*im*patient

LAUNCH: RELAUNCHED

The rise of real-time market intelligence

JULY 2025

Contents

This whitepaper provides a call to action for how AI-driven insights can transform product launches in the pharmaceutical industry. It is based on the views of senior pharma executives who took part in a range of Impatient Health research activities.

We are grateful to all partners and research participants for making this happen.

Foreword

Pharma launches today are a tragic waste of ambition. We drown in dashboards, yet are often blind to what matters. We pretend to have command of the field, but when the data finally trickles through, it's already too late to act. We craft ornate strategies, build timelines that look impressive and proudly declare ourselves 'launch-ready.'

But as Mike Tyson once said, "Everyone has a plan until they get punched in the mouth."

The punches are inevitable. This whitepaper is about what happens after the punch: Do you go down for the count, or do you have the ability to adapt?

Introducing the concept of a Launch GPS: an adaptable navigation system that keeps you on course even when the first route gets blocked. And it does so quickly.

This isn't just another layer of process; it's a way to stop guessing. The Launch GPS isn't a new idea so much as a long-overdue correction. Think of it as a vital upgrade to how we drive – one you won't imagine living without once it's in place – and an end to blind hope-as-strategy. Read it, argue with it, but don't ignore it. Because we need to make sure launches work, for the sake of pharma and for patients everywhere.

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All contributors are expressing their own opinions and not necessarily those of their companies.

Executive summary

Drug launches are incredibly unpredictable operations. Even those who work on them full-time struggle to gain a clear enough picture to make accurate decisions. In fact, many decisions made by senior managers at launch are often ill-informed and, seemingly, random. Some suspect that the time and effort that is put into seemingly immaculate launch plans has been largely wasted work for years.

Here, we reveal that it's more than a suspicion: the decision-makers themselves confirm it.

Impatient Health conducted a series of interviews, webinars and workshops with senior pharma executives from brands across the industry. They reported a variation on the same conclusion: that key decisions at launch are based on out-of-date, unstructured data that is often unreliable and badly presented. This means it is incredibly difficult to conduct strategic operations that have the ROI or time that we would like.

This wouldn't be so frustrating if it were impossible, but we already harvest rich market data in a timely manner, are already able to use that data to address very specific research requests, and we know that commercial leaders in other industries can leverage similar market intel. Fed up with trying to navigate the road ahead by looking in the rearview mirror, the executives we spoke to said they want something akin to a Launch GPS: an AI-powered tool that processes and then directs a diverse range of cross-functional field insights in real time.

This whitepaper shows how commercial leaders can install that Launch GPS. It unpacks the insights gleaned from Impatient's research, exposes the critical strategic problems felt by managers across the industry and explains how Launch GPS systems are not just the solution to these perennial pain points, but the future of drug launches in general. Commercial managers are on the precipice of getting everything they ever wanted. Keep reading to find out how to get it.

"We have tons of insights from literally hundreds of HCPs and KOLs… but the way we process them and come to the next best action—that's where we struggle."

LUCA DEZZANI
VP US MEDICAL AFFAIRS
BIONTECH

INTRODUCING: THE LAUNCH GPS

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The Launch GPS operates similarly to a car's navigation system. The destination is set, but the route changes in real time as unpredictable obstacles come to light.

The interface provides live information and updates the route as needed, while the driver remains in control of the wheel and has the ultimate say on which route to take. As new data becomes available, the system recalculates, helping avoid delays in reaching the destination.

Our research found that commercial managers are missing this kind of tool at launch: a bridge between market intel and informed strategy. This tool will enable commercial leaders to make better, more dynamic decisions in response to changing conditions. They can allocate resources accordingly, helping them meet short-term goals without losing sight of long-term objectives, and even pivot entirely when customer signals suggest they should.

The Launch GPS doesn't just draw on commercial-specific data, but incorporates information from across the organisation. Therapeutic area trends, claims data, HCP behaviours, social media signals, publicly available information and competitor intel are all digested by the AI. Much of this data is already collected and can be pre-loaded into the system, establishing a robust view of market intelligence and a mechanism for real-time refinements. Unlike our current systems (which grow increasingly useless the more we feed them, until they are clogged with data we don't have the capacity to process), this one only gets more intelligent the more it's fed (see Figure 1).

