



Everest Group Life Sciences AI and Analytics Services for Commercial PEAK Matrix® Assessment 2025

Focus on ZS

July 2025



Introduction

Over the past few years, life sciences enterprises have significantly overhauled their R&D investments, driven by streamlined development pipelines and a strategic pivot toward novel and large-molecule therapies. This shift has heightened cost containment imperatives and sparked a growing need for an innovative, tech-enabled approach to commercialization. Concurrently, a rising emphasis on patient-centricity and elevated Customer Experience (CX) expectations has further fueled the outsourcing of commercial operations to specialized service providers.

In response, service providers have emerged as critical enablers of this transformation. By harnessing advanced technologies, such as agentic and generative AI, Machine Learning (ML), and advanced analytics, they are helping enterprises enhance workflow efficiency, reduce time-to-market, and drive strategic impact across the commercialization continuum. Their offerings have matured into comprehensive, end-to-end solutions designed to navigate the intricacies of both pre-launch planning and post-launch execution.

In the report, we present an assessment and the detailed profiles of 30 service providers featured on the report

[Life Sciences AI and Analytics Services for Commercial PEAK Matrix® Assessment 2025](#). Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2024, interactions with leading life sciences commercial providers, client reference checks, and an ongoing analysis of the life sciences digital services market.

The full report includes the profiles of the following 30 leading life sciences AI and analytics services for commercial providers featured on this assessment:

- **Leaders:** Accenture, Axtia, Cognizant, Eversana, Indegene, IQVIA, Real Chemistry, Trinity Life Sciences, WNS, and ZS
- **Major Contenders:** Agilisium, Beghou Consulting, Capgemini, Conexus Solutions, C5i, DataZymes, Fractal Analytics, Genpact, HCLTech, Infosys, MathCo, ProcDNA, Quantiphi, TCS, and Tiger Analytics
- **Aspirants:** Avira Digital, Customertimes, Everest Customer Solutions, Infocepts, and Quantzig

Scope of this report

Geography: global

Industry: life sciences (biopharmaceutical, medical devices, and others including Contract Research Organizations (CROs))

Services: life sciences commercial

Life Sciences AI and Analytics Services for Commercial PEAK Matrix® characteristics

Leaders

Accenture, Axtria, Cognizant, Eversana, Indegene, IQVIA, Real Chemistry, Trinity Life Sciences, WNS, and ZS

- Leaders offer a full spectrum of solutions across launch strategy, pricing, access, omnichannel marketing, sales enablement, and patient engagement, supported by robust proprietary platforms
- Leaders have operationalized gen AI and agentic AI across commercial use cases, including next-best-action, marketing mix modelling, and autonomous insight extraction, delivered through copilots and semantic frameworks. This, coupled with deep integration with Salesforce, Veeva, AWS, Microsoft, and Databricks, enables seamless delivery
- Leaders have sustained visibility in the market through frequent publications, conference participation, and client case studies that reinforce domain leadership

Major Contenders

Agilisium, Beghou Consulting, C5i, Capgemini, Conexus Solutions, DataZymes, Fractal Analytics, Genpact, HCLTech, Infosys, MathCo, ProcDNA, Quantiphi, TCS, and Tiger Analytics

- Major Contenders emphasize selected areas, such as field enablement, marketing analytics, content management, or sales forecasting, with deep delivery experience, often supplemented by modular accelerators or proprietary IP
- Many are building gen AI-driven microservices, agent orchestration frameworks, and copilots, typically in pilot or early production stages
- While some have expanded through M&As or ecosystem partnerships, others are expanding into emerging markets such as MedTech or EU/APAC regions, and seeking to transition to a broad commercial solutions partner

Aspirants

Avira Digital, Customertimes, Everest Customer Solutions, Infocepts, and Quantzig

