Refreshed and refocused for 2025

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

BEGHOU CONSULTING

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 While the mission remains the same—advancing health outcomes—standard approaches to commercialization are becoming outdated.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 in December 2024. 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 in 2025—rethinking strategies, investments, and operations to stay competitive.
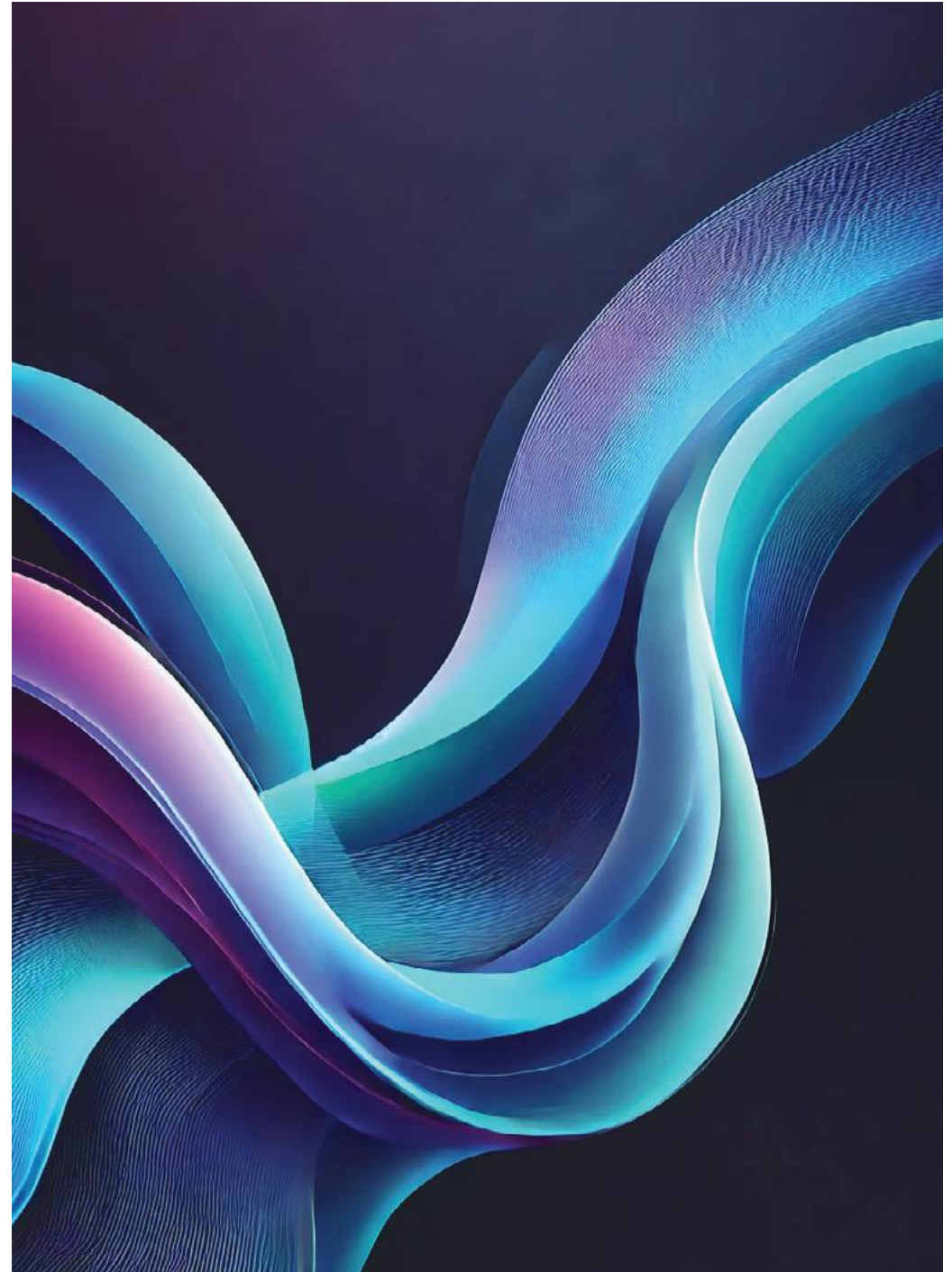
Headlines