"We have kind of information overload... What we haven't yet quite figured out... is how do we centralize those in a way that we can assess them effectively, as opposed to just having an overwhelming number of insights coming in from all angles."
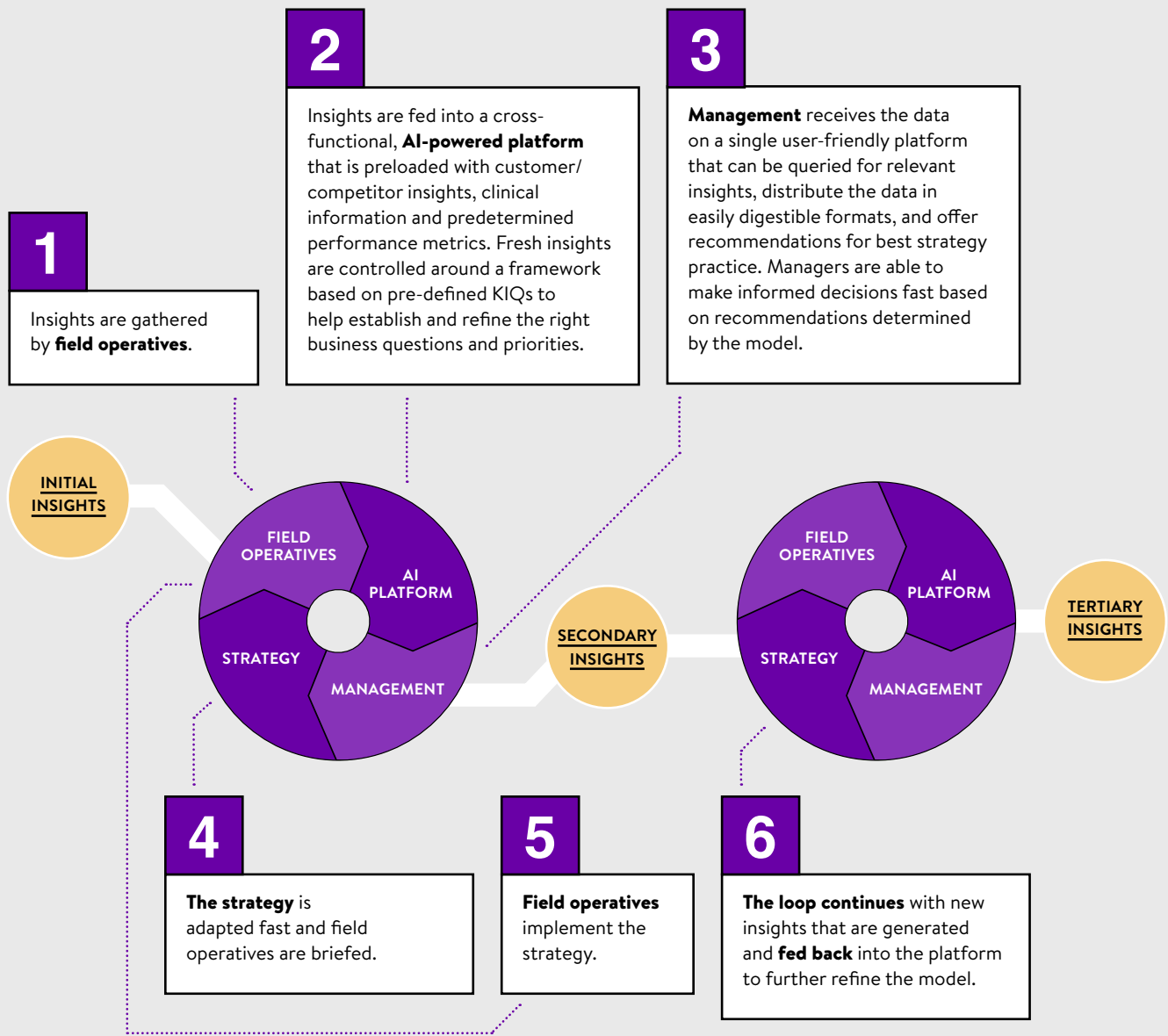
KIERAN DAVEY
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FIGURE 1

1 Insights are gathered by **field operatives**.

2 Insights are fed into a cross-functional, **AI-powered platform** that is preloaded with customer/competitor insights, clinical information and predetermined performance metrics. Fresh insights are controlled around a framework based on pre-defined KIQs to help establish and refine the right business questions and priorities.

3 **Management** receives the data on a single user-friendly platform that can be queried for relevant insights, distribute the data in easily digestible formats, and offer recommendations for best strategy practice. Managers are able to make informed decisions fast based on recommendations determined by the model.

4 **The strategy** is adapted fast and field operatives are briefed.

5 **Field operatives** implement the strategy.

6 **The loop continues** with new insights that are generated and **fed back** into the platform to further refine the model.