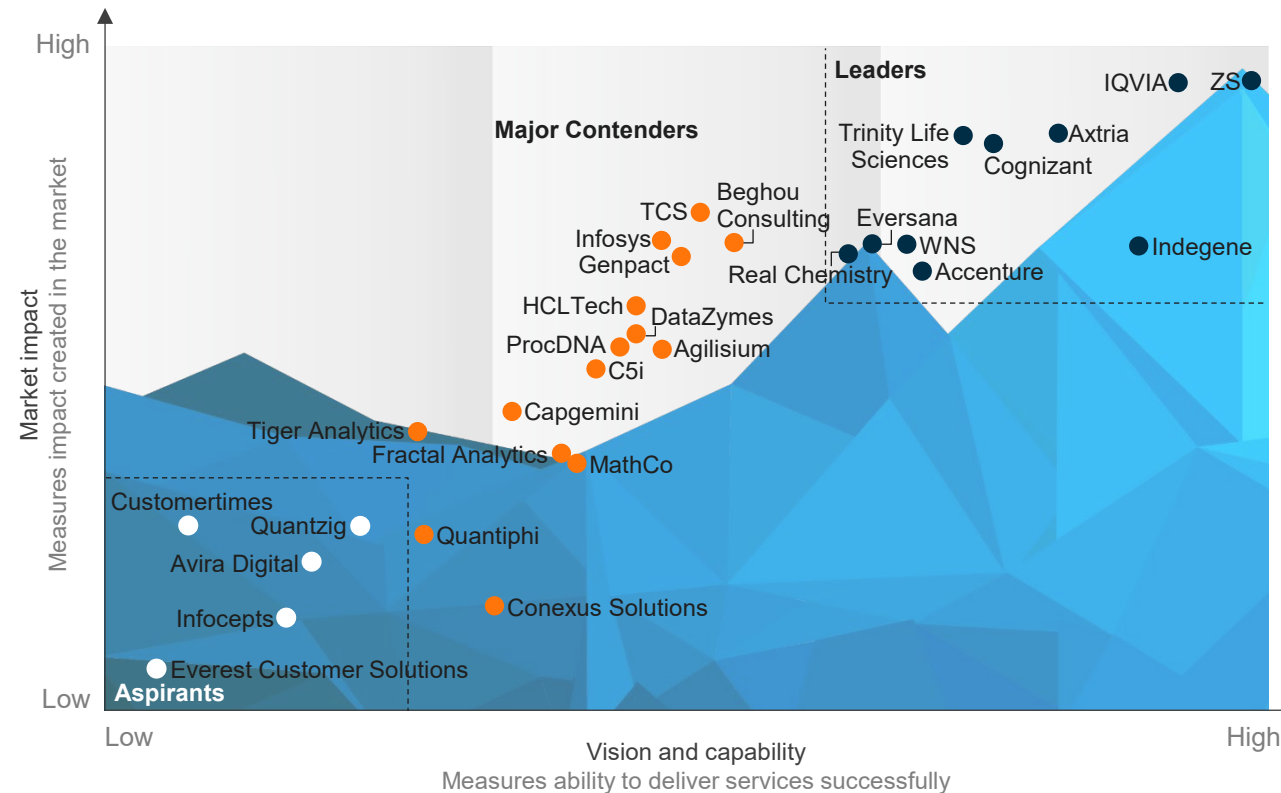
- Aspirants specialize in point solutions such as healthcare professional (HCP) engagement, evidence analytics, or sales operations. Their agile teams, flexible pricing, and personalized service models resonate with small and mid-sized pharma or biotech enterprises
- Gen AI capabilities are generally early-stage and focused on narrow use cases such as summarization, brand research, or sentiment tagging, with limited enterprise-scale deployments
- To scale, Aspirants must build commercial-native IP, expand collaborations with life sciences customer relationship management (CRM) providers, hyperscalers, and niche commercial technology providers, and enhance market visibility through case studies and innovation showcases

Everest Group PEAK Matrix®

Life Sciences AI and Analytics Services for Commercial PEAK Matrix® Assessment 2025 | ZS is positioned as a Leader

Everest Group Life Sciences AI and Analytics Services for Commercial PEAK Matrix® Assessment 2025¹

- Leaders
- Major Contenders
- Aspirants



¹ Assessments for Axtria, Capgemini, Customerimes, Everest Customer Solutions, Eversana, HCLTech, Infocepts, Quantiphi, TCS, and Tiger Analytics exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with enterprise buyers
Source: Everest Group (2025)

ZS profile (page 1 of 4)

Overview

Company overview

ZS is a global consulting and technology firm specializing in healthcare and life sciences. Its commercial analytics and AI practice helps clients optimize brand planning, Salesforce operations, omnichannel engagement, pricing/access, and patient services. ZS brings deep domain expertise, scalable SaaS products such as ZAIDYN®, and strong AI/ML engineering capabilities. It serves all of the top 20 pharma companies and is known for delivering measurable business outcomes across clinical, commercial, medical affairs, and patient-facing functions.

