



2025 ZS biopharma commercialization report

Trends that are modernizing the go-to-market model

By Maria Whitman, Joe Stevens, Todd Burgess, Colleen Stubbs and Ayushi Sahastrabudhe



Each year, ZS delivers thousands of trends conversations, topical innovation sessions and benchmarking perspectives to our biopharma clients. Recently, these conversations with executives had a noticeably different tenor with respect to commercialization:

- Recognition that there's now no margin of error for execution
- Urgency to drive efficiency and savings while pursuing advanced levels of effectiveness
- Willingness to build toward a different status quo—with AI, of course, but also by starting to break down long-held beliefs about how we go to market

Not all of these translate to outwardly bold moves, but they lead us to a tipping point in thinking and willingness to act toward real change in what's historically been a consistent commercialization model across most of the pharmaceutical industry: rep-led, product-centered and prescriber-focused. For competitiveness and top-line success, leaders are asking more about how to change in ways that drive real and differential impact with customers—advancing them along a journey at every touch point.

This change prompts many conversations, questions and calls to action. Some we hear most often are:

- “We need to launch flawlessly, but differently. How can we reduce the time to peak? How digitally forward can we be? How do we truly integrate functions for success?”
- “What is the real role and value of the rep today? What does good look like with AI? How do we leverage each channel—human and digital—for optimal impact?”
- “Consumerism is more real because of how patients seek care, when they engage and their role in some of my therapy areas. How do we move our dominant healthcare provider (HCP) focus to the right balance of stakeholder effort and engagement?”
- “The talent we have built—at HQ and in the field—is not always aligned with where we need to be in skills and with technology. What does ‘good’ look like and how do we get there?”
- “Profitability is more critical as our products mature. How do we defend our P&L in a time of pullback and increasing payer pressure?”

This report shares insights from ZS surveys, benchmarks and expert analysis, highlighting how top organizations are adapting. We also offer key strategies and predictions on modernizing go-to-market models to blend human and digital engagement for lasting growth.



Winning in the next generation of launch

Pharma's underperforming launches have been long lamented. From 2019-2021, about 60% of pharma launches didn't meet analyst expectations. In the last two years, the picture has improved slightly, but roughly half of all launches have still underperformed. At the same time, the industry has shifted to an "always be launching" mindset, with many large companies readying for more than 10 new launches each in the next two years. But while the number of launches is increasing, the peak of most launches is also getting smaller.

While blockbusters remain significant drivers of revenue, in the past six years, 77% of products launched had revenue potentials under \$1 billion. Modern blockbusters are being built through multiple indications and there is an overall increase in the overall number of small launches as our science advances. Increased competition in many therapy areas and shorter windows of time to recover investments are pushing pharma to prioritize high-value assets, sequence indications strategically and focus on select global markets, "launching big" for some indications while "launching lean" for others.

To ensure a prosperous future for the industry and the continued funding of innovation, it's critical to improve launch outlook and performance. The question is how. We see the answers in how companies prepare for launch and leverage technology and AI.

Market shaping gains new life

Leading companies have shown a renewed interest in thoughtful market shaping. Though the terms vary across companies, we define market shaping as the art of preparing the market using compliant, cross-functional approaches to prime the ecosystem: different customers, processes and protocols, beliefs and operational elements for our innovation and its regulatory approval. More active market shaping has led to improvements in driving disease awareness, alleviating disease burden, securing access and streamlining care models.

The approach to renewed market shaping is taking different forms. One leading company implemented a cross-functional roadmap, including testing partnership arrangements and engaging providers with a multichannel campaign to support uptake for a new product by encouraging HCPs to reflexively test for a novel biomarker. Another is leveraging a “digital front door” to streamline patient care and enable accurate referrals based on a symptom profile for a rare disease, ensuring that patients can reach a physician who knows about their product and can prescribe it at launch. We worked with one market leader to develop a cross-functional program of market shaping across five key dimensions with feedback loops to compliantly inform relevant preparations for launch, from real-world evidence to clinical care gap strategies to commercial.

Market shaping is providing an edge in launch uptake, especially when companies not only bring out the “what and why” of buying the product but also remove friction early in the process. The remaining challenge is to prioritize these activities and resources at the right time against the existing portfolio. This is just one reason why, on the other side of launch, we are simultaneously helping companies think about when and how to draw resources from mature products to support the balanced portfolio (a separate but important industry trend).

Digital and AI enablement to boost launch success

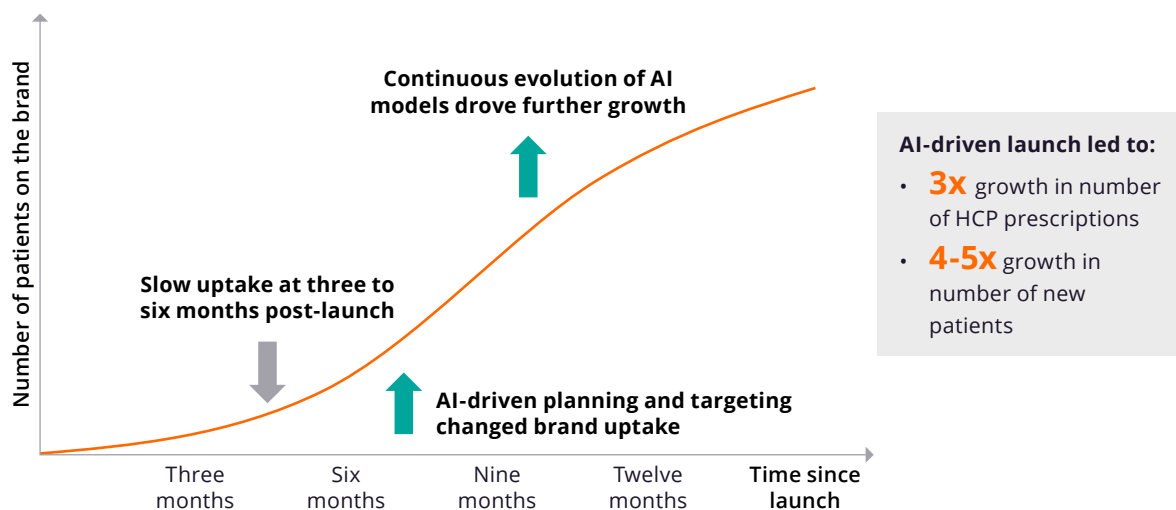
“How ‘digitally forward’ can we be in launch?” has been a pervasive question in recent years. This question has many parts. For instance: “How much can I lean on digital channels? Where and how can I drive efficiency and reduce cost? How do I move faster?” and so on.