INITIAL INSIGHTS

FIELD OPERATIVES — AI PLATFORM — MANAGEMENT — STRATEGY

SECONDARY INSIGHTS

TERTIARY INSIGHTS

[1] Deloitte. (2023). "DataOps and MLOps in Life Sciences: Measuring the Impact." Deloitte Digital. Bain & Company. (2024). "The Pharmaceutical Innovation Imperative: Cross-Functional Data Integration." Bain Insights

The cross-functional nature of this model isn't just an add-on, it's a key element of the power of this model. Our research backs up other studies[1] that show how the alignment of medical and commercial data is essential to improving the success of future launches. The Launch GPS doesn't narrow its view to the laser-focus of commercial perspectives, but is able to take on all the complex nuance that is part and parcel of selling medicines. It can convert data that would otherwise be out of reach to commercial teams into intelligence that is of benefit to commercial strategists. This is a truly cross-functional program that works right along the product lifecycle in a self-perpetuating loop (see Figure 2).

"Sometimes HCPs cannot be accessed from a commercial standpoint. We need to rely on our medical associates to get things moving. That's just one part of why medical and commercial need to work together—and why insights themselves are not really valuable unless they are put into a context from which we can derive action (in a compliant manner)."
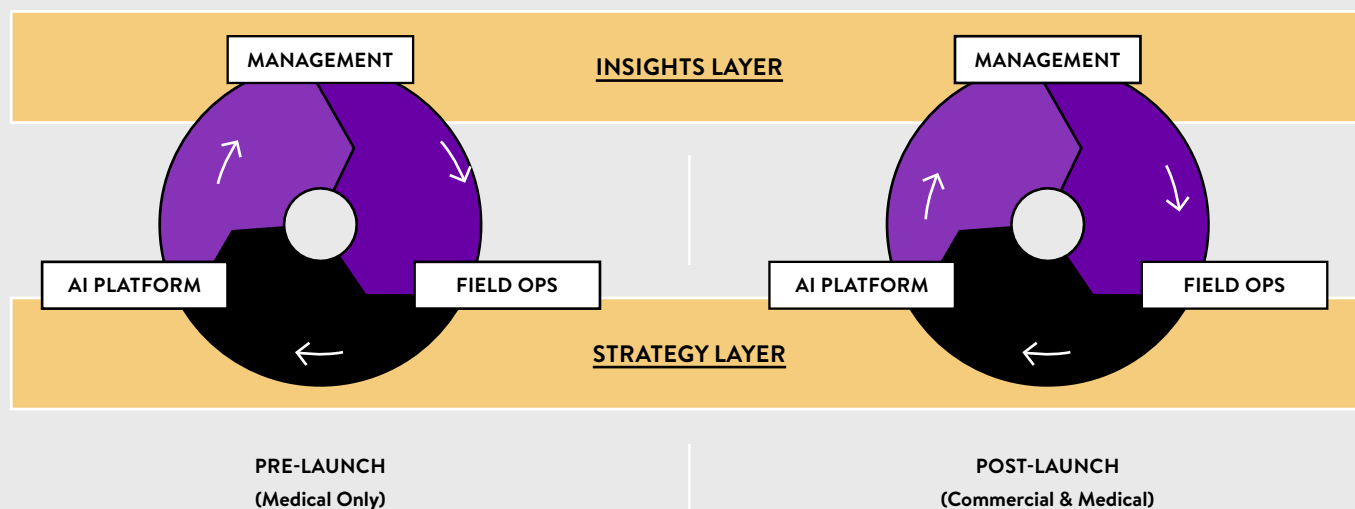
JUSTIN MOLAVI
DIRECTOR, COMMERCIAL
STRATEGY AND INSIGHTS,
GENENTECH

FIGURE 2

INSIGHTS LAYER

MANAGEMENT

AI PLATFORM   FIELD OPS

STRATEGY LAYER

PRE-LAUNCH
(Medical Only)

POST-LAUNCH
(Commercial & Medical)

The insights sit on the top layer, integrating a diverse range of insights from all departments operating in the field, which then percolate down to management, which makes informed, strategic decisions based on model recommendations. Those decisions are implemented by the field operatives, who contribute further insights into the system, which gets fed back to management, and the loop begins again.

Once this virtuous circle starts spinning, we are able to ask better questions and generate more launch-relevant insights throughout the product cycle without waiting two years out from launch to start drafting launch plans. This means that the insights we gather get richer as the program better understands the field context, helping us acquire the data we never knew we needed— the 'known unknowns' as well as the 'unknown unknowns'. Furthermore, because this system is cross-functional from the offset, commercial teams can influence data structure and insights collection at an earlier stage, meaning that when it comes to launch planning, they're already two steps ahead.

