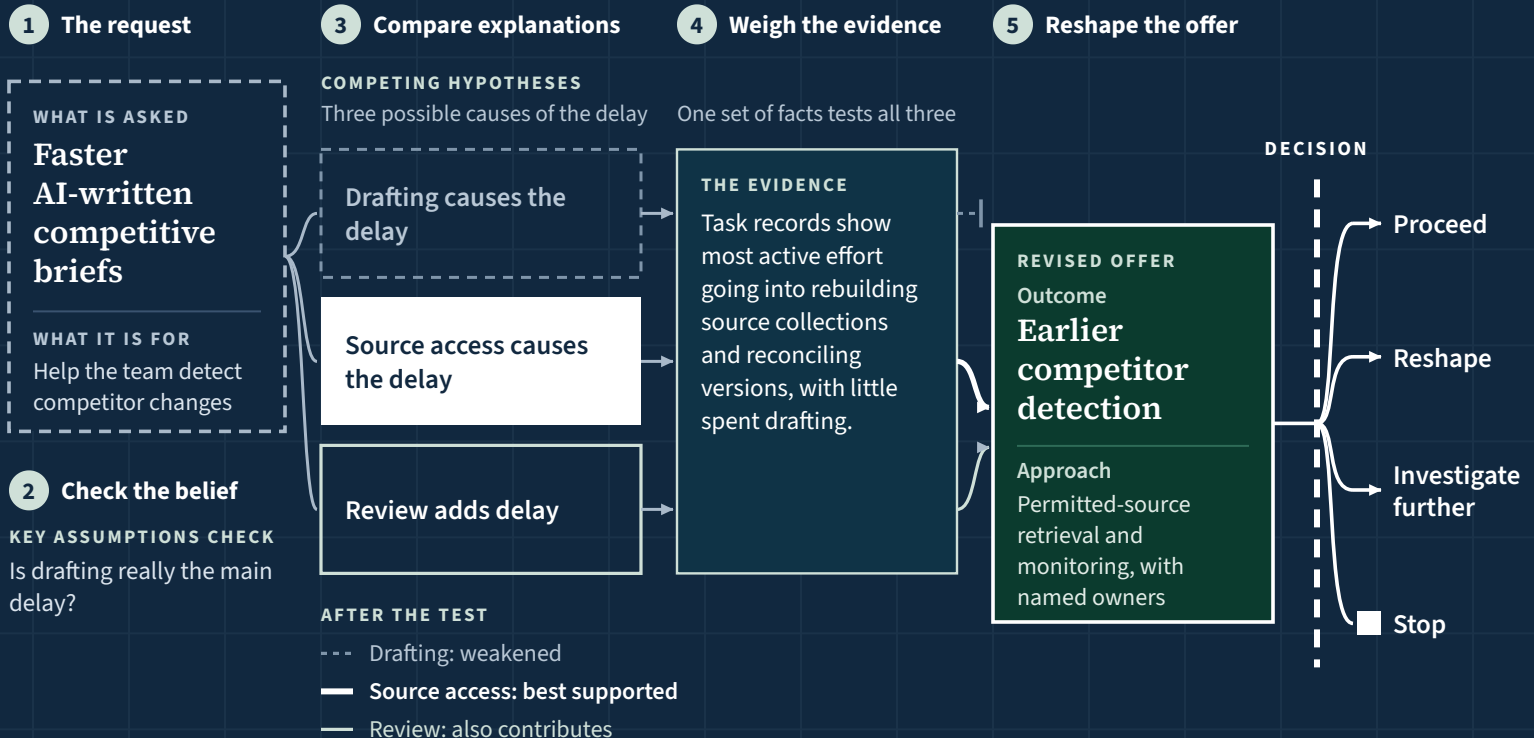


Deal Formation: From Interest to a Pilot Decision

Structured analytic techniques from intelligence analysis, applied to forming enterprise AI partnerships in Pharma.

Where to use each one, and why.

WORKED EXAMPLE Intelligence-analysis techniques test a request against the evidence before an offer is shaped.



Eight analytical techniques

A clearer basis for the next partnership decision

October 2026 | Revised 27 October 2026

EXECUTIVE PERSPECTIVE

Decide what the pilot must answer

Before committing to an AI pilot, buyer and partner need a shared view of the problem, the evidence and the decision that will follow.

External partners play a substantial role in pharmaceutical commercial AI. In IQVIA's May 2025 survey of 107 senior commercial leaders, 89% said their organizations already co-develop AI with vendors or are considering it. [2] In a separate 2026 ZS survey of 223 pharmaceutical and biotechnology technology executives, 60% cited data and technology infrastructure readiness and 59% cited regulatory and compliance uncertainty as barriers to scaling AI. [13]

These surveys ask different questions, and neither explains why a particular partnership stalls. They do suggest what to investigate: does this workflow need AI; may the partner use the required data; who will manage the service; and what would justify spending more? The answers can change the scope, price or choice of partner.