- **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.
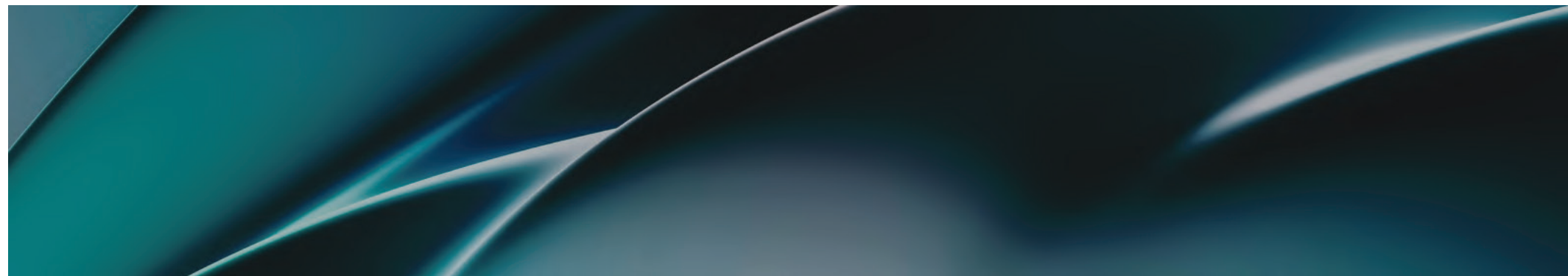
What we expected from the data

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.
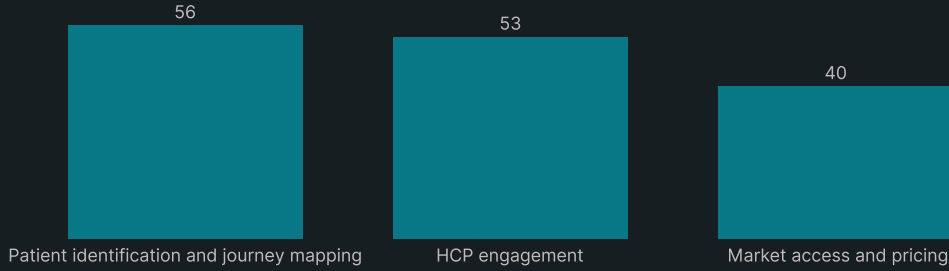
What we also saw in the data

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.
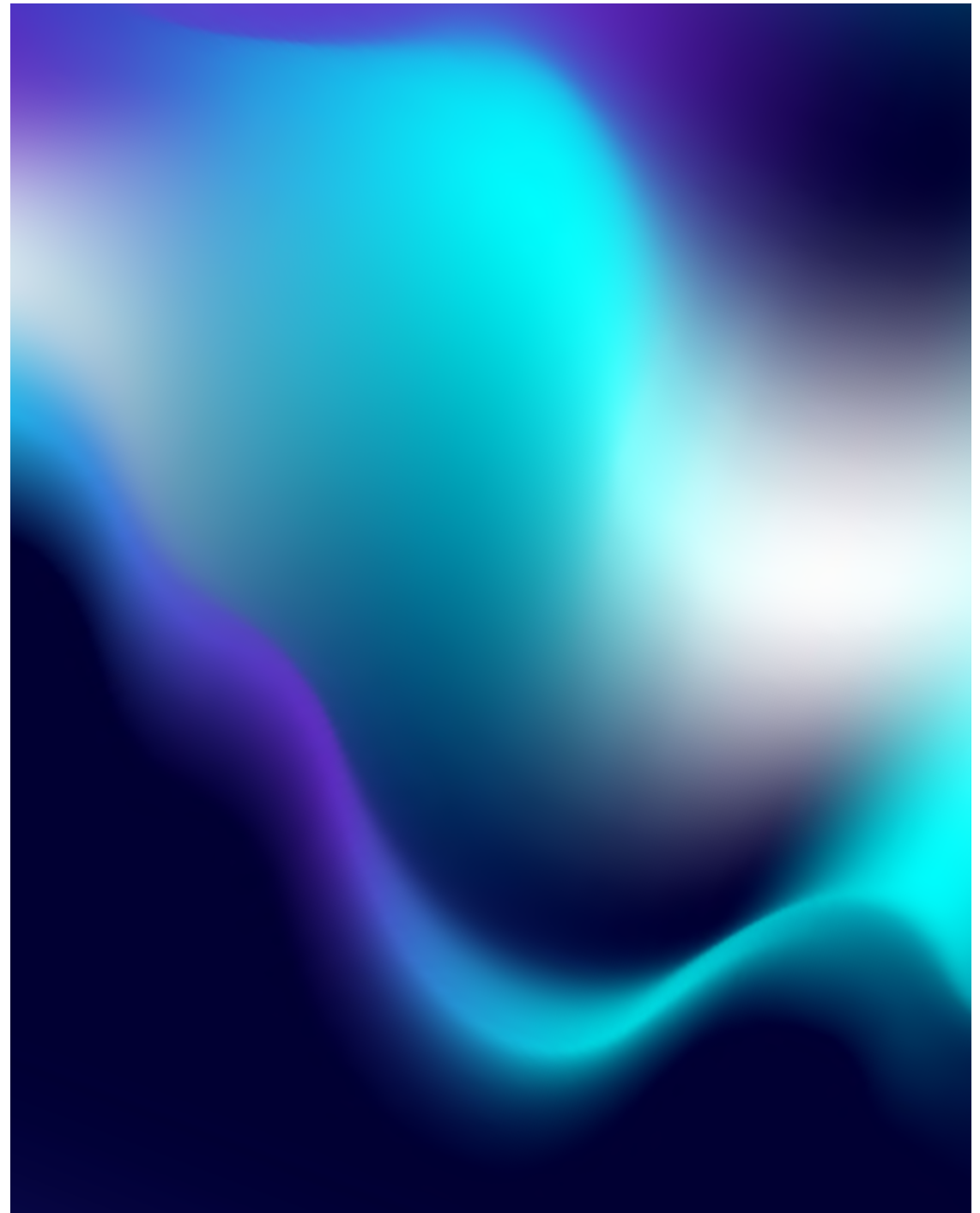
Critical areas to improve