A tool of this kind is a major upgrade on the insight processes we're used to (which often come down to little more than glorified spreadsheets, or even just spreadsheets), but it's worth emphasising that installing the Launch GPS into our current systems won't automatically achieve insight elysium overnight. If we are going to use this capability as a strategic asset across the product lifecycle, it has to be located within a governance structure that maximises its potential and places it at the heart of our insight operations. To understand why, we must examine the problems we currently come across when we're strategising for launch.

WHY DO LAUNCHES LOSE THEIR WAY?

"...pharma has evolved into this position where it is so process-driven that people are going through the motions, getting through to the next meeting. They're not asking questions of their data or their strategy nearly effectively enough."

INDEPENDENT CONSULTANT
AND FORMER CEO
SMALL PHARMA COMPANY

According to our research, pharma doesn't actually do launch strategies. At least, not as any other industry would recognise it. Of course, we set timelines, silo functions and determine launch plans years in advance. However, other industries are much more agile and adaptive.

Launches in retail or tech recognise the fast-moving and often unpredictable nature of their markets, harnessing data and customer insights to perfect and tailor processes to optimise inventories, personalise marketing and improve customer experience on the fly. In the automotive sector, manufacturers constantly monitor user behaviour, buying patterns and consumer feedback so that they can quickly improve their marketing and design of new products, as well as pivoting on things like software design and product recalls. In financial services—an industry almost as heavily regulated as pharma—vast quantities of data from customer transactions and economic indicators are processed to update product offerings, and are leveraged for mortgage approvals and risk management strategies.

If other industries are already able to bridge the gap between insight and strategy, why can't pharma? It's worth emphasising that this is not a problem with data collection and surface knowledge. Our research suggests that while information and insights often arrive late or are difficult to access for harder to reach populations, current research capabilities can meet most specific research needs. The problems don't come with dealing with research requests, but with collating them into something that informs strategy as a whole. In other words, it's the difference between seeing the trees and seeing the forest.

Figure 3 illustrates four broad categories of insight that currently feed into pharma's launch strategy. Each category of insight is valuable in its own right, even if they also come with their own challenges, but without being collated into a broader, bigger picture strategy, they are of limited use as individual pieces of data.

FIGURE 3

How pharma uses insights

AREA ▶	REQUIREMENTS ▶	CHALLENGES
Competitor and market intelligence	• Tracking competitors' scientific data and marketing activity • Insurance claims/script data, sales forecasting	• Claims data is expensive even for large pharma and completely out of reach for small pharma • Limited insight available on competitor strategy
Patient insights	• Patient journeys and ethnographies, segmentations, treatment preferences • Lifestyle factors affecting adherence, understanding burden of disease • RWE and QOL data, HEOR	• Challenge to achieve true depth on patient journeys across different markets • Hard to reach populations often not included • Data from registries is expensive for small/medium companies • Global studies lack country specificity
Customer insights	• HCP behaviour: segmentations, treatment preferences, patient understanding • Influencer mapping, diagnosis pathways, treatment formulas • Message and narrative testing	• Global segmentation often not nuanced enough for local countries • Typically based on reported, rather than observed, behaviour - so not granular or actionable
Performance metrics	• Primary metrics: sales tracking against forecast • Secondary metrics: campaign data (click-through rates, advertising metric) and adoption ladder metrics (e.g., age of target treaters reached, converted etc.)	• Collecting real impact data is prohibitively expensive • Platforms/channels often dictate the metrics • Attribution challenges

"We're being asked to show how insights impact business decisions... That means defining leading and lagging indicators—even if they're not tied to drug sales."

JUSTIN MOLAVI

DIRECTOR, COMMERCIAL

STRATEGY AND INSIGHTS,

GENENTECH

One major reason why the forest is so hard to see for the trees is the idiosyncrasies of the pharma launch cycle (something that other industries don't have to contend with). The way that field access works means that data and insights aren't given priority when the strategy is being defined. A poll of Impatient webinar attendees on this topic had only 12% describe their organisation's use of insights to refine launch execution as 'advanced'. Clearly, there is a general feeling that we are unable to unleash the full power of the insights we generate.

This is an opinion that was further confirmed by the commercial leaders we spoke to, who identified various challenges in filling specific gaps in data and insights (those described in Figure 3). However, they also emphasised that it's not specific insight challenges that are preventing a broader, more ambitious insight-led strategy from being developed. Rather, the problems are much more fundamental and structural.

We identified five fundamental structural challenges that are hindering launch.