This report applies structured analytic techniques, or SATs, to those questions. Intelligence analysts use them when information is incomplete and a wrong judgment is costly, because experienced analysts tend to see what they expect to see. SATs counter that habit: they state assumptions, test rival explanations against the same evidence and name

the signs that would change the view. [1] Deal formation works under the same conditions.

Agree why this partnership makes sense

The partnership rationale is the shared explanation of why this buyer should act now. It states the business problem, how the proposed service would help, what the buyer could do instead, each party's responsibilities and the next decision. As new evidence arrives, both sides should update that explanation together.

Test the reasoning before making the commitment

Start by checking the assumptions the proposal depends on. Once the offer is specific enough to examine, ask why a responsible buyer might reject or change it. Run that challenge before approving a pilot, while the scope and responsibilities can still change.

The result should be a clear next step: investigate an unanswered question, reshape the offer, authorize a pilot with defined limits, or stop. The chapters explain which technique helps with each choice.

Each stage asks for a different commitment, and different evidence.

Investigate Confirm the business problem and the question worth answering.	Shape Agree a scope, responsibilities and offer that the evidence supports.	Evaluate Run a limited pilot with permissions, success criteria and a named next decision.	Commit Obtain the funding, permissions and operating acceptance needed for what follows.
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GATE 2: PILOT AUTHORIZATION

Published findings: [1, 2, 13]. Stage model and application: Enterprise AI Deal Intelligence. The pilot decision is the move from Shape to Evaluate.

THE ARGUMENT IN BRIEF

Five conclusions for partnership leaders

A promising conversation becomes a credible partnership when both sides can explain what they are trying to achieve, what remains uncertain and who decides next.

- 1

Identify the outcome you are trying to prevent.

A buyer who makes no decision faces a different problem from a team that cannot scale a pilot or persuade users to adopt it. Choosing an existing platform is another distinct outcome. Keep these outcomes separate when interpreting research or deciding what to do. [Pages 4 to 7.](#)
- 2

Check what the proposal depends on.

An AI writer may look attractive because everyone assumes drafting is slow. A Key Assumptions Check asks whether that is true and whether a different finding would change the offer. [Pages 17 to 19.](#)
- 3

Include data rights and review responsibilities in the proposed service.

Licensed sources, promotional review and safety reporting can change what the partner may deliver and what it costs. Identify these conditions while shaping the offer. [Pages 7, 18 and 27 to 30.](#)
- 4

Confirm each person's authority.

A sponsor can support the idea without controlling the budget, data permissions or workflow. Identify who holds each decision on both sides. [Page 8.](#)
- 5

Agree what happens after the pilot.

State the next business decision, who will make it and what evidence they need. A successful technical test alone does not authorize production. [Pages 39 to 42.](#)

Pharmaceutical sponsors	AI partners	Both, together
Use the decision-owner map (who holds each approval, p.8), the premortem (imagining the pilot has failed, p.31) and the pilot charter (the agreement on the test, p.40) to decide what a partner must show before you commit resources.	Use Outside-In (starting from the buyer's market, p.14), Competing Hypotheses (testing rival explanations, pp.23 to 25) and the red team (why a buyer might decline, p.27) to shape an offer the buyer can own and approve.	Use the technique finder (which technique fits which question, p.12) and the indicator record (events that change the next decision, p.37) to keep a shared view of what has changed and who decides next.

