Poster # 31

Ask, and Ye Shall Analyze: **Data Insight Agentic Assistant**

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About Me

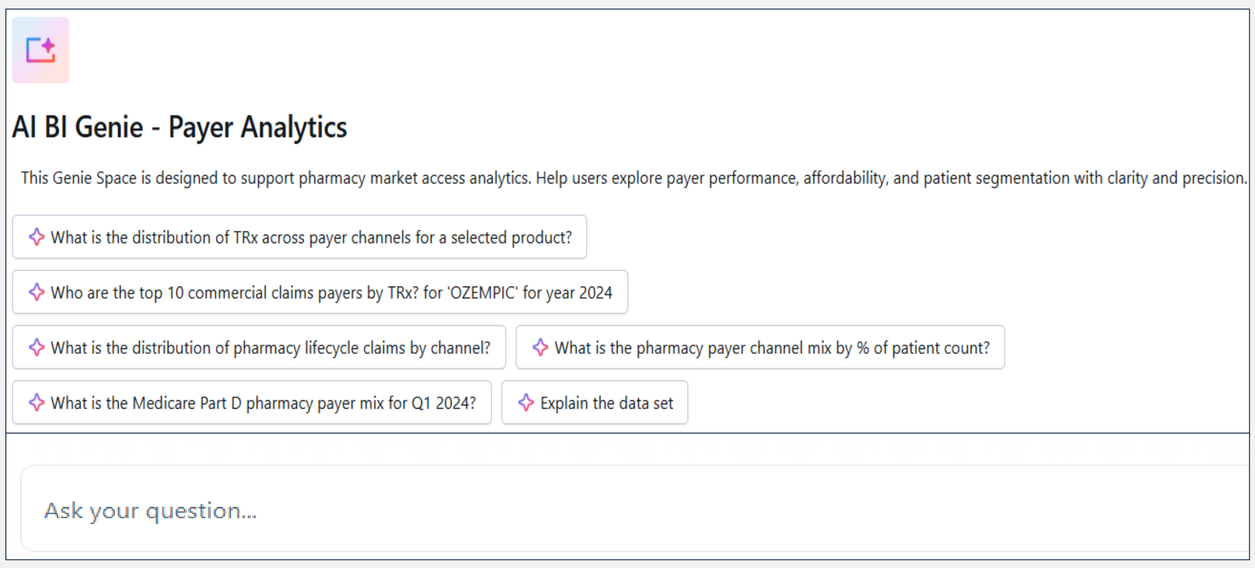
Hi, I'm Onkar! I'm pursuing **Master's in Business Analytics at UCLA Anderson**, building on **3+ years at ZS Associates** where I worked with pharma leaders, including Merck - on go-to-market strategy, pipeline and Launch Strategy, Due-diligences and Valuations for early pipeline assets, Forecasting, Claims Analytics, and 340B revenue leakage. My work helped drive investment decisions and expand patient access.

At UCLA, I serve as VP of Career Services. I'm passionate about using data to drive impact in healthcare. Outside of work, I stay grounded through the gym, runs, films, and reading. I thrive where analytics meets purpose and I'm excited to bring that mindset to Merck.