1

A lack of early integration

We found that collaboration between medical and commercial is critical to effective launch,[2] and other evidence backs this up.[3] But the reality is that systematic cross-functional integration on data and insights is often absent or takes place too late in the day. Medical teams have the data and insights to supply commercial colleagues, but those insights are often insufficient. In our research, commercial leaders described the frustration of trying to integrate insights generated for different purposes or trying to use data collected for medical's purpose that miss key nuances. Insights collected by commercial teams are often too late to fully drive strategy—they can only tweak strategy at the margins.

"typically we only put the pieces of the jigsaw together at the end and find that a patient insight contradicts an HCP or payer insight as they've been collected for different reasons… so we find that we just have lots of pieces from different puzzles"

VP MARKETING
MEDIUM-SIZED PHARMA COMPANY

WHAT NEEDS TO HAPPEN?

Design and implement a fully integrated, cross-functional insights programme, tied to strategies for each indication. Research participants described early attempts to do this through anchoring a consistent set of critical business questions or Key Intelligence Questions (KIQs) at a cross-functional level, which has been shown to reduce time-to-market by 25%.[4]

[2] In a live poll during the Impatient Health webinar Insights: Rocket Fuel for Launch, attendees were asked: "How important is medical-commercial collaboration to effective launch?"; 70% selected essential and 27% selected very important.

[3] Boston Consulting Group. (2023). "The Future of Integrate Evidence Planning in Biopharma." BCG Henderson Institute. Pfizer-commissioned study by IQVIA. (2023). "Evidence Planning and Market Access: Quantifying the Value of Integration." Pharmaceutical Executive.

[4] Pfizer-commissioned study by IQVIA. (2023). "Evidence Planning and Market Access: Quantifying the Value of Integration." Pharmaceutical Executive

2

Inadequate data management

Current solutions for managing myriad different data sources don't help pinpoint the right insights: research by McKinsey found that 60% of pharma executives face challenges managing data across different functions and sources.[5] So even when there is early integration across medical and commercial, research participants described locating the right data and insights as difficult and time consuming. This leads to data and insights not being used effectively: work is duplicated, teams suffer from analysis paralysis, or it's simply the case that the loudest voice is heard.

[5] McKinsey & Company. (2023). "The Pharmaceutical Analytics Revolution: Breaking down data silos." McKinsey Digital

"I don't know of a tool that effectively manages insights from lots of different data sources. We still just use a huge Excel spreadsheet and rely on analysts to sift the story"

COMMERCIAL INSIGHTS LEAD
LARGE PHARMA COMPANY

WHAT NEEDS TO HAPPEN?

The industry is looking for a single place to store and interact with multiple data sources of different types, collected by different teams. The solution also needs to help distinguish between what is simply a quirk in the data and what is an insight that should be acted upon.

3

Rigid strategies

Developing strategies within pharma is an arduous process—multiple long workshops, endless iterations, hundreds of slides. Once we're settled on our strategy, confirmation bias can kick in. Amongst our webinar attendees, only just over a third (37%) reported that changes in strategy happened in more than half of launches. The commercial leaders that took part in our research and workshop shared examples of data gathered to validate existing strategic positioning and reluctance to entertain insights that pose an alternative position.

"The way we launch, and set budgets…it's hard to shift strategy. So much goes into the brand plan, and the lead in time to execute things can be so long, it feels like several steps backwards to make any significant changes to strategy"

VP MARKETING
MEDIUM-SIZED PHARMA COMPANY

WHAT NEEDS TO HAPPEN?

A streamlining of strategy and trimming of the people involved is long overdue. We all know that annual plans are often out of date by the time they're being executed, so we need to move to a leaner, more iterative process that enables and incentivises strategic agility. Better governance and some enabling tech will both need to play a role here.

4

A gap in critical skills

Most organisations don't have the expertise across the company to properly harness the value of data and insights. Two specific skills gaps were described by commercial leaders as harming launch: deriving relevant insights from data; and ensuring that a strategy actually utilises those insights. There are two skill sets that are often neglected in the rush to focus on data gathering and compiling all-encompassing strategy documents.

WHAT NEEDS TO HAPPEN?

Provide the right skills or bring in the right people. One way to do this is to ensure strategy is a core part of brand leadership job descriptions and training. But also create new roles that are cross-functional and take on accountability for managing the broader insights ecosystem and its relationship with a more agile approach to strategy.

5

A rinse and repeat mindset

All the previous challenges reinforce a mindset that looks for inspiration only in what's gone before. Strategies follow a tried and trusted (not tested) formula that makes it difficult for insights to really show their true value and inspire a new approach.

