one-third of top-30 pharma use it (company-stated); no named customers or analyst recognition found.[3]

LIFECYCLE FOOTPRINT — STRATEGY AND EVIDENCE EDGES

P01 · P10

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

$42.5M[3]
Series B, Nov 2025, led by NewSpring Growth

~1/3[3]
of top-30 pharma use Sorcero (company-stated)

Sep 2026[2]
Fall release: purpose-built AI for each medical affairs function

SENIOR-LEADER READOUT

A bet on being the governed system of record for medical evidence and field insight — a fit for one data layer under field medical, insights and strategy. With no named customers public, make reference calls and governance evidence the first diligence ask.

Company-stated claims summarized from public materials; not a buying recommendation.

ZS · ZAIDYN Medical

AGENTIC MEDICAL-AFFAIRS INTELLIGENCE

Targets: *Fragmented point solutions and the difficulty of measuring medical impact across the medical-affairs lifecycle.*

WHAT THEY DO

- **Modular intelligence suite.** ZAIDYN Medical unifies care-gap identification, scientific insights, opinion-leader network intelligence and impact measurement under one governed framework.[1,9]
- **Three agents.** Assist, Augment and Act monitor care gaps, scientific sentiment and engagement signals; ZS says humans review, approve and can override at every step (company-stated). A related module turns MSL notes, advisory boards and congress interactions into structured insight.[1,9,10]

COMPANY & BACKING

- **Consultancy-built product.** ZS (formerly ZS Associates) is a privately held consulting and technology firm founded in 1983, with 13,000+ employees across 35 offices per Wikipedia.[11]
- **Launched May 19, 2026** alongside ZAIDYN Content, as modular suites building on ZAIDYN Commercial.[1]
- **Not found:** funding, named-customer outcomes or analyst recognition for ZAIDYN Medical. Because ZS also advises pharma, scope product and advisory separately.

LIFECYCLE FOOTPRINT — STRATEGY AND EVIDENCE EDGES

P01 · P10

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

3 agents[9]
Assist, Augment and Act, with human approval at each step (company-stated)

13,000+[11]
employees across 35 offices per Wikipedia; founded 1983

May 2026[1]
ZAIDYN Medical and ZAIDYN Content launched

SENIOR-LEADER READOUT

Agentic medical affairs from a firm already in pharma strategy rooms; no quantified outcomes are public.

Ask what the agents do autonomously versus only recommend, and who owns the data model.

Company-stated claims summarized from public materials; not a buying recommendation.

Within3

MEDICAL AFFAIRS INSIGHTS PLATFORM

Targets: *Slow, manual moderation, analysis and reporting of medical insights — and fragmented market data ahead of a product launch.*

WHAT THEY DO

- **Insights management.** A medical-affairs platform for expert engagement, data-source integration and field-team reporting, with AI analysis that pulls trends and sentiment from field interactions.[12,13]
- **Launch Intelligence (Sep 8, 2025).** Powered by "Know Everything" life-science-trained AI, it unifies fragmented data into one real-time market view; the release cites Deloitte research that about a third of launches miss expectations.[8]

COMPANY & BACKING

- **Established, investor-backed.** Raised over $100M in growth funding led by Insight Partners with Silversmith Capital (announced Sep 2020).[7]
- **Built through M&A and partners:** acquired Voxx Analytics; partnered with Array on stakeholder engagement (Mar 2024).[14,15]
- **Customers and visibility:** says all top-20 pharma are customers (company-stated); co-hosted an "AI in Medical Affairs" symposium on Oct 23, 2025. The latest dated signal we found is from Oct 2025.[8,16]

LIFECYCLE FOOTPRINT — STRATEGY AND EVIDENCE EDGES

P01 · P10

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

20 of 20[8]
top-20 pharma say they are customers (company-stated)

up to 90%[17]
insights moderation, analysis and reporting workload eliminated — 2023 claim (company-stated)

>$100M[7]
growth funding led by Insight Partners (announced 2020)

SENIOR-LEADER READOUT

The scaled incumbent, with the deepest customer claim and a launch-intelligence extension.

No 2026 public signals found; ask how its AI roadmap compares with agent-first entrants.

Company-stated claims summarized from public materials; not a buying recommendation.