56	53	40
Patient identification and journey mapping	HCP engagement	Market access and pricing

Get better at the basics

47	38	36
Data management	Customer relationship management	Reporting and insights

Tear it up and start over
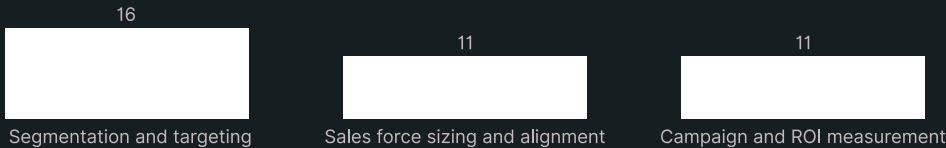
16	11	11
Segmentation and targeting	Sales force sizing and alignment	Campaign and ROI measurement

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

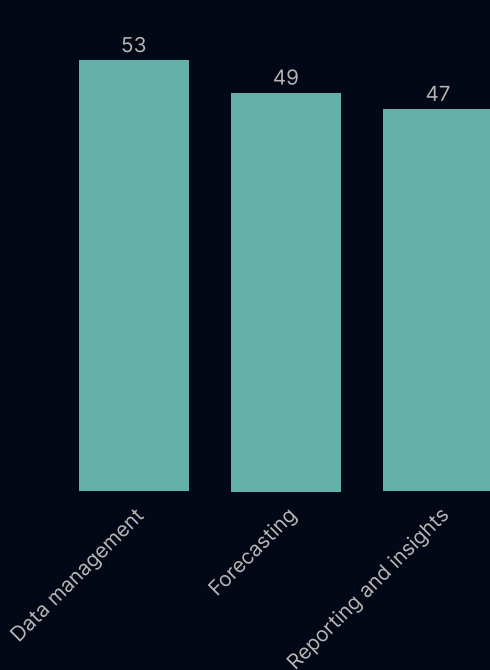(?) "In 2025, which data, analytics and technology initiatives are your team working on?"

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. 2025 is the year 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

Data management	53
Forecasting	49
Reporting and insights	47

87%
Implementing GenAI

Data management	56
HCP engagement	49
Reporting and insights	49

78%
Upgrading tech stack

Reporting and insights	36
Data management	36
Campaign and ROI measurement	25
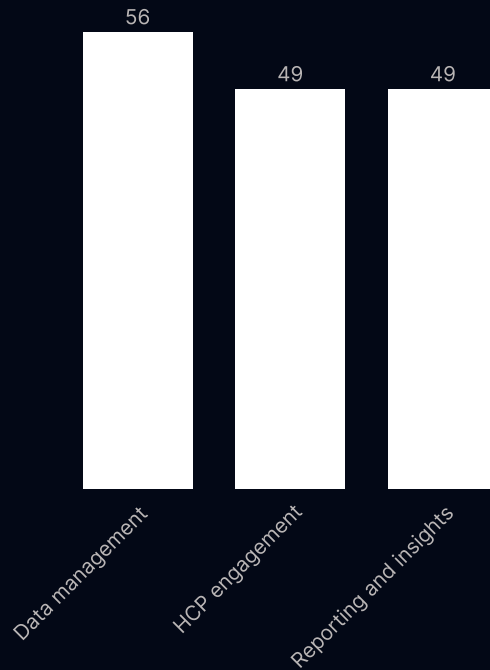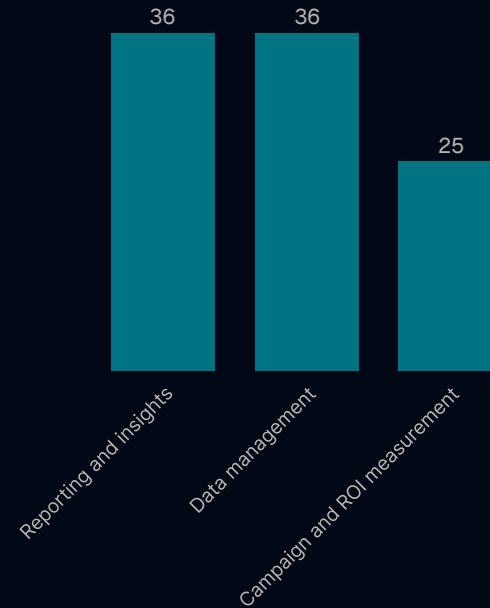
84%
Integrating non-traditional data sources