Headquarters: Evanston, Illinois **Website:** www.zs.com

Key leaders

- Pratap Khedkar, Chief Executive Officer
- Maria Whitman, Global Head of Commercialization Strategy and Solutions
- Jess Jarvis, Global AI Lead
- Jaideep Bajaj, Chairman Emeritus and Product Lead – ZAIDYN
- Maria Kliatchko, Principal – ZAIDYN Commercial
- Apoorva Agarwal – Principal, Digital and Technology, GCC Business Lead

Suite of commercial services

- Brand analytics and forecasting
- Omnichannel marketing and engagement optimization
- Field force performance and CRM augmentation
- Market access strategy and payer analytics
- Patient prediction, adherence, and care journey optimization
- Real-world evidence and longitudinal analytics
- Generative AI-powered copilot solutions

Life sciences AI and analytics services for commercial revenue (2024)

Not disclosed

Recent developments

- **2025:** expanded generative AI use cases via agents such as Kural, Kira, and Raven to support market research, content creation, and summarization
- **2024:** enhanced ZAIDYN® with pre-built healthcare agents, extending commercial orchestration capabilities
- **2024:** scaled field force tools across 30,000+ users and 70+ pharma clients globally
- **2023:** delivered measurable impact in omnichannel, content analytics, and Salesforce productivity for a top-10 pharma company

Life sciences AI and analytics services for commercial revenue mix (2024)

By geography ● N/A (0%) ● Low (1-15%) ● Medium (15-40%) ● High (>40%)

Not disclosed

By buyer size ● N/A (0%) ● Low (1-20%) ● Medium (20-40%) ● High (>40%)

Not disclosed

ZS profile (page 2 of 4)

Technology solutions/tools

[NOT EXHAUSTIVE]

Proprietary solutions (representative list)

Solution	Details	Year
ZAIDYN® by ZS	Digital platform with modules for customer engagement, field performance, and commercial analytics; deployed globally including at most of the leading pharma companies	2023-25
PromoLens	AI-powered visual and text content optimization for rep-detailing	2024
Quill	Generative AI-powered content classification tool for campaign metadata tagging	2024
Launch Navigator	Scenario simulation tool for optimizing product launch timelines and rollout strategies	2024
Market Access AnalyTechs	Pricing and reimbursement analytics suite, including IRP modeling and value-based contract simulations	2023-24

ZS profile (page 3 of 4)

Case studies

CASE STUDY 1

Enhancing pharma sales rep training with AI for a top 10 pharma company

Business challenge

A leading pharmaceutical company sought to improve its sales representatives' ability to handle complex customer interactions and objections. Traditional training methods lacked the flexibility and realism needed for effective preparation.

Solution

- ZS developed an AI-powered virtual training simulator that allows sales reps, account managers, and medical liaisons to practice conversations with AI-generated customer profiles
- The platform, powered by a large language model, simulates realistic provider interactions and common objections
- It evaluates reps' conversational skills using brand-specific criteria and provides detailed feedback for improvement

Impact

- The tool was a significant enhancement to existing training programs. It delivered immediate and personalized feedback to improve reps training and performance
- The client plans to integrate the simulator into broader sales training initiatives, aiming to boost field readiness and confidence.
- Provided 99-100% accurate feedback to users across 30 evaluation criteria

CASE STUDY 2

Using deep consumer understanding to grow market share for a diagnostics manufacturer

Business challenge

A leading MedTech company aimed to grow market share in a declining category. It lacked a nuanced understanding of consumer behavior and market drivers, limiting the ability to develop differentiated positioning and commercial strategies.