WHAT NEEDS TO HAPPEN?

A revolution in our approach to launch strategy in order to actually benefit from a Launch GPS. To make this happen, we need to provide the vision of a better way, and the perseverance to embed the right governance and technical systems to deliver this future (we'll show you what this looks like in the next section).

"The structure we have creates and then cements the mindset, and the systems are a product of that. So we have these silos. I guess it needs ripping up to be honest, but where's the incentive to do that?"

VP MARKETING
MEDIUM-SIZED PHARMA COMPANY

THE LAUNCH OF THE FUTURE

The future vision that commercial teams are looking for is rapidly becoming more possible with the available technology.

The suite of tools driving insights products provides a credible technological solution to this challenge by establishing consistency in data management and insight generation across organisations, with AI-driven analytics layered on top to quickly generate initial insights for analysts and strategists to work with.

"What would improve [launch effectiveness] the most? Something all-encompassing, that puts all our data in one place, and pulls out real time insights that can support our strategic objectives…I know AI is moving fast but that seems a few years off yet."

VP BRAND MARKETING

LARGE PHARMA COMPANY

But despite this AI-insights arms race, tools are not being systematically adopted, and when they are, the impact is rarely seen. This is because, while technology is the key enabler in a new launch strategy, it isn't sufficient on its own. Without changes to structure and governance that can provide the right inputs and act on the outputs, the potential of a Launch GPS will not be realised.

Three steps to install your GPS effectively

Based on the wishlists for transforming the launch strategy of commercial leaders that took part in our research, we recommend three core steps to establish a more effective cross-functional insights ecosystem.

STEP 1

Build an insights governance structure

Setting up a cross-functional framework around insights doesn't demand an overhaul of our entire launch structure, but it does require us to take a more nimble footing around our launch operations and to require cross-functional collaboration throughout. Building new governance is already starting in some companies. The commercial leaders interviewed in our research study described the development of an approach that prioritises the use of a guiding framework tailored to each launch. This is based on predefined critical business questions that are cross-functional to make sure that all data collection and analysis is supporting cross-functional objectives, and help validate and prioritise the most relevant insights. This framework needs to be flexible enough to also identify insights that might challenge and refine the overall strategy.

STEP 2

A collaboration mindset to gather timely insights

We've been aware of the opportunity represented by medical teams for many years—but we are yet to fully realise these teams as genuine strategic assets. Repurposing the medical function as gatherers of key strategic intelligence is an opportunity to stimulate this change, allowing them to power the launch with new intelligence before commercial teams actively enter the field.

Medical gets the engines spinning early, establishing audience and product understanding from the pre-launch phase right through to maturity. Their active educational role helps stimulate conversation and messaging around the product. Commercial teams need to also feed into this data collection, making sure that insights generated have some relevance for their needs later down the line too. This fresh information is loaded into the Launch GPS, helping set the right direction and establish an understanding and perception of the product across the market before approval.

> "Launch isn't just a commercial activity, it's one that needs to include the whole company. Of course commercial will execute it, but they'll execute better if it's been driven cross-functionally for many years."

HEAD OF LAUNCH EXCELLENCE
LARGE PHARMA COMPANY

"The technology doesn't care if the data came from Medical or Commercial. It doesn't care about our org chart. That neutrality can help us break barriers."

LANCE HILL

CEO

WITHIN3

STEP 3

Feed your Launch GPS

To work effectively, your Launch GPS needs your data and needs to know your destination. As well as medical insights, which are integrated and processed as these teams conduct their field operations, the program is pre-loaded with other critical datasets (or access to the relevant external sources), integrating a wide variety of data from PMR, message testing, competitor intelligence and RWE. But because the 'destination' for each launch is different, the GPS also needs a bespoke guiding framework, tailored to your strategic goal, with specific business questions or KIQs to validate and prioritise the most relevant insights.

With these two inputs provided, the GPS can identify insights that suggest how best to refine and execute strategy. Behind the platform interface sits a team of consultants on hand to support managers with the interpretation of the data or interrogation of any suggested strategic pivots.

These three changes require us to rethink our priorities across the product lifecycle. Of course, we can't change the regulations—medical still won't be able to sell and commercial won't be able to enter the field until approval—but by turning medical into a key pillar for the generation of cross-functionally relevant insights, we can train the Launch GPS to guide commercial teams with the best available insights as soon as they enter the stage. Medical must lead on insight strategy pre-launch, but with commercial involvement; the Launch GPS provides the glue between their operations and commercial later in the product lifecycle.