Industry leaders are using digital and AI at launch to a much greater extent than in the past. While many companies use AI to orchestrate an elevated customer engagement strategy, some are using digital and AI solutions more boldly across their launch planning and execution phases. The most advanced adopters are improving their launch success by using AI to quickly create content and tailor messages for different segments, cultural adaptations and more. “Best-in-class” companies will use digital and AI technology to predict early adopters, create personalized profiles around needs and beliefs, find appropriate patients and identify care gaps. When they adopt AI systems that can sense, learn and pivot to correct course, companies will improve both launch success and overall revenue.

For example, one industry leader is executing an AI-driven launch to support its brands to dramatically improve its launch trajectory (**Figure 1**). With AI-driven analysis of a combination of secondary data and small, sometimes noisy, market research datasets, the company used information about individual consumers to determine how to fit brand-specific needs and create personalization at launch. This dynamic AI continuously receives new inputs and information about how people are responding to the product, allowing the client to constantly improve the product's strategy.

FIGURE 1

AI can drive drug uptake at launch



For more information, see "Moving toward digitally forward pharma launches," ZS.com.

It will take time for most organizations to truly create and capture the value of AI in launch. But in ZS's recent study with Reuters, we were surprised to see that even in 2024, only 40%-50% of launches leveraged segmented or subnational personalization at launch. And only 10%-15% attempted to personalize at the individual customer level. The lift from personalization is measurable and clear as in the example above, and we believe this is an important step to advance how many more launches are done.

Launch will be an evergreen topic with many more nuances in coming years. For example, we have been bringing new "sense, learn and pivot" techniques to modernize the approach to launch hubs for real-time decision-making to many of our clients. In fact, for a few top companies, the initial launch hub pilots are now becoming a programmatic launch hub capability for organizations. But as we move past launch and into the portfolio, commercial model transformation becomes critical to success.

KEY TAKEAWAYS

- Preparing the market for innovation is regaining recognition as a critical cross-functional program and critical driver of uptake, competitiveness and ecosystem engagement when done early and in a compliant manner.
- Digital and AI tools should increasingly be used in driving personalization during launch. They should also be used to capture signals and responsiveness—both leading up to and in real time during the launch.

Transforming pharma customer engagement

For the last few years, ZS has explored global healthcare trends and the realities of care on the ground in our [Future of Health Report](#). There are many critical findings in the report, but two statistics always prompt executive conversation around the impact to our strategies and model:

- In the U.S., as many as one in three consumers lack access to primary care
- In six of the seven countries surveyed, a majority of consumers said they avoid the healthcare system unless they're already sick

The latter statistic is often quickly attributed to issues of cost, but the answer is just as frequently the hassle of engaging. For too many, it's an uphill battle to get the care they need, let alone afford it.

These statistics resonate because they directly challenge our foundational, linear understanding of the patient journey. And because so much of what we do commercially—how we build our brand strategies, how we develop evidence, how we plan our commercial approach—is rooted in the patient journey, the sheer heterogeneity of how patients engage should cause us to pause and reevaluate this core guiding framework.

Pharma has been talking about commercial model changes for decades, but a tipping point is now prompting changes in multiple directions. For some organizations whose portfolios require an increased consumerization focus, we see clear movement in reprioritization and resourcing away from the HCP. For others where “reach and frequency” is no longer a proxy for impact, specialty nature of product, and so on, there is a redefining of measures toward experience, care gap closure and others. And across the industry, there is a reckoning of the value of the rep—that is, the value of the human in an AI world and when to deploy this human for the most value that our most expensive resource can create.

For our model to have impact tomorrow, we should remember why we engage in the first place: to enable our customers to move forward in a decision or an action. To be relevant. To change behavior in some way. We have proposed an evolved vision for our model that does this not by interacting but by empowering customers. Engaging them in a way that advances them through their barriers. The vision is to drive behavior-changing, personalized customer engagement at scale. But before we can craft a better future, let's look at the data and how each role is doing.

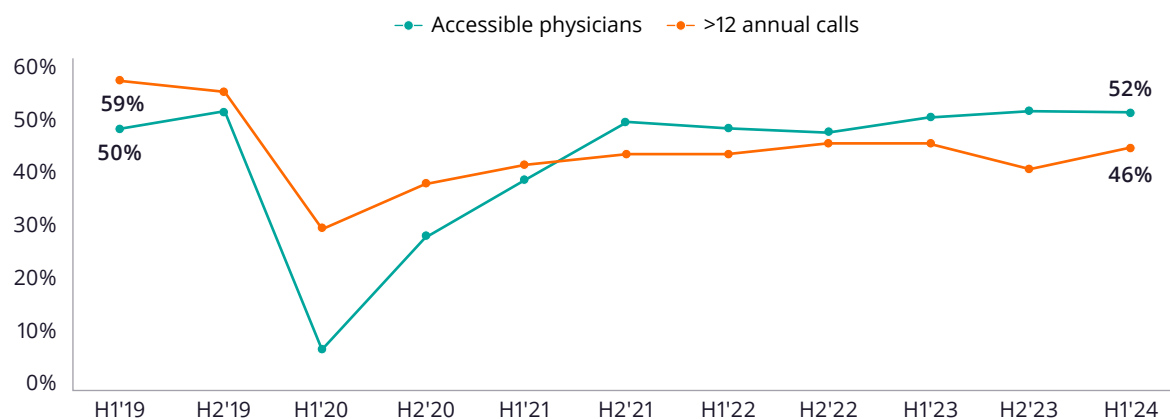
Favored reps bring practice knowledge over product knowledge

ZS Access Monitor™ data shows that while HCPs' overall availability is the same as it was in years past, their willingness to frequently engage with pharma sales representatives is near historic lows (**Figure 2**). HCPs prefer that reps bring practice knowledge twice as much as product knowledge. When reps and HCPs do meet, HCPs are twice as interested in learning about their practice area and how the product may fit into their practice dynamics than they are in hearing company messaging around a product. HCPs are feeling the strain from frequent sales force visits and email bombardment and many disengage or opt out. Our data found that HCPs who received 12 emails per month from a single brand would opt out of emails, no matter how useful or insightful the content was.

