

A fresh look at life sciences commercial priorities

How life sciences commercial teams are rebalancing
resources and leveraging AI to tackle niche market challenges

Life sciences commercial teams operate in an increasingly complex landscape, particularly where their focus is specialty and niche therapies. As a result, commercial leaders are reassessing priorities for their people and budgets. While the mission remains the same—advancing health outcomes—standard approaches to commercialization are becoming outdated. Pathways to success are evolving, shaped by new technologies, shifting market dynamics, and tighter budgets.

To get a pulse on where and how priorities have shifted, we surveyed* 55 senior executives in commercial operations, analytics, technology, and marketing from U.S.-based pharma and biotech companies.

We focused on teams with a commercial remit in rare, oncology, and other specialty and niche markets.

This report shares how teams are refreshing and refocusing their efforts—rethinking strategies, investments, and operations to stay competitive.



*Survey conducted in Dec 2024

Headlines

● **Doing more with less**

76% of the senior executives we surveyed are under pressure to achieve more with fewer resources. Subsequently, they're turning to AI not just for efficiency but as a driver of growth in precision markets.

● **Reallocating resources with AI as a coworker**

AI is evolving from being a tool to a true coworker. It's enabling organizations to shift resources from routine tasks to strategic priorities like predictive analytics and personalized outreach.

● **Closing gaps in the patient journey**

Senior executives rated patient identification and journey mapping as the most critical area for improvement. They plan to leverage non-traditional data sources and expand analytical capabilities to paint a more complete picture of the patient experience.

● **Scaling GenAI across commercial**

85% of respondents are implementing GenAI in at least two or more commercial areas, signaling a shift from pilots to operationalization and scale.

● **Shoring up the data foundation**

Data management and reporting are the top areas commercial teams are prioritizing for “getting back to the basics”—addressing foundational gaps that have plagued recent initiatives.

● **The customer engagement disconnect**

HCP engagement remains a challenge and is the second highest-rated “critical to improve” area, with teams turning to AI to innovate. However, barriers like aligning culture, coordinating field teams, and ensuring cross-functional execution continue to hinder progress.

