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Accelerating the future
End-to-end transformation of pharma's commercial activities

Life sciences and healthcare predictions 2030

Deloitte Centre *for*
Health Solutions

End-to-end transformation of pharma's commercial activities

Customer-centric, platform-based commercial models have enhanced productivity and the customer experience

Prediction 2030

Pharma's commercial operations comprising marketing, sales, order management, fulfilment and patient support programmes (PSPs), have been fully digitalised. AI-enabled technologies are firmly embedded across commercial operations, simplifying end-to-end processes and increasing efficiency and cost-effectiveness. This transformation has been driven through partnerships with AI-powered data cloud providers and customer relationship management (CRM) providers. Decision-making across the commercial function has been accelerated by establishing a trusted, open, integrated data platform that meets the demand for products and services in an optimal way. New models of healthcare professional (HCP) and patient engagement signify a move from a product-centric to a customer-centric approach, with agile operating models and digital tools deliver personalised marketing and support based on data-driven, actionable insights. The cost-to-serve has been reduced significantly, and customer experiences elevated, increasing brand advocacy, customer loyalty and spending patterns. The field force has been radically streamlined and realigned, with a focus on virtual touchpoints. Pharma companies outsource some for aspects of their commercial value chain, allowing them to focus on their core competencies. They have also adopted innovative marketing and pricing models in response to growing regulatory scrutiny, offering price reductions in exchange for access to patient data, and establishing a value-based funding approach. AI-enabled pharmacovigilance (PV) and PSPs, that engage HCPs and patients from diagnosis through ongoing care, are crucial in ensuring the safe use of medicines, equitable access, detection and mitigation of potential risks and adverse events (AEs), and improved adherence.

The world in 2030

- Pharma companies have a holistic 360-degree view of the customer, leveraging AI-enabled platforms to connect internal and external data and provide a deep understanding of buyer needs and behaviours within a centralised, automated, and customer-focused insight system.

- There is early engagement with stakeholders using AI-powered CRM platforms to maximise the power of cross functional data, particularly real-world data (RWD), to communicate a product's value, improve launch and commercial performance, and support PSPs.

- Companies direct commercial activities towards the right market segment at the right time by leveraging omnichannel campaigns based on the needs of each stakeholder, resulting in quantitative and qualitative benefits and shorter time-to-value.

- A consistent tone of voice in sales and marketing initiatives, and customer support, education and patient portals fosters stronger relationships and improves engagement.

- Key marketing technologies such as CRM systems, automation and e-commerce prioritise the patient experience, with budgets shifting from field forces to dedicated customer experience teams with a deep RWD-enabled understanding of patients' conditions, values, and desired health outcomes.

- Automated order and account management platforms provide a single view of the customer with tracking, automated confirmation, query management and swift invoicing. This has reduced human error, order lead time, the risk of lost payments and strengthened working capital.

- Digital twins have revolutionised pharma commercial models by simulating real-world market dynamics, patient behaviours, and treatment pathways.

Conquered constraints

Skills and talent
Commercial teams adopt advanced analytical, cognitive digital and AI skills, across all functions. Data scientists and software engineers have designed high quality digital PSPs with differentiated content to meet HCP and patient needs. A realigned field force has transitioned from a push to a pull model augmented by next generation coordination tools, customer-first skills and collaboration. Commercial leaders foster an agile, cross functional culture of entrepreneurialism, and design thinking.

Funding and business models
Companies have implemented data-driven incentive structures and advanced CRM systems that leverage machine learning (ML) to monitor customer experiences. They have also introduced new 'win-win' pricing models, moving away from price-per-unit to volume based contracting models, pay-over-time models and subscription-based models.

Regulation
Compliance with global regulations is seen as a value driver, balancing pharma innovation with equitable access and fair pricing practices. Commercial success hinges on ensuring robust patient privacy and an agile approach to risk-based 'connected compliance' including proactive risk mitigation, advanced data analytics and visualisation tools to leverage disparate sources of relevant data, monitor omnichannel interactions between sales reps, HCPs and patients, and to detect and report AEs to regulators.