Figure 2 measures the availability of HCPs over time. We found that both HCP availability and visit frequency decreased due to the COVID-19 pandemic. The current percentage of HCPs taking more than 12 annual calls is still less than it was before the pandemic. Overall, HCPs may be as accessible as they were in the past, but they're less open to frequent sales visits.

FIGURE 2

The COVID-19 pandemic disrupted physician availability



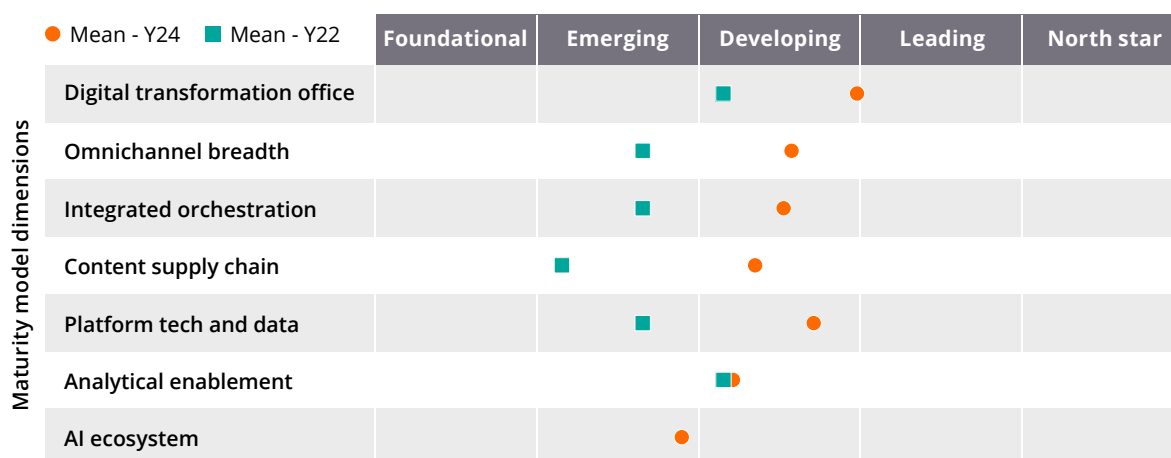
Source: ZS AccessMonitor™

This sends a clear message that pharma companies need to engage HCP stakeholders in new ways. Pharma companies are further investing in digital and omnichannel capabilities to deliver improved personalization and customer impact to make up for decreasing face-to-face promotion opportunities and are instead sending in reps for key conversations.

We've observed an increased maturity in omnichannel capabilities over the last two years across the industry. Most organizations see omnichannel use cases as some of the most promising starting points for generative AI, with examples ranging from field insights through rapid generation and variation. **Figure 3** shows insights from a ZS study that measured omnichannel sophistication among more than 15 large and midsize European pharma companies. We found that significant investments in personalizing content and efficient re-use improved the content supply chain.

FIGURE 3

Dimensions of omnichannel outreach are maturing



Source: ZS 2024 omnichannel maturity study

But what does this mean for the human? For the rep that has been the bedrock of our model? We envision that the role of the rep will evolve from "messenger" to "mainstay." Our research has found that customers want to work with reps who understand their challenges and focus on solving problems rather than delivering messaging about brands. In fact, the best reps have already been demonstrating these behaviors for decades. By moving to a role where they empathize with customers, are entrenched in the information around the product and build trust with HCPs, reps can add a new dimension to their interactions.

To facilitate this evolution, companies will need to offer support to their reps through training and coaching as well as using feedback loops on what they know and learn about their customers. Ideally, the omnichannel backbone and AI tools will help empower the reps in their new role. One kind of new tool is helping reps make practice calls with virtual AI customers and then participate in live calls to provide real-time coaching in the moment.

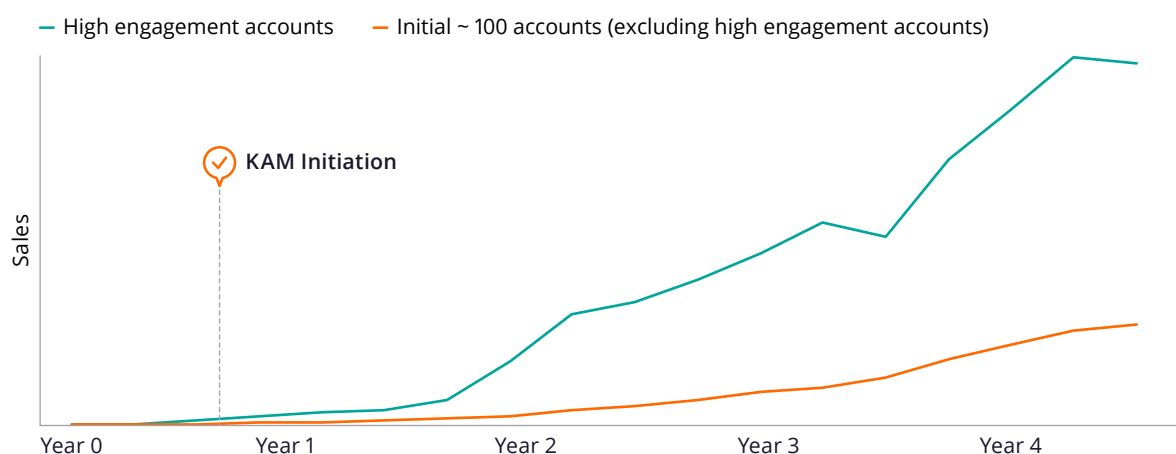
Focusing on engaging institutions

With rising provider consolidation, power dynamics are shifting to organizations rather than individual HCPs. Accordingly, key account management (KAM) has emerged as a strategic priority among 90% of life sciences companies. A ZS survey of integrated delivery network executives found that administrators of health systems reward pharma companies that have effective KAM programs. The majority of health system administrators continue to express a strong interest in partnering with pharma companies across multiple solution categories, such as patient management, care optimization and reimbursement support, rather than having pharma as transactional suppliers. While the results of partnerships can be tremendous, it's important to recognize that building strategic partnerships takes time and extensive effort across multiple teams before indicators of impact can be seen. If these lagging indicators are evaluated too early, then the true value of strategic partnerships may be overlooked.