The Launch GPS in action

Medical teams may have different goals to commercial, but they still face major strategic challenges. Insights are important for these teams—acting quickly can be crucial, sometimes even life-saving, for patients. Yet, like their commercial counterparts, medical teams often struggle to act nimbly in response to incoming data.

We spoke to one large pharma medical manager who was trying to understand why a chronic disease treatment had a slow adoption, despite strong clinical results. Like others in his position, he recognised that part of the problem was inefficient and siloed insight programs that failed to process actionable insights in a timely manner.

By using an integrated insights platform—a Launch GPS—he was able to feed in field reports, clinical trial data, advisory boards and conversations—a quantity of data that would have taken months for a human team to sift through. The platform was able to generate three real-time actionable recommendations fast, in this instance:

1   There was a serious awareness gap. 22% of healthcare providers were found to be unaware of the therapy's benefits. It was recognised that a lack of in-person events was partly to blame for this. Existing events could be prioritised and new ones organised.

2   A lack of payer recognition. The treatment was not considered a first-line treatment by payers and this was seriously limiting adoption. He implemented plans for his team to generate better payer recognition by drawing out a refreshed narrative through cost-savings data.

3   Concerns around the delivery method. Customers repeated patient concerns that the therapy's delivery method was a barrier to uptake. He decided to update his patient protocols, turning towards a more patient-centric approach and drawing out new advice to match.

Because of the speed of the recommendations, the marketing manager could muster teams and make the necessary changes in the next weekly check-in. Otherwise, it would have taken months to generate an unwieldy report into market data that would already be out of date by the time it was written and certainly by the time it was read.

The manager claims he was able to increase the market takeup of the product by 40%. With returns like that, who could resist installing their own GPS system?

The Launch GPS is also able to take into account more nuanced, unprompted insights from interactions that are difficult for a human to spot. Another medical manager we spoke to discovered she was facing challenges around traditional engagement methods by using the program: in-person meetings often emphasised insights based on the seniority of the speaker, limiting the full breadth of perspectives.

The insights management platform was able to sift through much broader data sets, focussing on the more frequent, asynchronous engagements across global teams. This approach allowed for deeper, more considered insights with customers on the ground, bypassing the logistical constraints of in-person interactions or live virtual meetings.

Within the first year, the company saved over $3 million in hard costs and saw a 10x ROI, as well as improved cross-functional information sharing, which directly influenced business outcomes. This included a 1% revenue lift in the brands that benefited from the insights generated through these engagements.

HOW TO TRAIN
YOUR GPS

With your Launch GPS successfully installed, the benefits will be quickly felt by commercial teams. However, to maximise its capabilities, there are four changes to structure and mindset that can be made to shift commercial teams onto a more nimble footing to realise the full potential of the Launch GPS.

1   Treat insights as strategic assets, not as a support function

First, get a good understanding of the information you're looking for. Commercial and medical managers should drive the creation and adoption of key business questions or Key Insight Topics (KITs) and Key Intelligence Questions (KIQs) - a terminology already gaining currency in medical. This makes sure that evidence generation and market understanding align with commercial goals. By collaborating with medical, R&D and market access early, commercial teams can shape the product narrative, identify unmet needs and stress-test positioning before market entry.

2   Improve insight-to-strategy skills in commercial teams

With a diverse range of insights to process and a new integrated platform to master, your teams are going to need better insight 'literacy', on both the global and the local level. The Launch GPS can help interpret scientific and behavioural insights and convert them into a clear commercial strategy, but it's key to invest in training or create hybrid roles (e.g., commercial insight leads) that sit at the interface between data, insights and execution. This is about nurturing the expertise to feed the Launch GPS, and establish organised ways of feeding, formatting and loading high-quality data into the program as well as interpreting and using what comes out at the other end.

3 Ditch your 'launch plan' for a product strategy

Your launch plan is out of date by the time you come to market. Ditch it. Instead, use your new structure for cross-functional insights governance to deliver mechanisms—such as quarterly insight reviews or scenario workshops—that allow your teams to pivot in response to new data as and when it arrives. Incentivise teams to revise the strategy based on validated insights rather than rely on historical templates.

4 Know your destination, but be flexible about how you get there

Your insight infrastructure is now in place. It's time to decide what you're going to do with it. Use predictive modelling, market simulations and real-time feedback tools to shape tailored, future-facing strategies within the Launch GPS. When insights are integrated early and often, commercial teams gain a clearer understanding of market readiness and HCP expectations before product rollout.