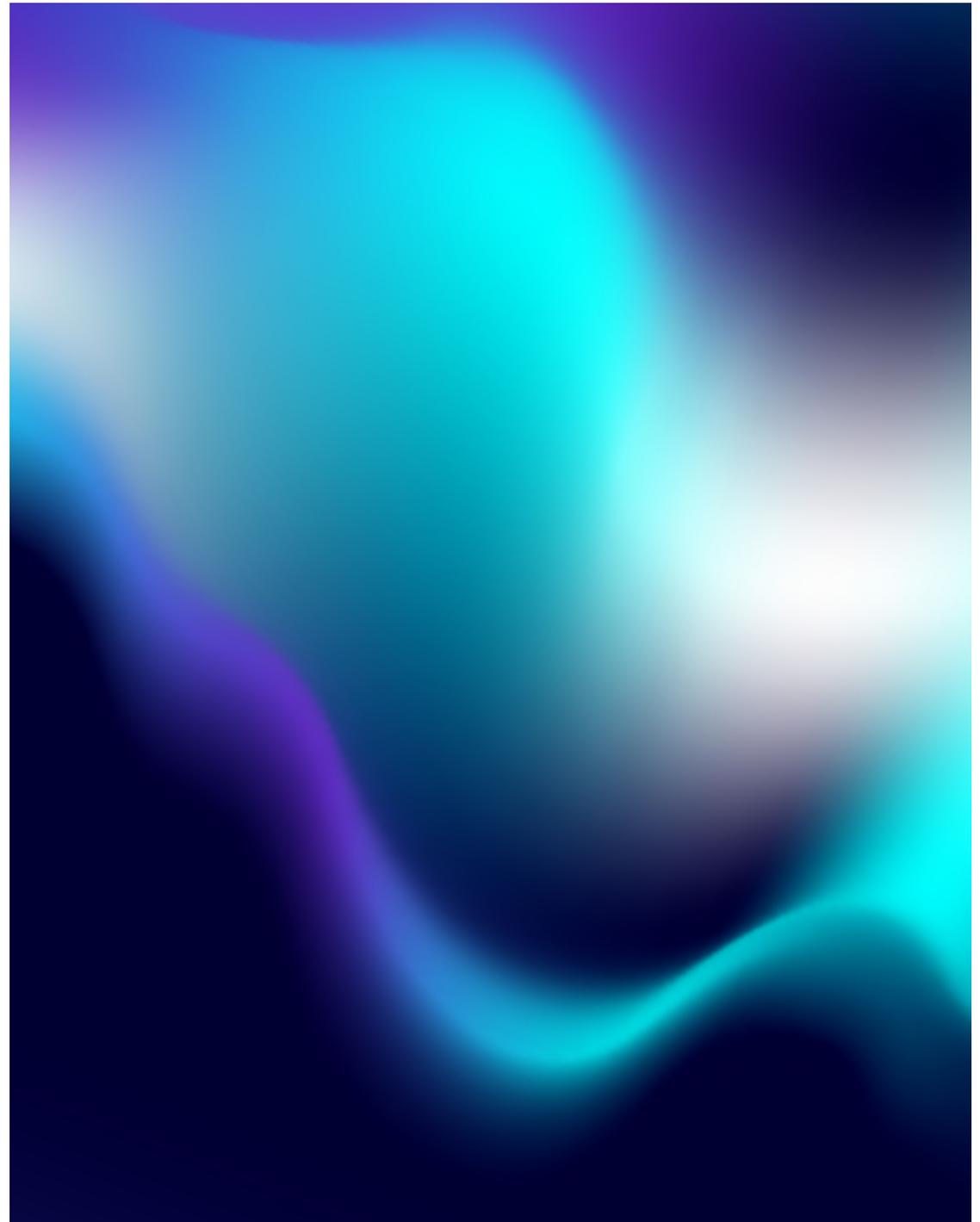


What we expected from the data

Unsurprisingly, the challenge of “doing more with less” is driving widespread reliance on AI and automation, using them as a primary lever for efficiency gains as well as driving value and scaling operations in high-impact areas. We also anticipated the continued focus on emerging data sources and analytics to deepen customer understanding and enhance precision.

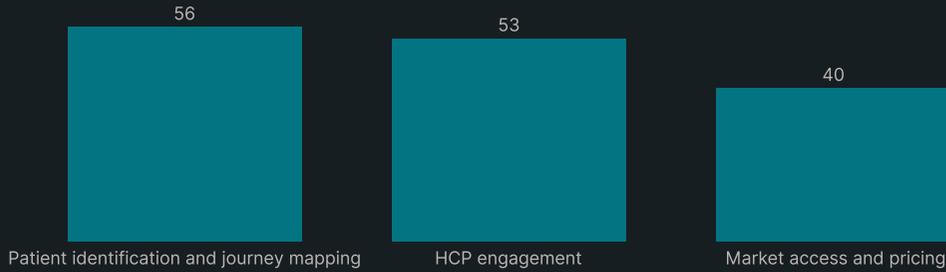
What we also saw in the data

The real story, however, is about reallocation and alignment. Many are reinvesting in foundational priorities like strengthening their data ecosystems, ensuring they build these efforts on a scalable, future-proofed infrastructure that fuels sustained innovation.



? "How is your team prioritizing the following activities?"

Critical areas to improve



Get better at the basics



Tear it up and start over



Functional areas asked about: Market access and pricing, Patient engagement, HCP engagement, Forecasting, Segmentation and targeting, Campaign and ROI measurement, Data management, Sales force sizing and alignment, Reporting and insights, Patient identification and journey mapping, Customer relationship management, Patient support and hub management.

Key areas for investment: Strengthening the foundation

Nearly half of respondents (47%) have a major focus on elevating the basics of data management, followed by customer relationship management (38%) and reporting and insights (36%). Many teams are also refreshing their approach in core areas like patient identification and journey mapping, HCP engagement, and market access—their top three critical areas for reassessment and improvement.