Digitalisation and data
Companies harness cutting-edge data analytics, ML, and cloud-based platform hubs to aggregate and unify customer data. They gather deep customer insights and apply FAIR (findable, accessible, interoperable, and reuseable) data management practice. Companies have prioritised the development of technology assets that establish a cohesive and interconnected infrastructure with a high level of connectivity and interoperability that supports secure and transparent data exchange.

Imagine the world in 2030*

The use of digital twins in commercial operations

Ade leads the commercial function's launch operations for Carvask, a pharma company specialising in cardiovascular disease. In 2026, Ade pioneered the company's use of digital twin technology to orchestrate the launch of a highly effective preventative drug for hypertension. The digital twin simulated various market access scenarios, pricing models, and reimbursement negotiations, to identify optimal launch strategies, initial uptake and long-term adherence. He leveraged insights from the simulation to implement a dynamic, region-specific approach to product launches, each adapted and customised to the target market and market authorisation requirements. The use of digital twins enabled Ade's team to craft a highly targeted marketing campaign that resonated with the different groups of key stakeholders, including HCPs, patient advocacy groups, patients and carers in each market. The hypertension campaign was built by simulating individual customer journeys, deemed typical of the different types of cardiovascular patients, and predicting responses to various messaging strategies to build customised omnichannel marketing materials. The digital twin was also used to optimise resource allocation by modelling demand uptake curves, proactively identifying potential supply chain bottlenecks, to ensure timely access to medication. This critical information was seamlessly relayed to the logistics team, and the company's R&D and medical affairs functions, using a CRM platform, which guaranteed a smooth rollout. In 2029, Ade and his team won an industry marketing ward for the campaign's success in patient activation and continued adherence.

Placing customer centricity at the heart of pharma commercialisation efforts

In the early 2020s, Joe, the Chief Operations Officer for a large pharma company, saw that the industry was on the brink of a seismic culture change and that the future would require a fundamental rethink in how his company interacted with HCPs and patients. He led an his company's end-to-end digital transformation of the company, partnering with innovative cloud and analytics platform provider to develop a 360-degree view of each customer, enabling his team to deliver unprecedented levels of personalised service. Since then, digital portals and virtual tools have become the primary channels for HCP and patient engagement. However Joe is also aware that some HCPs and patients prefer face-to-face contact. Therefore, he deploys the company's resources so that they receive personalised and convenient access to information, support, and treatment advice. This customer-centric approach has extended to pricing with Joe championing the introduction of value-based pricing models, and in some cases subscription models, to ensure that life-saving treatments are accessible and affordable for all, regardless of their socioeconomic status.

This shift in organisational culture has enabled Joe to implement flexible pricing across the company's different markets, customising the pricing models to the economic and regulatory environment. Joe encourages his team to build meaningful relationships with all internal functions and external stakeholders. His team's performance i no longer reviewed and rewarded for sales volume, but instead uses HCP and customer feedback.

Embedding proactivity into pharmacovigilance functions

Karin leads the pharmacovigilance monitoring team in a large pharma company, championing a patient-centric approach to pharmacovigilance by leveraging multiple sources of interoperable health data including academic reports, social media posts and patient reported actions within PSPs. This provides a full picture of the use, outcomes and potential risks of each of the company's therapeutics. Over the past two years, she has integrated a real-time patient data monitoring platform, powered by AI, that, alongside PSPs, have enabled the team to track and engage patients remotely and in real-time, to determine when an intervention is needed. Using predictive analytics, the platform anticipates potential risks and optimises treatment strategies for individual patients. Every interaction and data point contributes to a comprehensive understanding of a drug's safety and efficacy profile throughout its lifecycle. Through the platform, Karin's team shares the data with the compliance function and therapy area teams to comply with regulatory reporting requirements and progress the development of follow-on indications and drug repurposing with the wealth of data collected strengthening regulatory submissions.