Patient identification and journey mapping	35
Segmentation and targeting	35
Market access and pricing	27
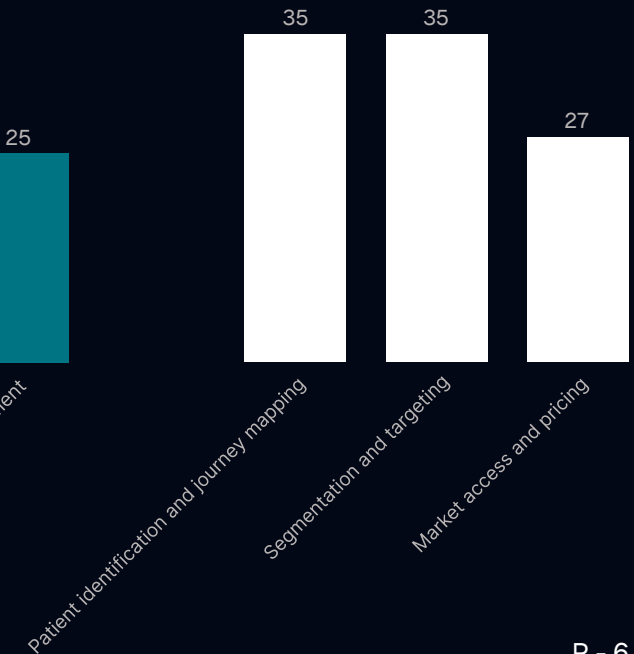
These are the key areas commercial teams say they're doubling down on technology investments this year:

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.

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.

Patient identification and journey mapping

Mapping the true patient experience has been an aspirational goal, but it may become more tangible this year. 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.

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 in 2025. 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"

Investment
Increasing

Increased Investment
Shorter Term Impact

AI-Driven Analytics
Digital Marketing Enhancements
Process Automation
Content Repurposing

Increased Investment
Longer Term Impact

AI Integration
Employee Upskilling
Omnichannel Strategies
Research and Development (R&D)

Estimated impact

Shorter Term — Longer Term

Decreased Investment
Shorter Term Impact

Traditional Marketing
In-Person Conferences
Manual Processes
Field Force
Non-Priority Brands

Decreased Investment
Longer Term Impact

Redundant Operations
Low-ROI Projects
Legacy Systems Maintenance
Non-Core Business Units

Decreasing

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".

Key components for driving progress

There's abundant potential for life sciences commercial teams this year, even with the pressure to do more with less.

While leveraging new technology and data remains a challenge, we've seen clients achieve measurable progress - unlocking efficiency and delivering real value to their organizations.

Here are the key factors we've observed that have set teams up for forward progress and success:

- **Centering around the customer**
  Being more intentional about having patient and provider success be the guiding principle for organizing data, teams and processes, prioritizing initiatives, and sharing cross-functional insights.

- **Strengthening the data foundation**
  Prioritizing investment in a strong, AI-ready customer data ecosystem – integrating both unstructured and structured data (e.g., claims, lab scans, open notes, patient voice, etc.)

- **Scaling technology with upward compatibility**
  Implementing platforms and tools that are flexible and modular - designed to meet today's needs while evolving to support additional brands, new therapeutic areas, and evolving regulatory and privacy requirements.

- **Building agility into operations**
  Developing more simple, adaptable commercial operations and analytics workflows that allow for increased responsiveness to market and customer dynamics.

- **Driving adoption and momentum**
  Building trust and uptake with field force and home office teams through transparency, change management, internal champions, upskilling, and communication of early wins and impact.

- **Measuring and improving for sustained impact**
  Tracking and learning from results and quantitative and qualitive feedback to drive continuous improvement – while also periodically assessing your key priorities for investment and innovation.

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Email refresh@beghouconsulting.com for our **Commercialization Tech and Data Accelerator** worksheet to uncover gaps, identify opportunities, and strengthen the foundation for progress and sustained success.