Change will likely be iterative and adaptive—only 11-16% of respondents are tearing up and starting over in key areas. It seems most companies will be trying to upskill their organizations with the least disruption, reflecting the broader trends we've observed for more pragmatic modernization.

Key areas for innovation: GenAI scales across commercial functions

“Which data, analytics and technology initiatives are your team working on?”

Functional areas asked about: Market access and pricing, Patient engagement, HCP engagement, Forecasting, Segmentation and targeting, Campaign and ROI measurement, Data management, Sales force sizing and alignment, Reporting and insights, Incentive compensation, Patient identification and journey mapping, Customer relationship management, Patient support and hub management.

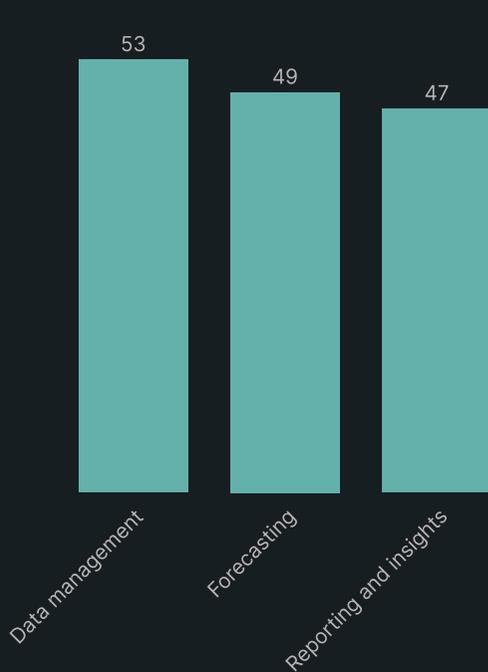
Understandably, leaders cite AI and other advanced technologies as specific investments to improve their performance in these areas.

Very soon, teams hope to see AI and automation progress from theoretical commercial drivers to catalysts for precision-driven growth.

For example, GenAI is moving beyond pilot projects to operationalization and scale, with 85% of teams implementing GenAI across at least two commercial functions and 73% across three or more.