In a ZS case study (**Figure 4**), we tracked accounts of a client company based on level of engagement. We found that evaluation within the first-year window would have shown minimal results, but after two years, average volume is 5.9 times higher. And after three years, growth continues to expand over lower-engagement accounts.

FIGURE 4

KAM strategy takes time to mature



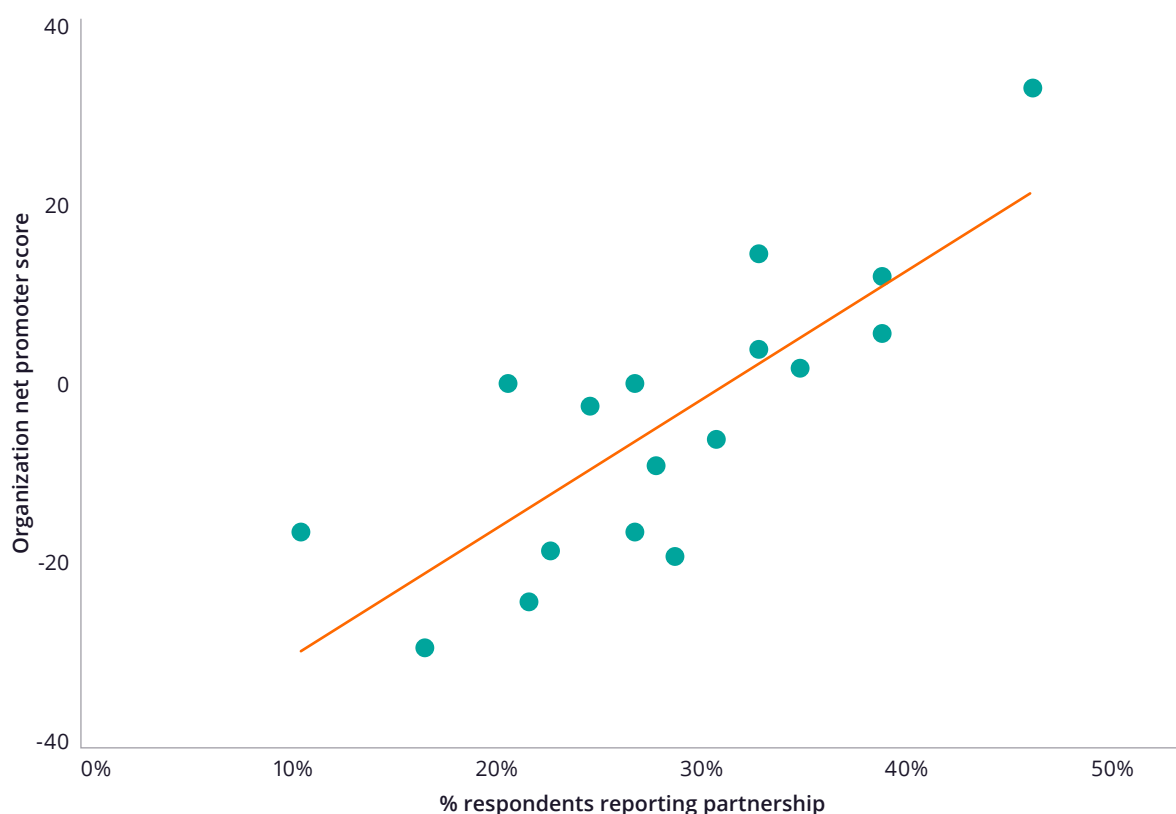
Source: ZS case study

As customer types expand and people change their preferred means of communication, there is an increasing need for customer engagement outside traditional roles and responsibilities. Developing customer strategies focus on finding which roles are best to meet customer needs. Medical affairs teams are expanding their roles at a number of institutions, with nearly 60% of pharma executives saying they are prioritizing field medical excellence as the top nontraditional role. The impact of medical affairs efforts is also evident in key opinion leader (KOL) actions, encouraging nearly 50% of KOLs to share information with colleagues and even switch their treatment or line of therapy following interaction with a medical science liaison. When pharma companies are partnering effectively, health systems show significantly higher net promoter scores.

Figure 5 shows that companies that were considered partners had higher scores, and improved scores have been repeatedly shown to correlate to improved sales performance.

FIGURE 5

The impact of investing in partnerships



For more information, see "IDNs want to partner with life sciences to improve patient outcomes," ZS.com.

