IDC MarketScape: Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services 2025 Vendor Assessment

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THIS EXCERPT FEATURES ZS ASSOCIATES AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services 2025 Vendor Assessment
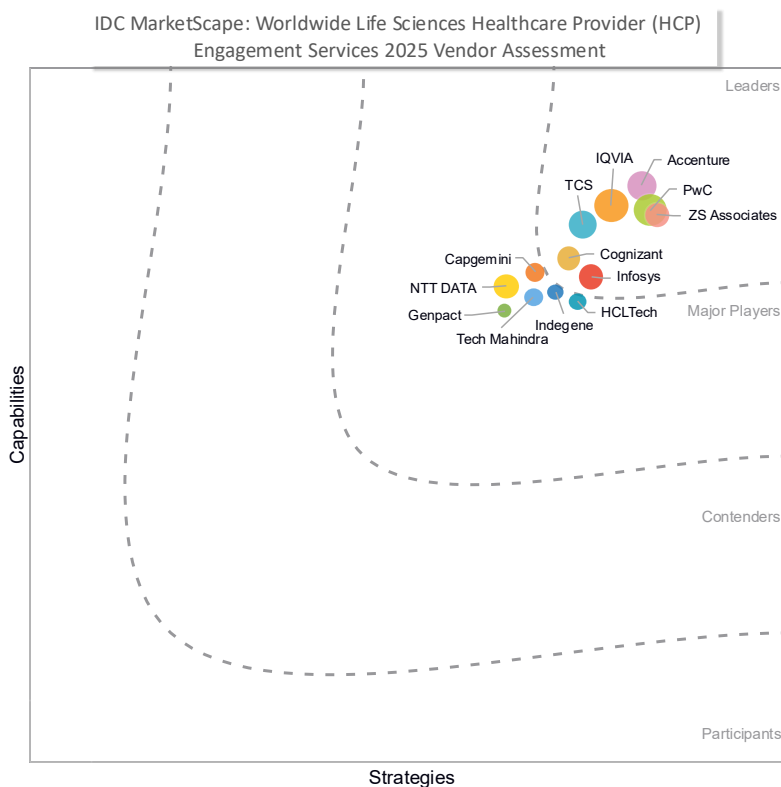

Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC IDC MarketScape: Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services 2025 Vendor Assessment (Doc # US51813524).

IDC OPINION

This IDC MarketScape evaluates global professional services vendors that assist life sciences organizations in planning, assessing, and implementing healthcare provider (HCP) engagement tools and solutions to help them effectively identify, target, and engage with healthcare professionals.

In the face of rapidly evolving market demands, regulatory changes, and heightened customer and patient expectations, life sciences organizations worldwide face mounting pressure to transform how they engage with healthcare professionals to deliver more personalized, impactful, and high-value interactions.

The proliferation of digital engagement channels, sharply accelerated by the COVID-19 pandemic, has fundamentally reset the rules for HCP interactions, ushering in a new era of engagement models and strategies. Furthermore, the shift toward patient-centric, personalized models of care and clinical research calls for a strategic overhaul of traditional HCP engagement approaches to ensure more intelligent, insights-driven, and personalized engagements throughout HCP journeys.

In this context, transforming customer engagement models has emerged as a strategic imperative for life sciences organizations. Worldwide, companies are reimagining tech-enabled HCP engagement strategies to reach healthcare professionals at the right time, through the right channels, with the right messages, and in the right clinical and operational contexts.

As the industry races to transform HCP engagement and customer experience, life sciences organizations are increasingly leveraging tech-enabled solutions. They are tapping into the potential of AI, generative AI (GenAI), agentic AI, and digital twins to incorporate intelligence and personalization into every interaction across virtual and physical settings.

The life sciences industry ranks among the fastest adopters of GenAI, with HCP engagement standing out as the richest vein to mine in this "GenAI gold rush." This is fueling hyper-personalized HCP engagement strategies. IDC's recent research indicates that HCP engagement applications are among the top areas to benefit from the new wave of GenAI-driven transformation. According to IDC survey data, over 75% of life sciences organizations worldwide have either fully implemented Gen AI or are currently implementing it for targeted messaging to HCPs and addressing their queries (IDC's *Vertical AI Use Case Survey 2025*, March 2025).

AI agents are further revolutionizing HCP engagement workflows. According to recent IDC research, more than a third of life sciences executives actively seek guidance from their IT experts on how to leverage agentic AI to improve customer experience through personalized interactions. Approximately 35% of industry organizations are prioritizing the use of AI agents to enhance customer engagement personalization (*IDC MaturityScape Benchmark AI Survey*, February 2025).