Project Overview

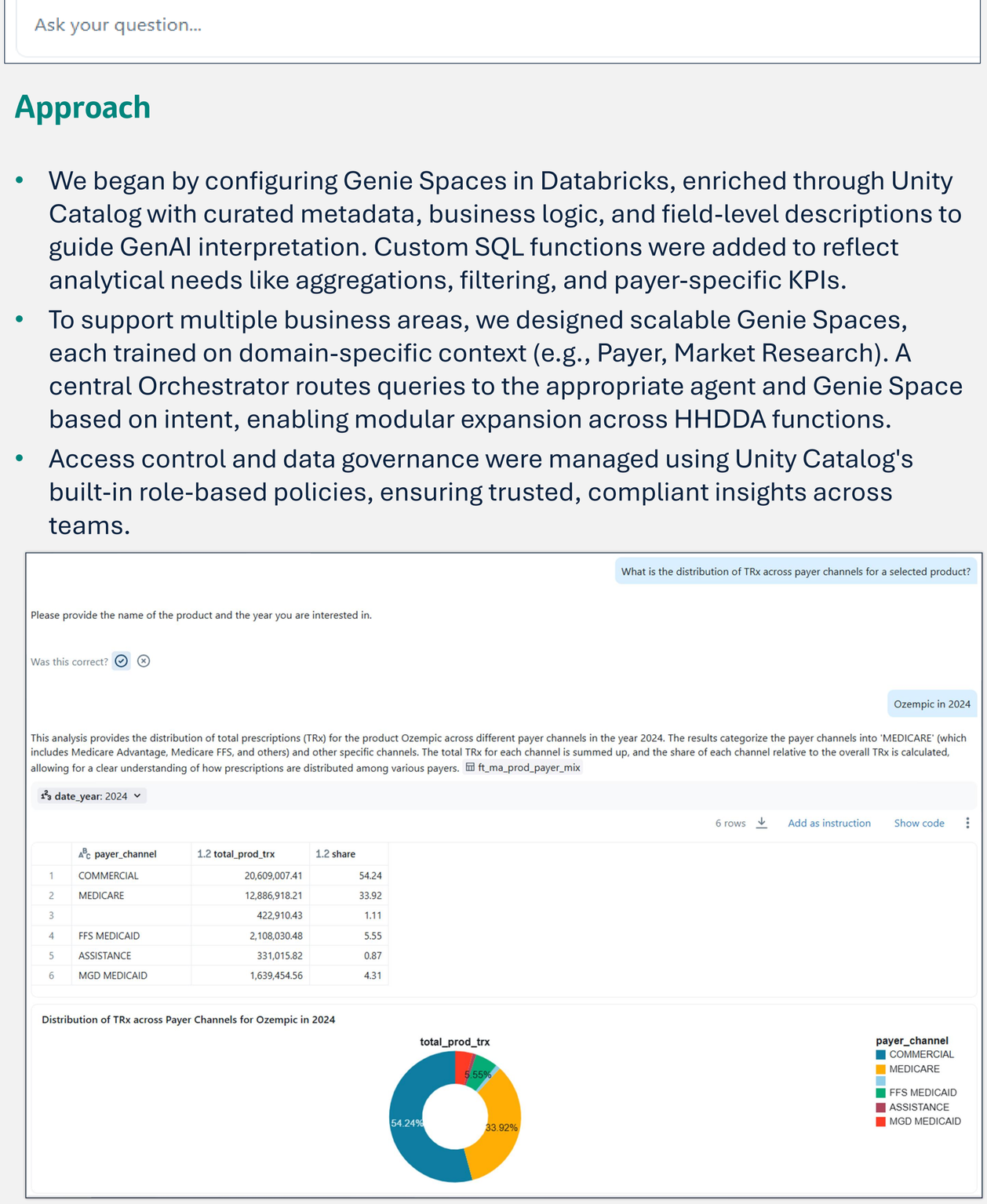
We've built a Databricks-native GenAI assistant that turns plain-English questions, across payer, customer, digital, sales, or any future domain, into governed SQL and polished insights.

Genie spaces handle Text2SQL, a locked UC tool routes each call to the right space, domain-specific ChatAgents format and guardrail the results, and one autoscaling Model-Serving endpoint delivers answers in Teams :no ad-hoc SQL or spreadsheets needed.