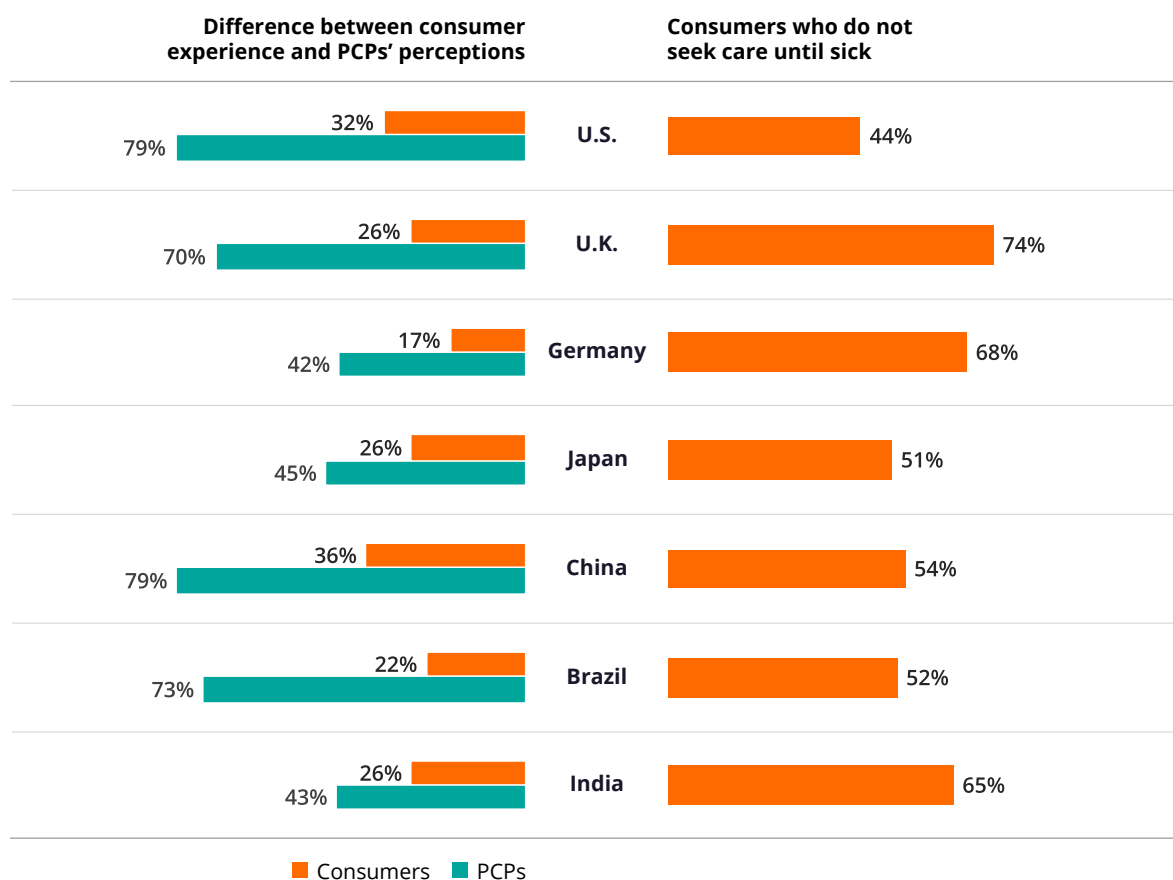
These partnerships have also been shown to drive significant value for the pharma sponsor. One rare disease manufacturer developed diagnostic algorithms, operational care pathways and workflow solutions that resulted in a 143% increase in revenue for targeted health system accounts, compared to the next largest-volume, nonpriority accounts.

New dimensions for patient engagement

A growing number of consumers are making their own decisions around if and how to engage with healthcare, based on what works best for them at an individual level. ZS's [Future of Health](#) research found that a fragmented healthcare experience discourages many patients from engaging or seeking care, which also directly diminishes the commercial potential of pharma products (**Figure 6**).

FIGURE 6

Healthcare consumers experience care as worse than PCPs perceive



Source: "2025 ZS Future of Health Report," ZS.com

Pharma companies have begun to acknowledge patient disengagement and the importance of creating a better patient experience while elevating the quality of engagement. The need to simplify healthcare navigation and elevate patient experience throughout the journey is driving many patient services initiatives.

Leading companies are developing more nuanced roadmaps to cater to unique opportunities to connect, activate, educate and support patients at every stage of complicated patient journeys that require tailored strategies. Among rare disease patients, delayed diagnosis is a key concern that calls for advocating for early diagnosis and supporting genetic testing. In oncology, treatment complexities can be addressed by providing clear information about innovative treatment options and trial openings. Technology can both identify and bridge information gaps for specific patient circumstances, as listed above, delivering personalized information at the right time through the right channel.

For example, one pharma leader has been leveraging an AI-powered data analytics platform to identify top opportunities across patient journeys, creating tailored engagement that improves performance at key inflection points (**Figure 7**). Using ZAIDYN® to create a tailored approach to predict patient needs and reduce discontinuation, a ZS client focused on “last mile” applications, saw improvements across the patient journey and improved patient activation at all steps.

FIGURE 7

Personalization improves engagement



For more information, see “Empowering patient-centric care: Unlocking data to improve patient engagement,” ZS.com.

To reach patients, leading companies are finding success implementing digital front doors because they serve as scalable and accessible entry points for patients, HCPs and other stakeholders to access products, services and information through online portals, mobile apps and telehealth services. These and other patient support programs (PSPs) are an attempt to create a holistic, data-oriented, digitally enabled means of communicating directly with patients. As they are tied to specific diseases or treatments, PSPs can help reduce friction in specific patient journeys, making it easier for people to get on the prescription and then stay on it. When they are implemented, companies are seeing traction with patients they are trying to reach while collecting important data.

Through surveying providers and patients, ZS has found that PSPs are a powerful tool to deliver a patient-centric experience (**Figure 8**).

FIGURE 8

PSPs offer a direct way to engage with patients



Source: "ZS trends report unlocks the future of patient support services," ZS.com

Pharma companies demonstrate varying levels of adopting and integrating patient engagement efforts. There's a rising shift toward being "patient first" and a few leaders focusing on being transformational (that is, innovative, strategic and deeply embedded into the organization's vision). We expect companies to continue to invest in patient strategy and solutions in particular in 2025 and beyond. We are partnering with many in the post-prescription space in particular, where refraction to getting from prescription to fulfillment and staying on therapy are flagged for capacity-building for the future—from strategy to technology.

KEY TAKEAWAYS

- With omnichannel gaining utility and traction, reps should focus on the trust that differentiates them to create a holistic experience and enhances access for other roles and channels.
- Building relationships and partnering with institutions is more important than ever before, companies that successfully partner will see a wide variety of benefits.
- Meet patient expectations by directly providing support through PSPs, digital services and direct contact specific to their patient journey.



Bolstering internal capabilities

Working smarter and more efficiently demands that pharma companies place technological innovation at the top of their priority lists. Tech is no longer a supporting function but a central pillar of future success. But many companies struggle to regularly translate these investments into tangible outcomes and scale progress. We've identified some areas companies should investigate to strike the right balance: proactively managing gross-to-net (GTN), adopting new uses for AI, reimagining marketing and understanding the impact of global capability centers (GCCs).

Controlling gross-to-net dynamics

The success of any product depends on achieving the right access while giving away as little in rebates and discounts as possible. In the U.S., access is increasingly restricted by forces that both encourage high drug prices and demand steep discounts before drugs can reach patients. This gap between gross and net prices, or GTN bubble, has increased by nearly 1.5 times in the last three years, costing industry leaders nearly \$400 billion in 2023, according to UBS's 2024 "Global Pharmaceuticals: U.S. drug formulary position and rebates" report.