Solution

- ZS implemented a comprehensive insights program that included a combination of in-depth qualitative research and behavioral data analysis
- The client explored attitudes, behaviors, and product experiences to understand key drivers of decision-making and consumer satisfaction
- It also used behavioral segmentation and journey mapping to develop specific profiles and identify actionable growth strategies










Impact

- Gained 1.4x market share in one year
- Achieved 10% sales lift among top payers
- Delivered a roadmap for improving product perception and brand relevance
- Enabled the client to refocus messaging, optimize targeting, and revamp positioning based on consumer insights

ZS profile (page 4 of 4)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- ZS's proprietary platform, ZAIDYN, delivers cognitive insights, advanced analytics, and next-best action recommendations, equipping enterprises with data-driven guidance across customer engagement and sales execution
- It differentiates itself by anchoring its technology offerings with strategic consulting. It engages in problem definition and cross-functional use case development, providing advisory support that enhances solution customization
- It has built strategic partnerships with both horizontal and vertical players, such as Salesforce and Veeva on the CRM side, and AWS, Adobe, Databricks, and Cloudera for data management, to provide modular and integrated solutions
- ZS has a strong recall among life sciences enterprises seeking commercial services due to its regular publication of commercial strategy content through webinars, thought leadership pieces, and blogs
- It serves a wide range of clients across the commercial maturity spectrum, from mid-market biotech and pharma to large pharma with global presence

Limitations

- Buyers have pointed out ZS as being premium-priced compared to peers. ZS can onboard more clients with inventive customer-centric pricing models, such as risk-sharing or transaction-based models
- ZS has not achieved the same traction in MedTech compared to pharma. Its offerings remain heavily pharma-centric, suggesting room to develop MedTech-specific capabilities, delivery models, and go-to-market strategies
- To better support evolving commercial engagement needs, it could enhance its offerings by enabling HCP-specific digital interfaces and expanding omnichannel capabilities through integrations with social platforms and third-party communication tools