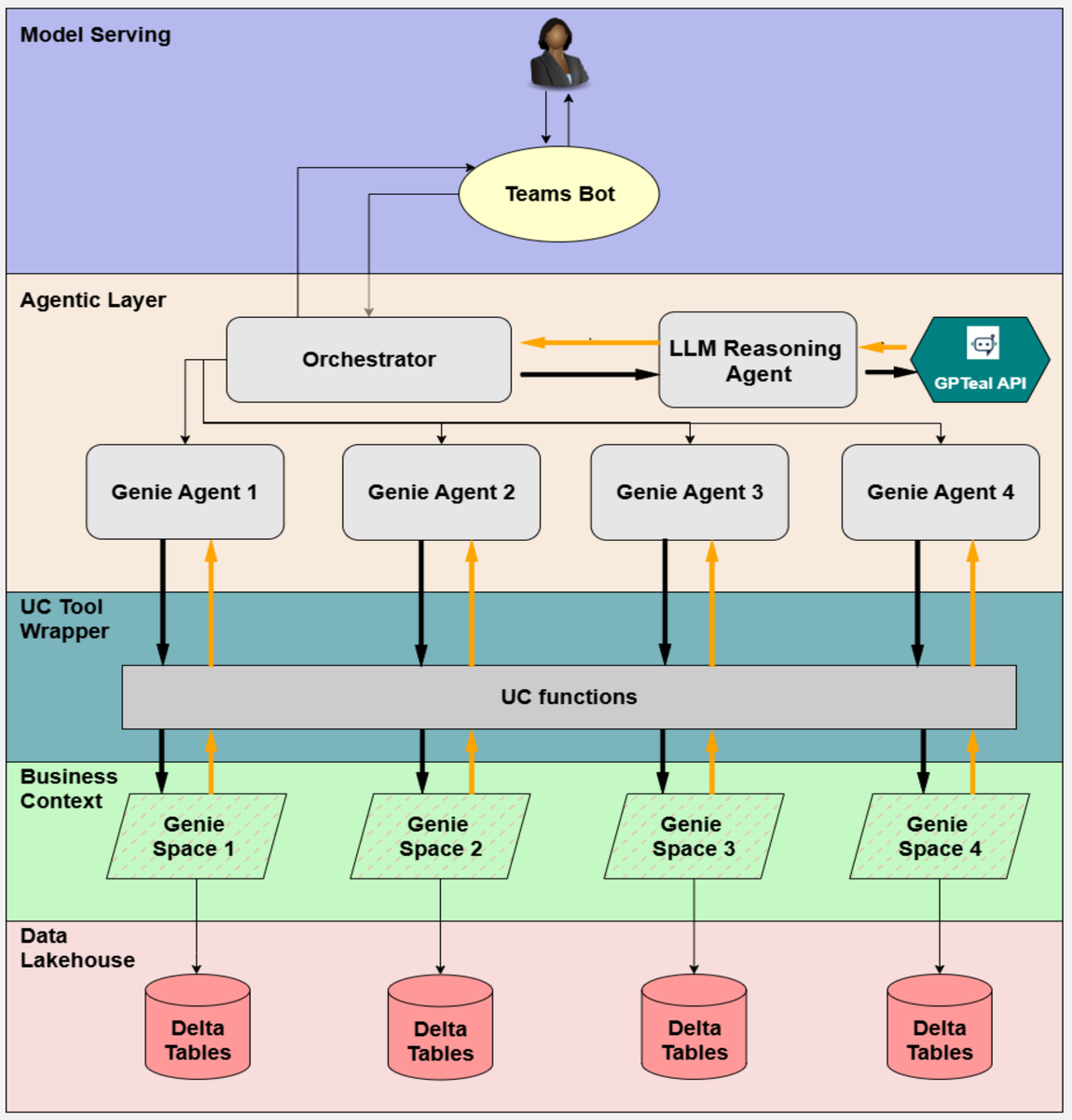
Approach

- We began by configuring Genie Spaces in Databricks, enriched through Unity Catalog with curated metadata, business logic, and field-level descriptions to guide GenAI interpretation. Custom SQL functions were added to reflect analytical needs like aggregations, filtering, and payer-specific KPIs.
- To support multiple business areas, we designed scalable Genie Spaces, each trained on domain-specific context (e.g., Payer, Market Research). A central Orchestrator routes queries to the appropriate agent and Genie Space based on intent, enabling modular expansion across HHDDA functions.
- Access control and data governance were managed using Unity Catalog's built-in role-based policies, ensuring trusted, compliant insights across teams.



Successes

- Delivered one of the first implementations of agentic AI within HHDDA—and across Merck—by building a GenAI assistant that converts natural language into visual insights in under 12 weeks. Deployed a Genie Space + Agent pipeline for payer analytics and extended it to Market Research.
- This pilot shows how GenAI can replace dashboards, boost efficiency with human-in-the-loop workflows, and free analysts to focus on strategic questions, paving the way for scalable, self-serve analytics.

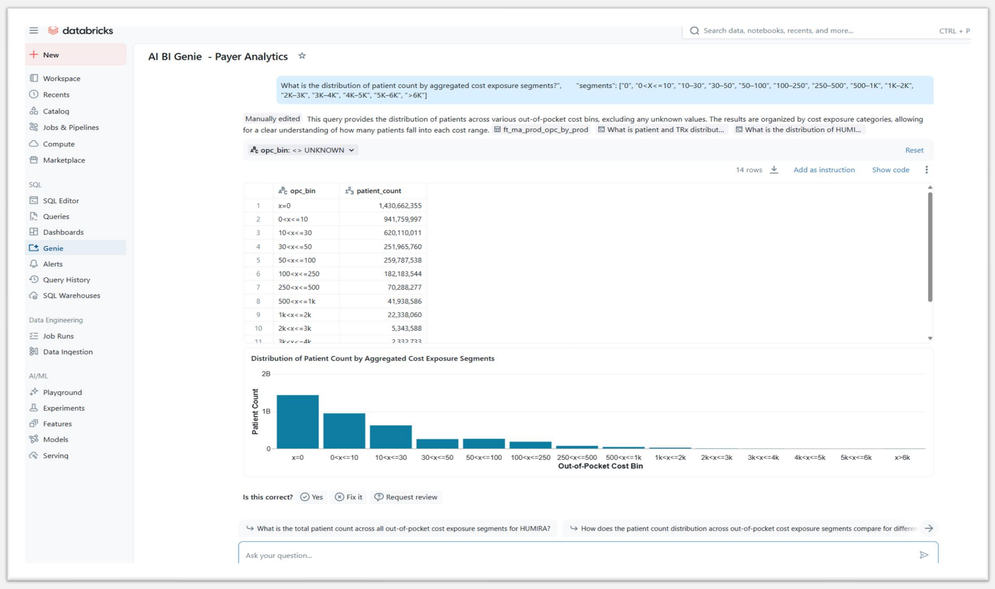


Challenges

Bridging business logic & LLM context was complex, translating stakeholder questions into metadata required deep domain and prompt engineering skills. Integrating Agents with Genie was also new territory. Ensuring accuracy across nuanced healthcare questions was a major challenge for scalable, trustworthy insights.

Lessons Learned

- **AI is a tool, not the product** – True impact comes from embedding GenAI into real workflows, not just showcasing its capabilities.
- **Think business-first** – Framing use cases from a business perspective helped identify common queries and train the LLM more effectively. Semantic clarity and domain-aligned metadata are essential for reliable and interpretable outputs.
- **Innovate with purpose** – Balancing the excitement of new tools like Genie and Agents with actual business value ensures long-term adoption.



Acknowledgments

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