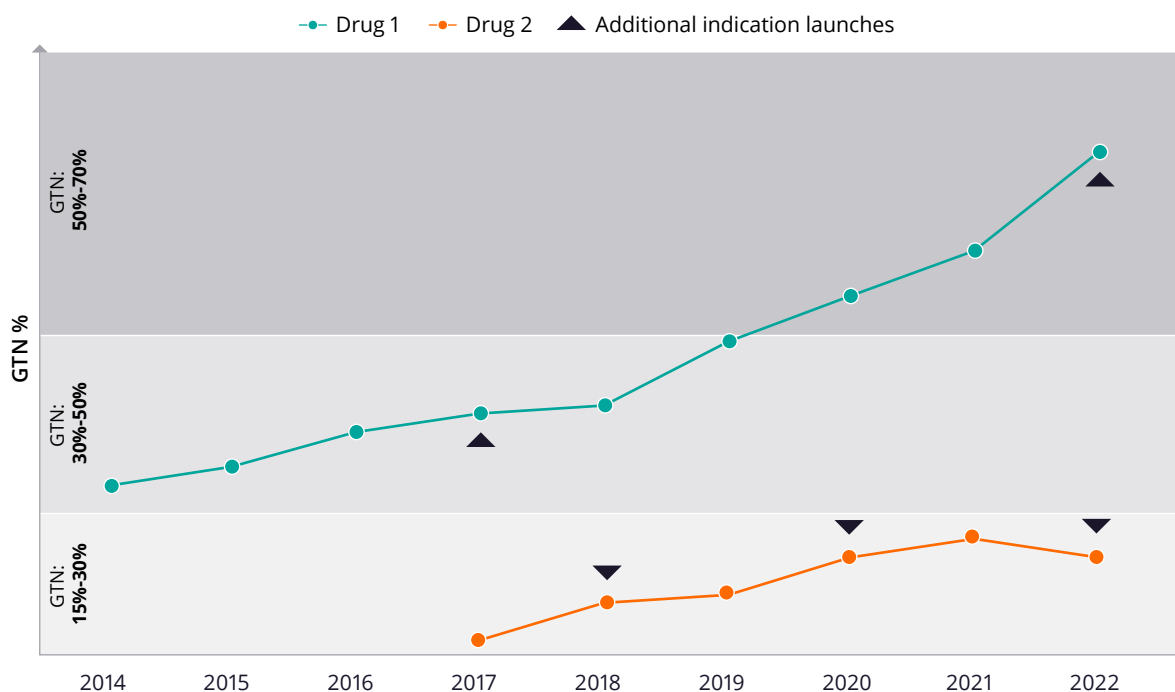
Investments in minimizing GTN can create an outsized impact, so creating a strategy that identifies impact factors can protect a drug's value throughout its lifespan. A ZS study found that certain attributes of the product are most likely to affect GTN dynamics, with some traits determined by the product, like target and route of administration, while others, such as timing of launch and price point, are under a company's control. Some traits increase GTN, such as low expected sales volume or exclusive access versus competitors. Other traits, such as early entry into the market and treating prevalent diseases, decrease it.

Understanding the factors that drive GTN and how much control a company has over the trait can allow companies to create innovative product strategies leveraging factors to maintain low GTN, such as launching in areas with high need.

Figure 9 depicts how companies can maintain a low GTN through properly planning strategic launches to maximize differentiation. "Drug 1" launched with a unique mechanism of action into a crowded field but was unable to maintain meaningful differentiation, while "Drug 2" launched as first in disease, captured significant volume and continued to target innovative indications.

FIGURE 9

A well-planned product strategy maintains low GTN



Source: ZS GTN industry benchmarking study

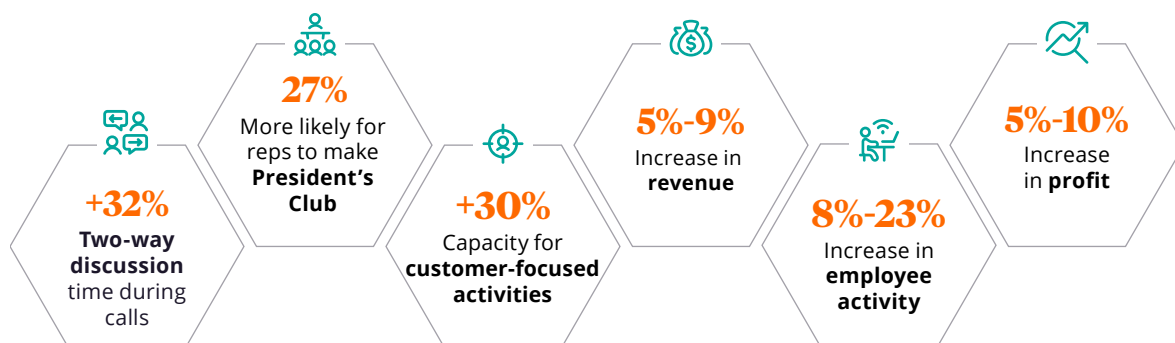
Empowering with AI

ZS research shows no signs of a slowdown in investments in data, digital and AI. In fact, companies are planning to dial up their spending in these areas for 2025, with 93% anticipating an increase in investments (up from 88% the prior year) with commercial identified as a top area of investment.

A critical focus area for pharma has been sales force effectiveness (SFE). With AI, we can now deliver scalable, AI-powered SFE capabilities that automate workflows, compress time to delivery and reduce costs over time, effectively allowing companies to multiply their field force resourcing without adding reps. Such tools empower field reps with AI, providing them with their own on-demand AI analyst, coach and assistant, allowing them to focus on even more impactful customer interactions. For example, a pharma leader has created an AI-powered solution for sales reps to refine conversational skills via a virtual sales rep training simulator. Engagement and insight tools are now integrating AI tips on how to best improve messages to deliver an enhanced customer strategy, focus on key information and build trust (**Figure 10**).

FIGURE 10

AI boosts field effectiveness initiatives



Source: "AI-enabled effectiveness: A 4x field force multiplier," ZS.com

Agentic apps will continue to bring AI to key moments and solutions to human workflows. We believe the most scalable and impactful changes will string together those points into a seamless workflow that changes the way we work in a way that reduces the burden and effort of the individual to engage.