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* Note: All elements on this page are from a perspective of 2030 and are fictional

Evidence in 2024

Strategies to improve HCP engagement

A top-10 biopharma company unlocked 14% higher sales in just 9 months by activating next best action (NBA) programmes and partnering with **Aktana** to bridge the gap between strategy and execution. This resulted in sales reps reaching HCPs who had been unresponsive in the past, uncovered opportunities with HCPs who weren't on their radar before, and pinpointing the right time and right content on digital channels to maximise engagement and proactively identify timely patient alerts.[1]

Digital-first PSPs for caregivers of paediatric patients

A pharma company identified a need to support caregivers responsible for administering a daily subcutaneous injection for a paediatric brain disease. Patients require daily injections, starting at two or three years old and continuing up to 18 years of age. Carers often need educational, emotional and injection training support. **IQVIA** developed a caregiver-facing platform providing personalised educational tools, injection training and a tailored action plan, to build confidence and self-efficacy, and adherence support. In addition, patients and carers can use a nursing app for either face-to-face or remote support. The programme has an average compliance rate of 95% and was initially rolled out in two countries. Based on its success it was extended to another six countries, supporting patient uptake and adherence by providing a flexible and scalable approach tailored to local markets.[2]

Digitalising manufacturing and inventory management

Sanofi is digitising quality assessment processes, moving from paper to electronic batch records, to improve asset utilisation and increase productivity by implementing new manufacturing 4.0 capabilities. Sanofi has also developed an in-house AI-enabled yield optimisation solution which learns from experience to achieve consistently higher yield levels. This helps to optimise usage of raw materials, contributing to the company's environmental objectives, and supporting improved cost efficiency. Adoption within Sanofi's biopharma supply chain has enabled the team to predict 80% of low inventory positions, allowing them to take mitigating action to quickly address the shortfall.[3]

Improving the security of patient's identifiable data

In October 2024, **Boehringer Ingelheim** reached a significant milestone in its journey towards transforming Boehringer's Patient Engagement Capability by successfully implementing and deploying its Patient Identity Management function. Specific achievements include establishing a unified source of truth for all consented patient identities across all brands; setting up a secure data processing, business data, stewardship and IT support operation, with strong security protocols and data governance processes, involving close collaboration and guidance from its Data Privacy and IT Information Security teams; and creating a blueprint for secure patient data handling, access controls, and governance that can be extended to its Patient 360/Identified Data Warehousing, Patient CRM, and Patient Enclave needs. This pioneering work in establishing a secure data governance operation for patient identifiable data is expected to measurably enhance the patients' experiences and was made possible by the hard work of a large cross-functional team.[4]

Countries are implementing value-based pricing systems

In **Germany**, the **Gemeinsamer Bundesausschuss** assesses the value of new prescription drug based on patient outcomes, using evidence of direct clinical outcomes to determine the benefit to patients. This assessment is used to negotiate a single price in exchange for providing coverage with minimal access restrictions.[5]

Under **Australia's** single-payer healthcare system, the **federal government** sets prices purchased through the pharmaceutical benefits scheme (PBS). To recommend a price, two independent committees analyse whether a health condition has few or no other treatment options, the extent to which a new drug is a significant clinical advancement, the total cost to the PBS, and the economic benefit associated with the drug's impact.[6]

High impact digital market campaigns can increase sales success

Silka, selling an over-the-counter (OTC) topical cream, partnered with **Cardinal** to launch a multimedia campaign, including high-impact videos, that increased new users by 20,719% and 18,487% increase in page views.[7]

Streamlining the order process

Teva Pharmaceuticals achieved real-time integration between SAP and Salesforce to foster a streamlined sales and ordering process. Salesforce was configured for real-time communication with Teva's enterprise resource planning team ensuring a synchronised and efficient sales and ordering process. Apex Code has been refactored for enhanced efficiency providing a more agile and adaptable framework for Teva's evolving business needs. Custom Metadata Types have been created to address the complexity of different business processes in different countries to enable scalability while adapting to changing market demands. Comprehensive training empowers end-users to address unpredicted challenges promptly.[8]