As companies aim to embrace precision medicine and become more patient-centric while enhancing productivity, efficiency, and time to value, the ability to personalize HCP interactions at scale by leveraging real-time data and advanced analytics will be a key source of competitive advantage. This will redefine the future of HCP engagement while driving patient outcomes and experiences.

Within this market landscape, life sciences organizations are increasingly demanding services that support their HCP engagement initiatives. This helps them bridge digital competency gaps, navigate regulatory complexities, manage organizational change, and harness innovative technologies (including advanced AI-driven capabilities) to unlock new levels of intelligence, personalization, and value.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape evaluates global professional services vendors that provide IT and business services to support life sciences organizations in the planning, assessment, and implementation of various HCP engagement tools and solutions to help them identify, target, and engage with healthcare providers effectively; reach their HCP engagement objectives; and maximize business value from their technology investments.

IDC has defined the following key inclusion criteria to ensure this IDC MarketScape is a fair assessment of vendors who are active in this market:

- The vendor must have an established global presence in the life sciences market, serving life sciences customers in at least two global regions (Europe, North America, Asia/Pacific, Latin America, and the Middle East and Africa).
- The vendor must offer both IT and business services to life sciences organizations to support them in the planning, assessment, and implementation of various HCP engagement tools and solutions.
- The vendor must have a minimum annual revenue of $300 million. At least 20% of its professional services revenue must be derived from IT services and at least 5% from business services.
- The vendor must have at least 10 years of life sciences services experience and at least 10 active customers for its HCP engagement services.
- The vendor offers a mix of systems implementation and integration, business consulting, and business process outsourcing (BPO) services across a broad range of HCP engagement areas (see Market Definition section).

ADVICE FOR TECHNOLOGY BUYERS

Current market dynamics demand a decisive shift from siloed, reactive customer engagement approaches to intelligent, data-driven, and personalized omni-channel engagement models that ensure precision targeting, deep personalization, and meaningful interactions at every touchpoint while maintaining strict compliance with regulatory standards.

As life sciences organizations rethink their commercial strategies, this transformation will also entail a strategic reconfiguration of how they adapt to emerging health care and payment models, build ecosystem trust, and deliver patient value within the evolving landscape of value-based healthcare.

While the ability to effectively identify, target, and engage with HCPs has become a strategic imperative for life sciences organizations, selecting the right HCP engagement services partner is essential for successfully navigating this transformation. This IDC MarketScape study suggests that the key attributes life sciences organizations should consider when selecting HCP engagement services partners include the following:

- **Integrated, end-to-end services**: The ability to provide integrated services, with a comprehensive mix of capabilities that support HCP engagement initiatives across the entire engagement life cycle, ensuring close alignment between IT and business services for seamless delivery of end-to-end support — from strategic advisory to operational execution and optimization

- **Proven life sciences experience and expertise:** Vendors' expertise across the life sciences value chain, including cross-functional expertise and related capabilities, with a strong understanding of the specific regulatory and operational complexities associated with HCP engagement initiatives

- **Fit for priority use cases:** Demonstrated capabilities and experience in high-priority use cases, backed by a strong track record of successful customer engagements and measurable outcomes to ensure relevance and impact, especially for targeted initiatives with a narrow focus

- **Scalability and speed to value:** The ability to balance global reach with local execution, supporting enterprise-wide implementations, large-scale migrations, and multi-region scalability, as well as local languages and responsiveness to country-specific needs, to reduce complexity, expedite deployments, and accelerate time to value

- **Nuanced regulatory expertise:** Deep understanding of industry standards and nuanced regulatory requirements in target regions, market subsegments, and relevant therapeutic areas and medical specialties, enabling effective delivery on project objectives while minimizing compliance risks

- **Data management, privacy, and security:** Robust data management and governance capabilities, with deep expertise in advanced data security and

privacy-preserving technologies to ensure the secure, compliant, and responsible utilization of multi-sourced data (including data from internal and external sources and real-world data) across all HCP engagement initiatives

▪ **Innovation enablement:** The vendor's expertise in AI-driven technologies, including GenAI and agentic AI, along with a proactive approach to delivering innovation, anticipating customer needs, supporting early strategic planning, identifying high-impact opportunities, and co-innovating to enable HCP engagement innovation and maximize business value

▪ **Ecosystem partnerships:** The depth and breadth of alliances across the HCP engagement technology ecosystem and beyond, including partnerships with specialized tech suppliers, industry players, healthcare organizations, payers, and regulators. These alliances enable vendors to fully meet life sciences organizations' HCP engagement objectives, ensure compliance, expedite time to value, and adapt to emerging trends in the converging landscape of healthcare and life sciences.