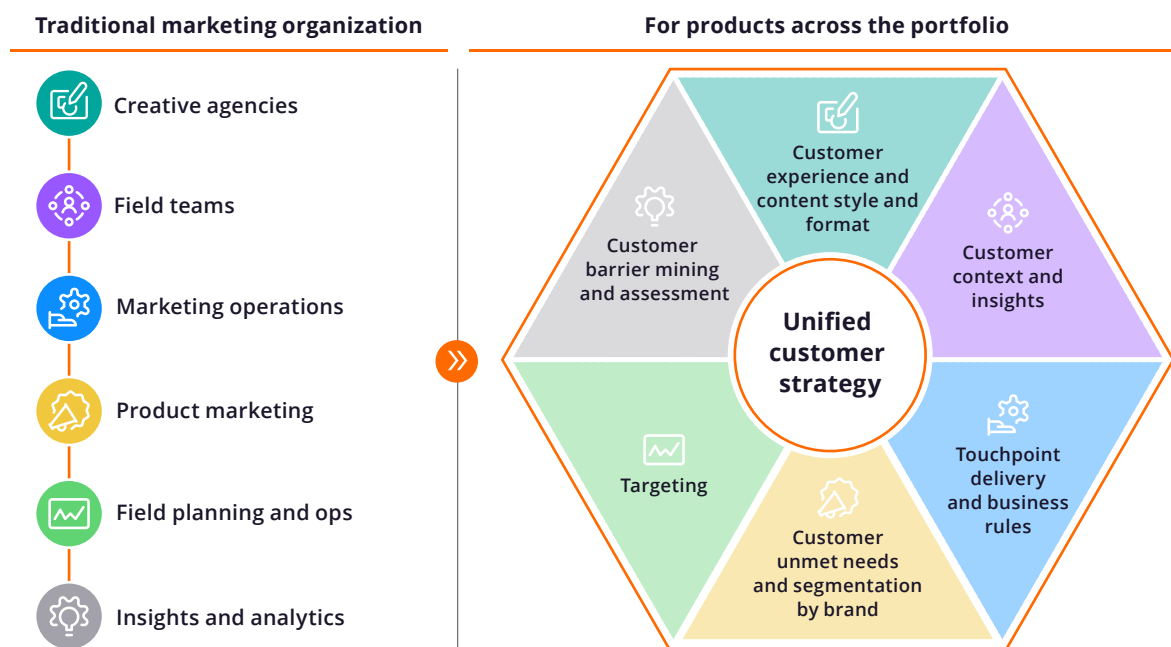
Reimagining marketing across the portfolio

The evolution of marketing has only just started in pharma organizations. Many organizations have been taking steps toward more modern marketing training. But we see a greater change, with some companies shifting from a features-and-benefits orientation to a customer-led strategy.

To drive personalization at scale, pharma companies must take a context-driven and unified view of the customer. When we center around the customer instead of our brands, for example, we can engage in a cross-portfolio view of a customer and move the mindset from brand planning to holistic customer strategy (Figure 11).

FIGURE 11

A unified customer strategy brings strengths together



Leading pharma companies will be able to use this centralized knowledge to set individual, context-driven customer strategy and planning across all products, functions and teams. Many other markets focus on “how” to buy, making access to their products seamless and easy, but the complexity of healthcare systems puts barriers in place that holds pharma companies back. By reinventing marketing, companies can show that the product’s “why” is compelling enough to acquire, combined with new content focused on “how to buy” that meets customers’ needs. This is not a small change that can be added to regular updates and training; instead, it requires marketing to step forward into new roles.

In 2024, we saw many organizations make a start in this direction, and we expect this trend to continue. Along the way, there’s still much to discern about connecting brand strategy to omnichannel execution and where this function should reside in an organization. Finding and training the right talent is an issue, too, as is growing the capabilities to use the data more effectively.

Doubling down on global capability centers

At a time when pharma companies are under cost pressure, establishing a capability center has become an attractive model to gain efficiencies and reduce external spend. Although pharma was slower to pick up this strategy compared to other sectors, adoption has accelerated in recent years. Currently, 80% of the top 20 pharmaceutical companies have established GCCs, with India increasingly becoming a central hub. During the past decade, GCCs in India have expanded approximately fourfold through new setups and expansions, with headcount growth accelerating by about 2.5 times in the last five years, according to a ZS benchmarking study. Our recent benchmark study found that, within commercial services, the majority (that is, more than 70%) of GCCs are scaling their in-house teams to deliver subfunctions, such as competitive intelligence and analytics, marketing and sales operations.

Although GCCs have been instrumental in advancing pharma practices, they are now facing challenges like maintaining top talent and ensuring efficient and scalable operations. ZS has been helping clients navigate through these challenges by setting up and scaling GCC operations, building and transitioning new capabilities and providing staff augmentation.

To enhance the success and impact of GCCs, successful commercial leaders have followed practices such as:

- Creating a flexible talent ecosystem with strong hiring and onboarding practices
- Institutionalizing knowledge through a tech-first approach
- Building an efficient operating model with clearly defined processes
- Setting up as “tech first, people-enabled” rather than a “people-led” organization to improve productivity and support scale

KEY TAKEAWAYS

- Creating a GTN strategy at launch can help companies take advantage of controllable factors to improve drug lifetime revenue and maximize differentiation.
- Leveraging AI can improve internal functions, such as sales force effectiveness and customer relationship management.
- Marketing must shift to a customer-centric organization and enact a holistic customer strategy to reach across company portfolios and enable success.
- To truly enable success, pharma must identify the right GCC model to fit their needs and establish clear success factors to measure progress.
- A solid approach to change management is needed to ensure successful transformation in all of these areas.

A man in a suit is shown in profile, looking towards the right. The background is a light blue overlay featuring various financial data visualizations, including bar charts, line graphs, and percentage values like -7.65%, -4.89%, -1.35%, -1.43%, -4.25%, and -1.72%.

Where do we go from here?