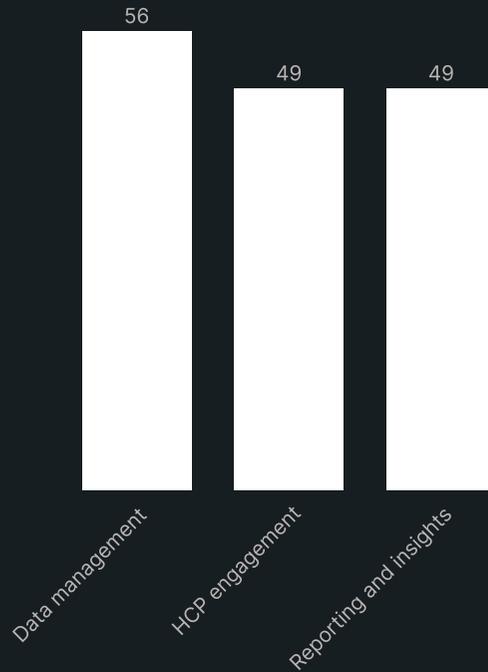
91%

Expanding analytics capabilities



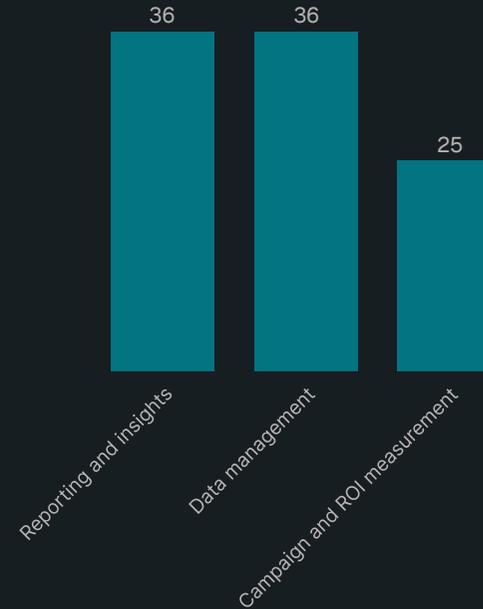
87%

Implementing GenAI



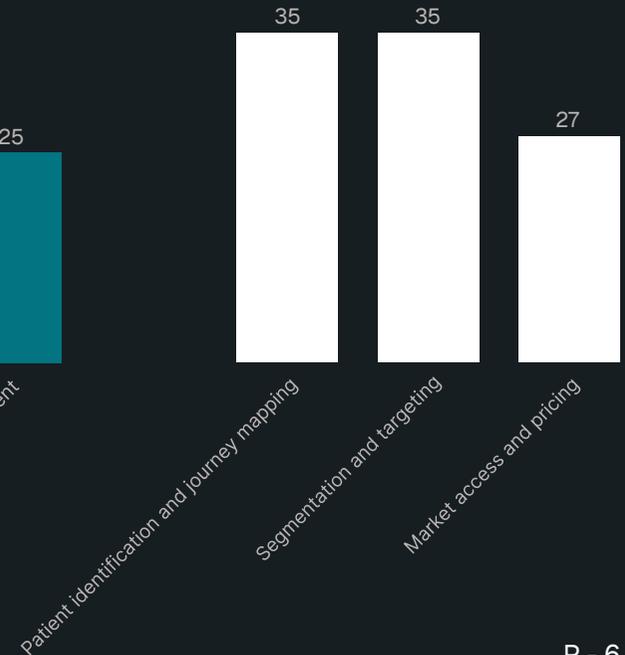
78%

Upgrading tech stack



84%

Integrating non-traditional data sources



Commercial teams say they're doubling down on technology investments in these key areas:

● **Data management**

While strengthening data foundations is critical for the success of AI and analytics initiatives, companies are increasingly leveraging AI itself to improve those foundations. AI is transforming how foundational work gets done, from enriching datasets by connecting disparate sources and filling gaps to automating data harmonization and quality checks. By embedding AI into foundational processes, companies can unlock cleaner, more connected data, setting the stage for precision-driven insights and decision-making.

● **Patient identification and journey mapping**

Mapping the true patient experience has been an aspirational goal, but it is becoming more tangible. Advancements in combinatorial analytics and the ability to harness and integrate non-traditional and unstructured data sources are driving this progress. These innovations could enable earlier patient identification, timely interventions, and a more complete view of the patient experience. But teams will continue to face significant challenges, including navigating privacy concerns, capturing and connecting disparate data sources, and tailoring approaches to specific patient populations.

● **Reporting and insights**

Teams are increasingly leaning into AI to transform how they access and apply insights. Reporting is becoming more actionable and intuitive, from democratizing insights—with self-service dashboards and personalized views for specific roles—to using visualization and storytelling. Advances in conversational AI and GenAI enable home-office teams to query data and receive instant summaries or tables, simplifying report generation and freeing time for deeper analysis.