▪ **Customer focus and outcome-oriented strategies:** Vendors are expected to offer flexible delivery models that adapt to diverse organizational needs and constraints. They should utilize structured, outcomes-focused agile methodologies and leverage strong client collaboration and continuous stakeholder feedback to ensure business alignment, effective change management, and sustainable long-term value from technology investments.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

ZS Associates

After a thorough evaluation of its offerings and capabilities, IDC has positioned ZS Associates (ZS) in the Leaders category in this 2025 IDC MarketScape for Worldwide Life Sciences Healthcare Provider (HCP) Engagement Services.

Founded in 1983 and headquartered in Evanston, Illinois, ZS employs over 13,000 people, serving clients across 38 delivery centers in over 70 countries. The company has been serving the life sciences industry for over 40 years. At present, a significant portion of its HCP engagement services customers are based in the US and Europe, with a growing footprint in the rest of the world.

ZS offers end-to-end capabilities and services to assist life sciences organizations in planning, assessing, and implementing HCP engagement tools and solutions. Its range of HCP engagement services assessed within the scope of this study include

strategy and transformation consulting, systems implementation and integration, and BPO.

ZS's extensive industry expertise and experience enables it to deliver comprehensive services across the full spectrum of HCP engagement areas and related data-driven services (CRM, events management, omni-channel engagement, field planning, patient journey, market access strategy, content and digital asset management, next best action recommendations, AI-enabled HCP targeting, events analytics, marketing analytics, compliance management, customer reference data management, patient and prescriber data management, and KOL data management).

ZS has demonstrated impactful outcomes in multiple engagements, supporting life sciences customers with AI-driven services and solutions in areas such as CRM implementations, dynamic HCP targeting, omni-channel orchestration, field force enablement, pre-call planning, next-best-action insights, and content hyper-personalization. This has driven significant improvements in HCP engagement rates, sales effectiveness and productivity, cost savings, customer satisfaction, patient access, time to market, and revenue growth. For example, ZS supported a major global pharma company in deploying a predictive solution for dynamic HCP targeting and content hyper-personalization, achieving field adoption of over 90% and significant improvements in HCP engagement rates and time savings for sales teams.

ZS partners with a broad range of application vendors in the HCP engagement space. This includes strategic partnerships with Veeva, Salesforce, and Adobe, with robust experience in Veeva and Salesforce platform implementations. The company also leverages partnerships with key global tech players (e.g., AWS, Google, and Microsoft) and a broad array of specialized data and analytics and industry-specific solution vendors, alongside its centers of expertise and sustained investments in digital innovation, to drive innovation and enhance its HCP engagement offerings.

Strengths

ZS Associates integrates extensive industry expertise and HCP engagement services experience with robust data science and AI capabilities to comprehensively support life sciences organizations' HCP engagement initiatives. ZS has been recognized for:

- **Extensive industry expertise and cross-functional approach:** ZS offers extensive life sciences expertise, built on decades of experience, and a cross-functional engagement approach to comprehensively address life sciences organizations' HCP engagement needs. Through its dedicated team of 10,000 life sciences-focused professionals (as well as data scientists, cross-functional teams, and dedicated centers of excellence), ZS supports complex scenarios in highly regulated environments across the full HCP engagement life cycle.

- **Integrating intelligent AI-driven capabilities and assets:** ZS offers robust data science and AI capabilities to support the rapid deployment of AI/ML,

generative AI, and AI agents to address customers' HCP engagement needs. It emphasizes embedding analytics into CRM workflows and offers a variety of proprietary GenAI tools and solutions (e.g., MAX.AI, Personalize.AI, and Kural) to drive HCP engagement innovation and personalization while promoting patient-centricity. Its AI-enabled, cloud-based life sciences ZAIDYN platform uses AI and GenAI to bring together data and insights to support commercial processes, including field planning, dynamic HCP targeting, and HCP and patient engagement and personalization.

- **Outcomes-driven approach and flexible engagement models:** ZS's modular, value-driven service delivery model emphasizes cost efficiency, operational excellence, and measurable business outcomes. ZS has been recognized for its decision-driven methodology and strong focus on outcomes that help maximize business outcomes and sustainable impact. The company's customer-centric approach is also reflected in its flexible customer engagement and pricing models, including value-based and risk-sharing arrangements.