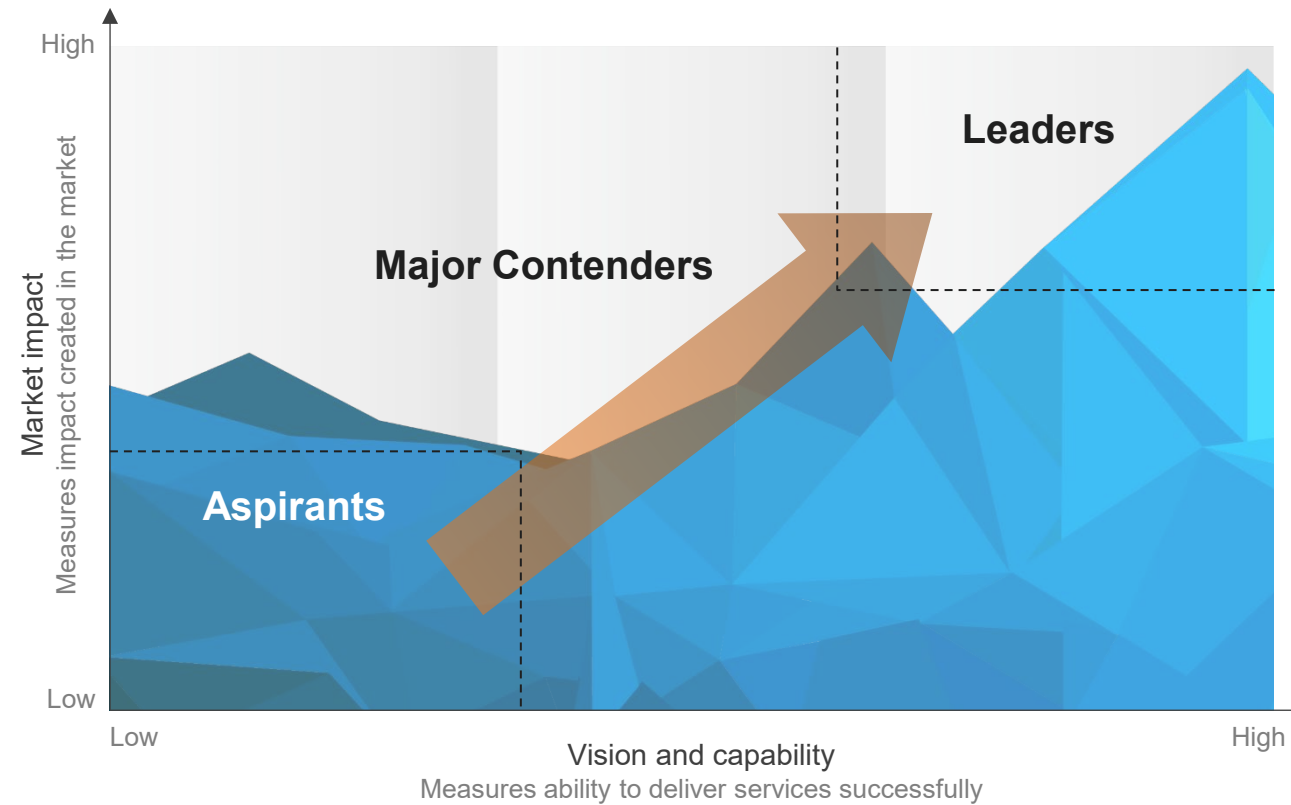
Appendix

PEAK Matrix® framework

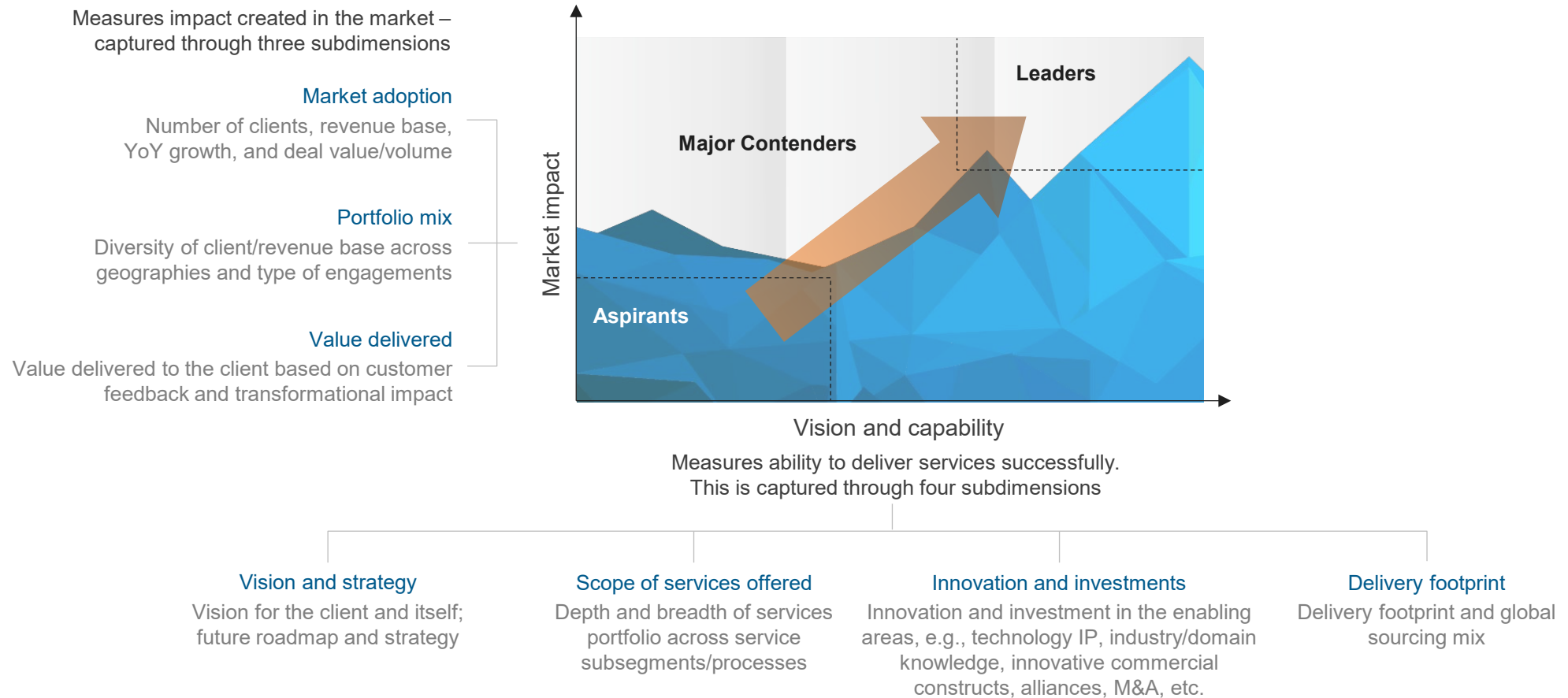
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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