In 2025, we are continuing to feel the pressure to do things differently. While we evaluate the implications of shifting political and policy proposals and actions, there's no slowdown to the reality that many companies need to lower selling, general and administrative expenses while improving effectiveness and competitiveness to meet customers where they are and meet shareholder expectations. Here are a few areas we think companies should be tackling next in this evolving landscape.

Restrategizing the commercialization of mature brands

Commercial leaders are faced with an increasing number of trade-offs in how to resource a growing number of launch brands, continue to accelerate share in their inline portfolio, consider active business development and reduce spend. Too often the answer is to focus on inline brands or “peanut butter” (thinly spread) resourcing, which often results in not giving enough to launch (this is in part why we are where we are regarding market shaping). There is momentum in how we have always done things. And while we need to radically re-evaluate the way we do each launch, balancing sophistication and scale, there is also an opportunity if we can challenge the moment of spend with mature brands.

Forward-thinking companies are engaging in a progressive conversation about moving mature brands earlier to a highly or fully digital approach sooner than we have historically seen at loss of exclusivity. This frees up finances and on-the-ground resourcing to support launch and growth brands.

Some companies are also re-evaluating how AI can rework the spend in marketing and content development. Do we really need agency-led campaigns post-launch, or can AI generation be effective and help us move from once a year to more on-demand, based on customer needs? These changes face considerable inertia in the face of how we have done things commercially. But those who are evaluating the art of the possible today will be better poised for effectiveness in the coming years of successive smaller launches.

Context matters

While some companies are evolving toward more customer-centered marketing approaches and structures, we have work to do to get to know our customers better. Today we spend most of our time collecting information that centers around what they did—affinities, engagement, prescribing and so on. This information is valuable, but to create behavior-changing personalized customer engagement at scale, we need to get deeper into why customers do what they do. When we uncover why, we can better understand how to be relevant to them in each engagement. That's where **CONTEXT** (which stands for customer insights, observations, needs, trends, environment, experience and touch points) comes in (**Figure 12**).

FIGURE 12

The CONTEXT wheel provides a holistic idea of the customer's state



Source: "From patient outcomes to business results, CONTEXT matters for pharma," ZS.com

As companies continue to experiment with gen AI, 77% say they've either already adjusted or plan to overhaul their data strategies. CONTEXT needs to be a key part of this future. Our knowledge about customers needs to be a living system of information—one that is comprised of second- and third-party data and market research, but also direct and pointed first-party data. When we collect across our functions, connect the data around the customer, enrich it by deriving new analyses and attributes that scale and democratize this data back out to the organization compliantly, we are creating a CONTEXT stream that changes our approach to organizational knowledge, learning and execution. It is the foundation for both data differentiation and the execution of the commercial model of the future, which we estimate can drive up to about 10%-15% incremental revenue while also saving around 10%-12% in selling, general and administrative expenses.

In 2024, the proliferative action toward this future was the introduction of field feedback loops to capture what's in the heads of customer-facing personnel about our customers. We have more knowledge than we think that directs us to a different future. In 2025, the way we think about customer data evolves, including how it can be used to identify and drive relevant customer engagements that help them advance past their barriers.

CRM: A moment of challenge or serendipity

The impending split of Salesforce and Veeva has created a moment where organizations are actively evaluating the path forward for their customer relationship management (CRM) systems. We see this as a moment of serendipity to create what has traditionally been an infrastructure element—a system of record—into a foundational vehicle for the commercial model change we seek. If business leaders lean into the opportunity with their technology partners, we will see CRM become an ecosystem that includes a system of context, a system of intelligence and a system of activation that can bring to life the how for the industry. ZS is actively envisioning this shift for and with biopharma for the future.

KEY TAKEAWAYS

- While there are many trends to watch, we expect some overcoming of spend inertia and commercial mix for more mature brands across the industry, leveraging a digital-first mindset.
- CONTEXT matters. Knowing **what** our customers do lets us serve them based on affinity. But knowing **why** lets us meet them where they are with relevance to overcome their barriers. If we brought the collective knowledge of our functions together and sought the context we need more proactively with first-party data, companies could create truly differentiated data and actions.
- The CRM moment is a chance for technology and business leaders to come together and reinvent our commercial model future in a way we cannot without technology and reimagined workflows.

The future calls for a go-to-market pharma model centered around broad experiences, enabled by data and built on trust. Clear change management practices are going to be critical to ensure that changes are steps in a new direction, rather than gradual changes that lose impact. Through clear, strategic change, industry leaders will be able to achieve behavior-changing, personalized customer engagement at scale, across enterprises and with modern tools that provide insights at an individual level.

By thinking strategically now, we can recognize the unique circumstances of pharma companies and their customers to identify the correct direction to move in. By creating meaningful change, we can deliver better drugs and a patient-centered healthcare system. ZS is ready to accompany pharma companies on that journey.



About the authors



Maria Whitman is managing partner of global commercialization strategy and solutions across industries at ZS. She oversees the practice areas that guide ZS's clients in optimizing their commercial and operating models, driving innovation, strategy and value. Maria previously led ZS's global biopharma industry practice.



Joe Stevens is a principal at ZS who leads the healthcare ecosystems practice area. He focuses on helping pharmaceutical clients develop strategies to communicate innovative product value, set prices that balance financial return with patient access and develop impactful programs and services for both payers and large provider organizations.



Todd Burgess is a manager within ZS's healthcare ecosystems practice, focusing on supporting key account teams to become trusted advisers to their most important healthcare organization customers. A key account enablement expert within the life sciences industry, Todd's focus is on developing the strategic alignment between manufacturers and key accounts.



Colleen Stubbs is a consultant working on strategy across functions at ZS. With a background in academic life sciences research in genetics and mRNA, she is mostly focused on R&D-related efforts and branches into other areas as a subject matter expert to communicate big ideas.



Ayushi Sahastrabudhe is an associate consultant experienced in business research and strategy and competitive intelligence. She has expertise in market mapping, industry trend analysis and supporting business development activities, and she has been instrumental in building thought leadership points of view.



About ZS

ZS is a management consulting and technology firm that partners with companies to improve life and how we live it. We transform ideas into impact by bringing together data, science, technology and human ingenuity to deliver better outcomes for all. Founded in 1983, ZS has more than 13,000 employees in over 35 offices worldwide.

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