● **HCP engagement**

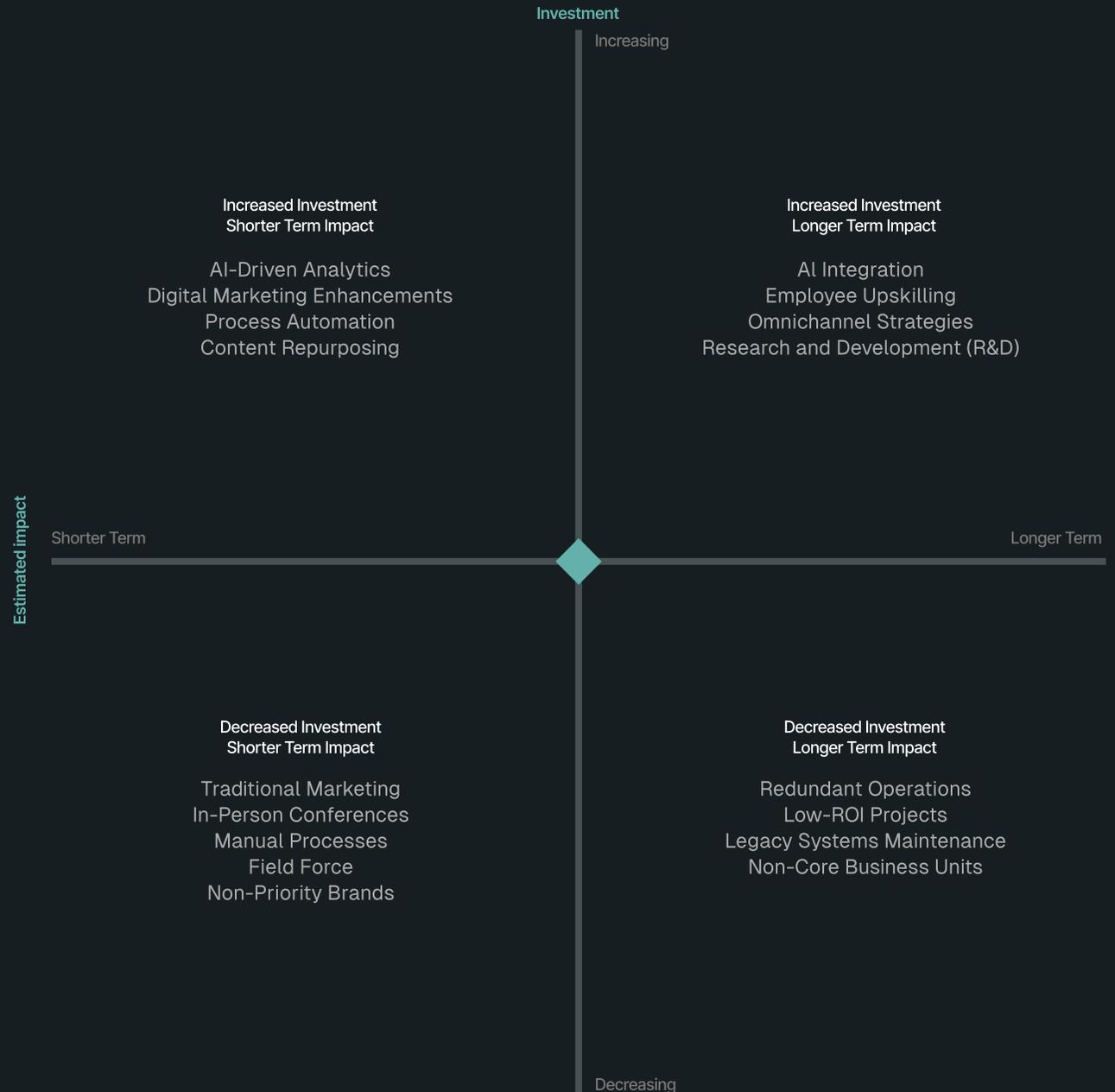
Companies are increasingly leveraging AI and advanced analytics to innovate in HCP engagement, driving initiatives like next-best-action (NBA) recommendations and hyper-personalization. However, many teams are grappling with the complexities of predicting customer behavior, connecting siloed data, and scaling AI-driven solutions to deliver a consistent, customer-centric experience. Beyond technology, cracking the omnichannel code will require teams to solve challenges around cross-functional alignment and coordinating insights across teams and customer sets, including local knowledge and patient, account, and payer influences.

Doing more with less: Reallocating resources with AI as a coworker

Despite increasing investments in new technologies and improvements in multiple areas, the majority (76%) of commercial teams focused on niche segments are being asked to achieve more with fewer resources. This pressure is most pronounced in large pharma companies (84%), though small to mid-sized pharma (74%) and biotech (71%) companies are also feeling the strain.

To navigate this reality, leaders are making strategic choices—using AI not just as a tool for efficiency but as a “coworker” that augments human efforts and enables more impactful resource allocation. Rather than solely cutting costs, companies are reallocating resources from lower-value activities to areas that drive greater precision and scalability

How teams are shifting resources to “do more with less”



Analysis of free text responses for what investment areas teams are cutting and creative and innovative tactics they're testing to "do more with less".



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