To succeed in a competitive, data-saturated landscape, commercial managers must take a leading role in turning insights into action. This means driving early alignment with cross-functional teams, embedding agility into strategy and cultivating the ability to interpret and apply insights at speed. The most effective commercial leaders are not just executors of strategy—they are architects of informed, adaptable, insight-led market entry plans.

"We live in such a data-rich time… but I don't know if we're necessarily taking the time to understand the data or the trends… you've got medical gathering their own insights, which they aren't sharing with the commercial team—in the meantime, commercial teams are starting from scratch."

APRIL KELLY
US HEAD OF MARKET DEVELOPMENT
TYPE 1 DIABETES
SANOFI

YOU HAVE REACHED YOUR DESTINATION

We've demonstrated throughout this whitepaper plenty of room for improvement in how pharma product launches utilise insights.

[6] Boston Consulting Group (2023). "The Future of Integrated Evidence Planning in Biopharma." BCG Henderson Institute.

[7] Deloitte. (2023). "MLOps with Impact." Deloitte Digital.

[8] PwC Health Research Institute. (2024). "Process Optimization in Life Sciences Data Management." PwC

[9] Bain & Company. (2024). "The Pharmaceutical Innovation Imperative: Cross-Functional Data Integration." Bain Insights.

[10] Pfizer-commissioned study by IQVIA. (2023). "Evidence Planning and Market Access: Quantifying the Value of Integration." Pharmaceutical Executive

Even other industries with similar regulatory restrictions have found a way to turn raw customer data into something that provides leaders with real strategic options. Perhaps we think that because we work in a relatively unique kind of B2B model, our markets are of a fundamentally different character to those of other industries and that we're stuck with the status quo.

Whatever excuses we use, we don't have much time left to make them; new technology is rapidly changing field operations, and AI is turbocharging a transition to more hybrid field roles, based around new skillsets for sales teams and MSLs. New systems and tools that encourage collaboration and enable better data integration have already delivered positive impacts on reducing R&D costs,[6] increasing collaboration[7] and improving process efficiency.[8] Even nascent versions of the kind of comprehensive data strategy and governance that would provide the perfect platform for launch GPS, have shown a 50% increase in innovation and market success[9] and 25% reduction in time to market.[10] The companies that ignore this evidence and the emerging solutions that will improve on these already impressive numbers will remain entrenched in their legacy ways and will be left behind.

This is not a story of computers taking over, it is one of tech-driven human empowerment: it will be the decisions that managers make with AI-organised data that will differentiate the performance of companies in the future. The age of the lost launch is over; the age of the Launch GPS is just beginning.

"What we've found is that a lot of off-the-shelf large language models tend to be very broad, and they're trained on a lot of broad data. They're trained to be very smart in their understanding of the text, but they're not specific to what we do in life science and medical affairs."

JASON SMITH
CHIEF TECHNOLOGY OFFICER
AI AND ANALYTICS
WITHIN3

Methodology:
The evidence base

The insights and recommendations in this whitepaper are drawn from three Impatient Health activities that took place from March to May 2025:

- A webinar titled 'Insights: Rocket Fuel for Launch', March 11th

- A workshop with pharma leaders in Philadelphia, April 22nd

- A qualitative research study with 17 pharma executives in launch-related roles across the US and Europe

Webinar | Hosted by Paul Simms, CEO of Impatient Health, with a panel comprising:

- Luca Dezzani, Vice President US Medical Affairs, BioNTech SE

- Mark Montgomery, Vice President & International Head, Integrated Insights, Novartis

- April Kelly, US Head of Market Development, Type 1 Diabetes, Sanofi

- Andreas Gerloff, Director Medical Excellence Operations, Daiichi Sankyo

- Lance Hill, CEO, Within3

Data from poll questions answered by attendees at sign-up and during the webinar is included in this whitepaper.

Workshop | Cross-functional interactive discussion, facilitated by Impatient Health, bringing together experts from AstraZeneca, GSK, Lilly, Biogen, Sanofi, Novartis and Chiesi. The workshop focused on a single challenge: how can AI become a true unfair advantage in launch, not just a buzzword?

The workshop was held under The Chatham House Rule; insights included in this whitepaper are not attributed to individual participants.

Qualitative research | Delivered by the Impatient Health Research Team, with a sample of 17 senior pharma executives from different company sizes and varied launch-related roles across the US and Europe. A qualitative discussion guide was used to facilitate interviews covering existing launch challenges, insights requirements and factors that would support aspirations for more insights-driven launches in the future.

Participation in this research was confidential and insights included in this whitepaper are anonymised.

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LAUNCH: RELAUNCHED

The rise of real-time market intelligence

JULY 2025