Semalytix

PATIENT-VOICE INSIGHT AI

Targets: *The slow, manual generation of real-world patient evidence and insight for medical affairs and insights teams.*

WHAT THEY DO

- **Patient voice as evidence.** Semalytix brings patient-generated data into pharma decisions; its Atlas platform is described as letting teams access patient-voice data and build and own custom AI models, with a dedicated medical-affairs offering.[18,19]
- **PatientGPT.** An agentic layer pitched as cutting six months of evidence and insight generation to seconds (company-stated).[20]

COMPANY & BACKING

- **University spin-out, founded 2015** in Bielefeld, Germany; Series A led by btov Partners (2020) with an extension from NRW.BANK Venture Fund (2021).[21,22]
- **€5.7M growth round (Oct 28, 2025)** led by Holland Capital to scale the agentic platform.[4]
- **Customers:** says "several top-20 pharma" clients, none named (company-stated); no analyst recognition or 2026 news found.[4]

LIFECYCLE FOOTPRINT — EVIDENCE EDGE

P01 | P02 | P03 | P04 | P05 | P06 | P07 | P08 | P09 | **P10**

€5.7M[4]
growth round led by Holland Capital, Oct 2025

33M+[4]
medical publications in its AI data base (company-stated)

400,000+[4]
clinical-trial outcomes in its data base (company-stated)

SENIOR-LEADER READOUT

The cohort's most distinctive evidence source: the patient's own words, at scale.

Diligence the provenance and consent posture of the data; ask for a named reference.

Company-stated claims summarized from public materials; not a buying recommendation.

MediSpend

LIFECYCLE FOOTPRINT 0/10

COMPLIANCE SAAS + HCP ENGAGEMENT

Targets: *Compliant, scalable engagement with healthcare professionals — transparency reporting, content and scientific exchange — now being consolidated through M&A.*

WHAT THEY DO

- **Compliance SaaS, widened.** After merging with RLDatix's life-sciences business, MediSpend positions as a global regulatory and compliance SaaS provider for life sciences.[23]
- **Alucio is now inside MediSpend.** The AI-enabled BEACON content-management and HCP-engagement platform was acquired on Aug 4, 2025, adding AI content management and personalized scientific exchange. Price undisclosed.[5]

COMPANY & BACKING

- **Private-equity backed:** Susquehanna Growth Equity made a majority growth investment (terms undisclosed).[24]
- **Serial acquirer:** MedCompli, Real Life Sciences (clinical-trial data anonymization, Jan 2025) and Alucio — three deals in about a year.[5,25,26]
- **RLDatix Life Sciences merger** announced Sep 2025, completed Jan 6, 2026 under the Medispend name; company claims 300+ customers (company-stated).[6,23]

LIFECYCLE FOOTPRINT — ADJACENT TO THE TRIAL LIFECYCLE

NO STAGE LIT

P01	P02	P03	P04	P05	P06	P07	P08	P09	P10

3 deals[5]
acquisitions in about a year: MedCompli, Real Life Sciences, Alucio

Jan 2026[6]
merger with RLDatix Life Sciences completed

300+[23]
pharma, biotech and device customers (company-stated)

SENIOR-LEADER READOUT

The consolidation signal of the issue: an AI engagement tool absorbed into a compliance platform.

No trial-lifecycle stage is lit; engage if HCP engagement governance, not trial execution, is the need.

Company-stated claims summarized from public materials; not a buying recommendation.

Three patterns to carry into your diligence

01

Agents come with a governance pitch

ZS and Sorcero both lead with oversight: ZS says humans review and can override each agent step, while Sorcero stresses a governed data layer (both company-stated). Ask to see the control, not the claim.[1,2]

02

The evidence base is widening

Beyond publications and CRM notes, vendors are drawing on patient voice (Semalytix), launch-market data (Within3) and congress and field insight (Sorcero, ZS) — each with different provenance risks.[2,8,10,18]

03

Capital and consolidation are reshaping the map

Venture rounds at Sorcero and Semalytix sit alongside MediSpend absorbing Alucio and RLDatix Life Sciences. Expect fewer standalone point tools and more platforms.[3,4,5,6]

THE BOTTOM LINE FOR ADOPTION

"Medical affairs is where AI meets the most unstructured, least instrumented evidence in pharma. Leaders who set the governance standard now — provenance, human review, compliance boundaries — will choose among platforms rather than inherit one."

From market read to executive diligence

EXECUTIVE DILIGENCE QUESTIONS

- Which medical affairs workflow most needs leverage first — field insight capture, medical information, congress strategy, or evidence planning?
- What is the provenance of the data behind the insights — literature, field notes, patient-generated content — and who owns the model and outputs afterwards?
- Where is the human checkpoint, and how are AI-generated insights kept inside compliance boundaries for HCP interactions and scientific exchange?
- Can the vendor name reference customers and show evidence of impact, or is the case still company-stated?

SUGGESTED CATEGORIES FOR FUTURE ISSUES

- AI in regulatory affairs & submissions (RIM)
- Real-world evidence & HEOR platforms
- Clinical supply & RTSM
- Site payments & budgeting
- Manufacturing, CMC & supply-chain AI

Source standard. All data is publicly sourced unless otherwise noted. Company-stated claims are labeled as such and summarized from public materials; they are not independently validated performance guarantees.

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