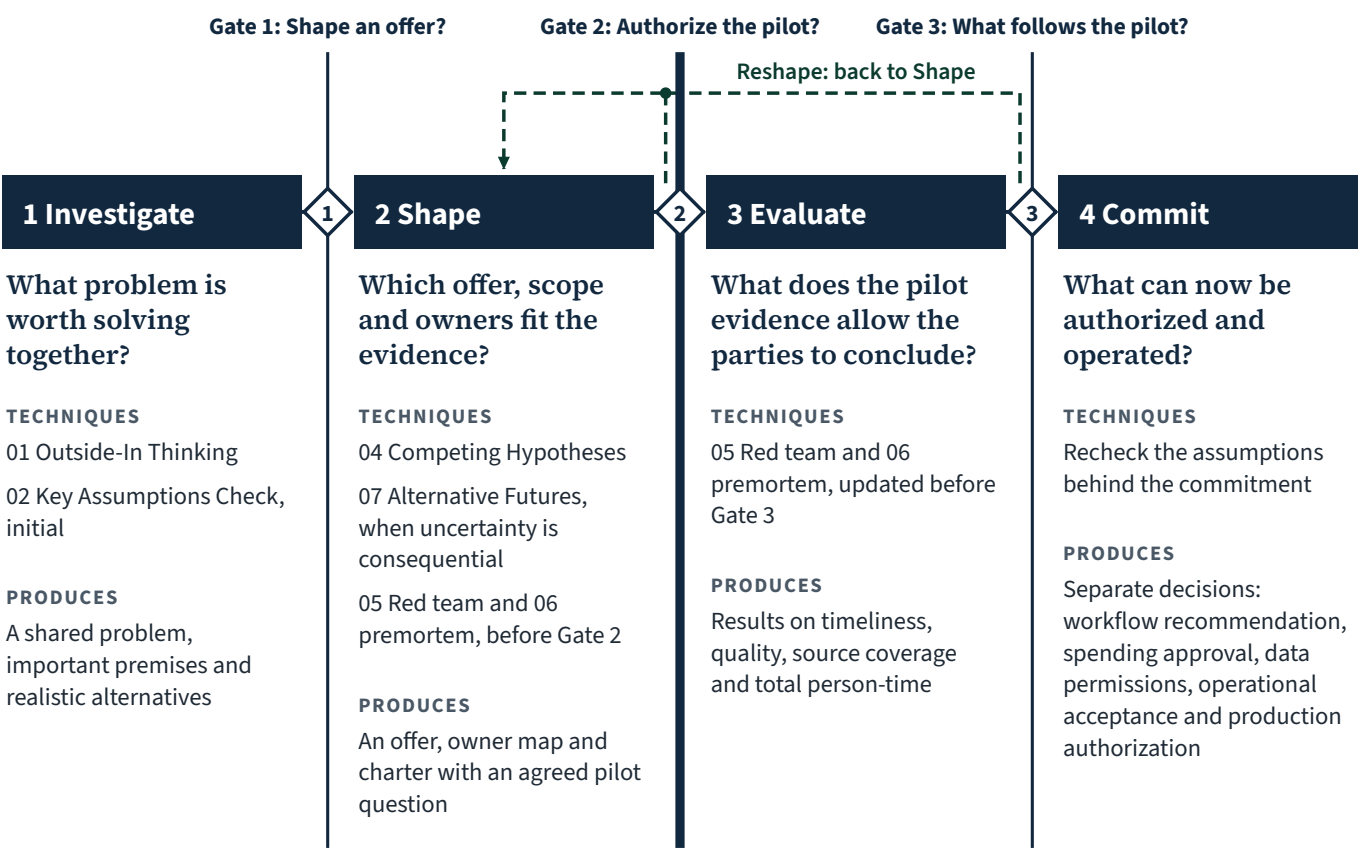
HOW TO READ THE EVIDENCE

Numbered citations identify published findings and methods. The choice of technique, sequence, commercial examples and recommended responses are the author's applications. Source notes distinguish these applications from the published foundations.

THE FORMATION WORKFLOW

How the partnership moves toward a decision

Four stages and three gates organize the work. Gate 2 authorizes the pilot; Gate 3 decides what happens after it.



RESPONSE	Where it leads at Gate 1	Where it leads at Gate 2	Where it leads at Gate 3
→ Proceed	Move to 2 Shape	Start 3 Evaluate within the agreed limits	Move to 4 Commit
↩ Reshape	Reframe the problem in 1 Investigate (no offer yet)	Return to 2 Shape to change the offer, scope or responsibilities	
↩ Investigate further	Return to 1 Investigate to resolve the question blocking the decision		
■ Stop	Available at every gate: end the effort and record the reason		

THROUGHOUT		
02 Key Assumptions Check	03 Quality of Information Check	08 Indicators and Signposts

Numbers refer to the techniques in the finder (p.12), not a required sequence. Gate details follow on the next page.

Technique foundations: [1]; premortem: [9]. Stages, gates, owners and return paths: Enterprise AI Deal Intelligence.

01 02 03 **04** 05 06 07 08

04 Competing Hypotheses

STAGE Shape

Understand the cause before choosing the solution

Use Competing Hypotheses when several explanations could fit the same problem or buyer behavior, but the team is acting on only one.

RUNNING EXAMPLE The sponsor asks for faster competitive briefs. The provider hears a need for an AI writer, but the delay could come from collecting sources, composing the brief or waiting for review. Until buyer and provider know which explanation fits the work, they cannot tell which change would help.

Analysis of Competing Hypotheses compares explanations against the same evidence. [1] The team asks what it would expect to observe if each explanation were right, and what would weaken it. A fact that fits every explanation does little to tell them apart.

Look for evidence that tells explanations apart

If analysts spend most of their time finding sources, faster writing may leave the main burden untouched. If finished briefs wait in approval queues, the team should examine review responsibilities. If analysts struggle to reconcile conflicting claims, links to the original evidence may matter more than draft generation.

For each explanation, ask what evidence would count against it. Several causes may contribute: poor

source access and slow review can occur together. Start with a short comparison; use a fuller evidence matrix when the complexity and consequences warrant that effort.

Separate the cause from the response

Slow source access explains a problem. Buying retrieval, improving existing search or deferring investment are possible responses. Establish the cause first, then compare those responses against the buyer's objectives, available tools and constraints.

Use the same reasoning when a buyer goes quiet

A buyer's silence can also fit several explanations. The comparison on page 25 shows why a priority change, an approval queue and unconfirmed funding call for different evidence and next steps.

The analysis should change the team's next move. Rather than arrange another demonstration, it may need a data owner's confirmation, a review-process discussion, a narrower offer or a test of an existing tool.



RUNNING EXAMPLE

Task records show most active effort going into rebuilding source collections and reconciling versions, with little spent drafting. Source access best explains the burden, with review also contributing (p.24). Buyer and provider therefore shift the offer toward retrieval from permitted sources.