Challenges

While ZS excels in delivering comprehensive HCP engagement services to life sciences customers, it has an opportunity to expand its global market footprint by further refining its offerings and market messaging to align with the specialized, evolving needs of medium-sized and emerging life sciences organizations. The company would also benefit from enhancing its BPO capabilities and adopting a more structured approach to organizational change management.

Consider ZS Associates When

Life sciences organizations should consider ZS when seeking an end-to-end partner with deep experience and regulatory expertise across the HCP engagement life cycle for their comprehensive HCP engagement transformation initiatives. It is an ideal fit for life sciences organizations that require CRM transformation by integrating intelligent, AI-driven capabilities into orchestrated workflows and deploying GenAI-enabled solutions for diverse omni-channel engagement use cases, including field force enablement, next best action recommendations, HCP targeting, and HCP engagement personalization across diverse product lines and therapeutic areas. ZS is also a compelling choice for organizations requiring support in strategies, decisions, and transitions associated with the unfolding Veeva/Salesforce market landscape.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned it is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. In this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capabilities.

Market Definition

For the purposes of this study, healthcare provider (HCP) engagement services are defined as a combination of IT and business services that assist life sciences organizations in planning, assessing, and implementing various HCP engagement tools and solutions to help them effectively identify, target, and engage with HCPs and maximize business value from their technology investments.

As defined in this study, HCP engagement services include strategy and transformation consulting, systems implementation and integration, and business process outsourcing (BPO) services.

- **Systems implementation and integration:** For the purposes of this study, systems implementation and integration is defined as a process that includes the planning, design, implementation, and project management of technical solutions to address life sciences organizations' HCP engagement needs. These projects may involve the implementation and integration of different HCP engagement applications from various vendors. If they involve

contracting for custom application development related to systems implementation and integration, these activities are included in the scope of this assessment.

- **Strategy and transformation consulting:** In the context of this study, strategy and transformation consulting refers to business consulting services that involve strategic consulting, operational improvement, and organizational change consulting services to help life sciences organizations define the strategy and design and implement the structures and processes that help them reach their HCP engagement goals and realize strategic business value from their HCP engagement investments and activities.

- **Business process outsourcing (BPO):** IDC defines business process outsourcing as the transfer of management and execution of one or more complete business activity, business process, or entire business to a BPO vendor. For the purposes of this study, BPO contracts with life sciences companies can include the transfer of management and execution of the entire HCP engagement function or discrete segments thereof.

These services are delivered to life sciences organizations — which include pharmaceutical, biotech, and medical device organizations — to support a broad range of HCP engagement areas and related data-driven services, including (but not limited to) customer relationship management (CRM), field planning, omni-channel digital engagement, customer segmentation and targeting, AI-assisted suggestion generation, medical affairs communications, events management, marketing analytics, content and digital asset management, patient and prescriber data management, customer reference data management, and KOL data management.

LEARN MORE

Related Research

- *IDC FutureScape: Worldwide Life Sciences Industry 2026 Predictions* (forthcoming)
- *The Technology Impact of the New Trump Administration, 2025: Life Sciences, Medtech Companies, Healthcare Providers, and Healthcare Payers* (IDC #US53552525, June 2025)
- *Generative AI Use Case Taxonomy, 2025: The Life Sciences Industry* (IDC #US52220325, May 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Life Sciences Organization Worldwide, 2025* (IDC #US53345625, May 2025)
- *Worldwide GenAI Industry Use Case Early Adoption Trends, 2025: Life Sciences* (IDC #US53317424, April 2025)
- *How Are Life Sciences Organizations Leveraging GenAI for Regulatory Submissions?* (IDC #EUR253211425, February 2025)

- *How Are Life Sciences Organizations Using GenAI for Outcomes-Based Drug Pricing?* (IDC #US52957824, January 2025)

Synopsis

This IDC MarketScape evaluates vendors of worldwide life sciences healthcare provider (HCP) engagement services. These global vendors offer life sciences organizations a mix of business and IT services to support them in the planning, assessment, and implementation of various HCP engagement tools and solutions. This assessment is based on the essential criteria life sciences organizations must consider when selecting partners for their HCP engagement initiatives to maximize the business value of their technology investments.

"As the industry accelerates the shift toward precision medicine and patient-centricity, the ability to effectively identify, target, and engage with healthcare professionals has become a strategic imperative for life sciences organizations. In this race, mastering intelligent, AI-enabled, insight-driven HCP engagement strategies is emerging as a critical success factor in unlocking precision, personalization, and value in provider interactions." — Research Manager Nino Giguashvili, IDC Health Insights Life Sciences Commercial Strategies

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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