Artificial intelligence and the transformative power of GenAI

The impact on the commercial model

Deloitte experts have estimated that a top 10 biopharma company with average revenue of US$65-75bn could capture between US$5-7bn of peak value by scaling the use of AI over 5 years. The commercial function could realise 35% of this value. Revenue uplift levers comprise increased patient conversion rates and time to and on the therapy (55%), and cost reduction levers comprise marketing content creation and payer contract administration (45%).[9]

Marketing

AI can analyse patient profiles, such as medical history, and online behaviour, to tailor marketing messages to individual needs and preferences. GenAI can be used to create engaging and informative content for blog posts, social media updates, and tailored email campaigns. AI algorithms can optimise advertisement spending by predicting customer behaviour, optimising channel strategy, and delivering personalised messaging to the right HCPs and patients at the optimal time.
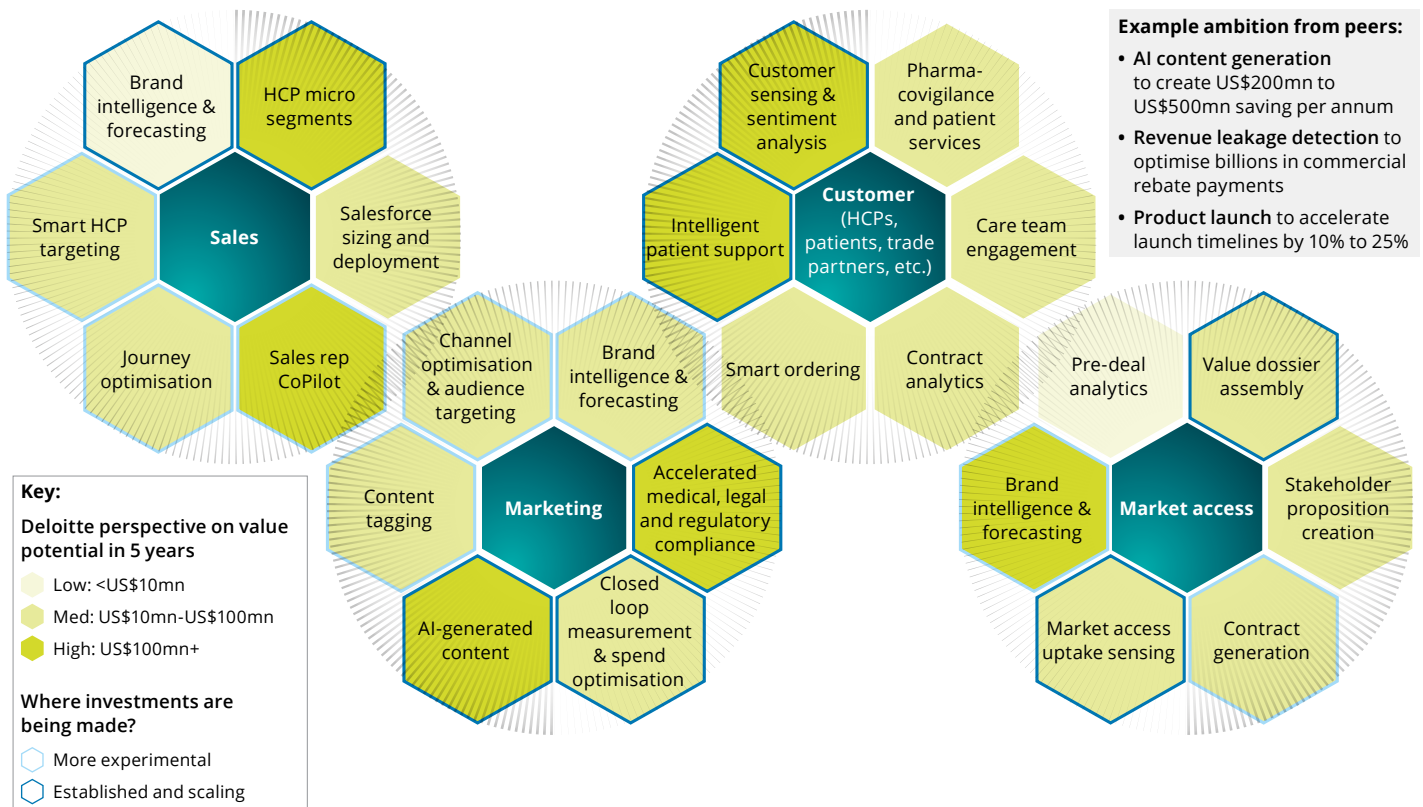
Sales

AI can analyse sales data and customer interactions to identify the most effective actions for sales reps, such as which HCPs to target with specific products or opportunities for upselling and cross-selling. AI-powered chatbots can interact with HCPs online, providing information about products, answering questions, and scheduling appointments with sales reps.

Launch and market access

AI technologies can help biopharma companies coordinate product launches better, establish proof of value to support reimbursement models for new curative therapies and services and improve patient engagement. GenAI can enable internal teams, agencies, and technology to interact seamlessly through a streamlined medical, legal and regulatory compliance process.

The 'string-of-pearls' approach to commercial strings together multiple use-cases to transform the entire process

Example ambition from peers:
- **AI content generation** to create US$200mn to US$500mn saving per annum
- **Revenue leakage detection** to optimise billions in commercial rebate payments
- **Product launch** to accelerate launch timelines by 10% to 25%

Key:

Deloitte perspective on value potential in 5 years
- Low: <US$10mn
- Med: US$10mn-US$100mn
- High: US$100mn+

Where investments are being made?
- More experimental
- Established and scaling

Source: Deloitte analysis.

Order management

AI can automate many aspects of order processing, such as verifying insurance coverage, checking drug interactions, and generating shipping labels, freeing up staff to focus on more complex tasks. By analysing historical sales data, market trends, and external factors, AI can predict future demand for pharma products, enabling companies to optimise inventory levels and prevent stockouts.

Fulfilment

AI can optimise delivery routes, track shipments in real-time, and proactively identify potential delays, ensuring that products reach patients and healthcare providers on time. AI-powered systems can monitor inventory levels, predict when to reorder products, and automate the replenishment process, reducing waste and ensuring that medications are always available when needed.

PV and PSPs

AI can analyse large volumes of data from various sources, including electronic health records, social media, and AE reporting systems, to identify potential safety signals for drugs much faster than with traditional methods. GenAI can personalise PSPs leading to better adherence and health outcomes and can also identify individuals who may be at higher risk of experiencing adverse events, enabling proactive intervention and personalised risk management.

Examples in 2024

Gramener uses GenAI to swiftly generate content compliant with regulatory guidelines and support sales training with GenAI bots. The software can save up to 60% of the time spent on marketing tasks, resulting in quarterly savings of US$200,000.[10]

Pfizer is revolutionising its pharma marketing with a GenAI platform called 'Charlie'. Along with helping with content creation and editing, GenAI also helps with fact-checking and legal reviews. Charlie is integrated across the marketing function as a workbench for obtaining media analytics, and competitor insights.[11]

ArisGlobal has created LifeSphere, a suite of platforms that help global life science organisations leverage data technologies to advance compliance, insights, and patient safety across the R&D lifecycle: Safety, Regulatory, Clinical, and Quality. Each platform integrates LifeSphere NavaX, the company's next-generation cognitive computing engine, to accelerate the adoption of advanced automation and the latest GenAI technologies. Across each domain, this includes information management to accelerate processes and reduce the risk for: pharmacological product compliance management, seamless document and content management, consolidation of submissions and process management, and end-to-end tracking and reporting that improves communication and collaboration across teams.[12]

Endnotes

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