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Capability Without Coherence

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LUCID STRATEGY CONSULTING 2026



CAPABILITY WITHOUT COHERENCE

A perspective on why pharma's tools are outpacing its ability to deliver value

SETTING THE SCENE

Pharma today is well equipped.

Across the industry, organisations have invested heavily in advanced platforms, data assets, AI capabilities and digital transformation programmes. There is no shortage of ambition, technology or analytical firepower.

Yet outcomes continue to disappoint.

- Launches still underperform expectations
- Market access decisions grow tougher, not clearer
- Patient centricity remains uneven in practice
- AI pilots multiply, but scale and impact lag
- Commercial, medical and access teams still struggle to act as one

Taken together, this points to a defining problem: **capability has outpaced coherence.**

Pharma has assembled the gear — but not the system required to use it well. Tools proliferate

faster than shared understanding. Data is abundant, yet decisions remain fragmented. Functions optimise locally, while value is diluted globally.

The challenge is no longer whether pharma has the right tools.

It is whether those tools are connected by a coherent foundation that allows the organisation to **think, decide and act as one.**

This gap often appears early — even before asset and brand strategy is defined — when organisations move too quickly from internal ambition to execution, without first building a rigorous, outside-in understanding of the healthcare ecosystem they are launching into.

Nowhere is this tension more visible — or more consequential — than in Real-World Evidence, where data abundance often disguises the absence of shared understanding, decision confidence and organisational alignment.

WHY CAPABILITY WITHOUT COHERENCE IS NOW A STRATEGIC RISK

The industry is under growing pressure from all sides: regulators, payers, health systems, clinicians and patients. In this environment, fragmentation is no longer inefficient — it is dangerous.

Across the following challenges, a consistent pattern emerges: **assets exist, but shared reference points do not** — often because organisations lack a common, externally grounded view of how care is actually delivered, funded and experienced.

Patient focus without shared understanding

Most organisations speak confidently about patient centricity, yet patient insight remains unevenly distributed, inconsistently interpreted and rarely grounded in a holistic understanding of the broader care ecosystem. Without an outside-in view of how patients interact with

clinicians, services, pathways and systems, “patient-first” becomes a slogan rather than a strategy.

Data everywhere, evidence nowhere

Pharma is rich in data but poor in trusted, decision-grade evidence. Insights are generated in silos, interpreted differently across functions, and rarely anchored in a shared picture of real-world care delivery, system constraints and behaviour outside the organisation's immediate control.

AI accelerating confusion

AI amplifies whatever foundations it is built upon. When applied without a strong outside-in diagnosis of the healthcare ecosystem, it increases speed — but not relevance or clarity. The result is more output, faster decisions and greater inconsistency.



Silos reinforced by structure

Despite collaboration rhetoric, incentives, budgets, timelines and governance continue to encourage function-first behaviour. In the absence of a common, external frame of reference — such as how value is created and assessed within the healthcare system — each team optimises locally and coherence breaks down.

Leadership stretched beyond limits

Leaders are expected to make enterprise-wide trade-offs without enterprise-wide visibility. Without a shared, ecosystem-level understanding of market dynamics, stakeholder priorities and evolving pressures, judgement becomes subjective, risk aversion increases and momentum stalls.

FROM CAPABILITY TO COHERENCE:

What Actually Needs to Change

If *capability without coherence* is the core problem, then the solution is not another wave of functional optimisation or technology investment..

Coherence is built when organisations create shared understanding, shared evidence, shared priorities and shared accountability — informed by a disciplined, outside-in view of the healthcare environment they operate in.

Across organisations making tangible progress, several foundation-building shifts stand out.

1. Re-anchoring strategy around shared customer and patient realities

Many pharma strategies fail not because they ignore patients, but because **different parts of the organisation hold different versions of the truth** — often shaped more by internal objectives than by an external view of care delivery.

Coherence improves when organisations invest early in **rigorous, outside-in diagnosis of the healthcare ecosystem** they are launching into: how patients move through care, how clinicians make decisions, how services are organised and how value is perceived by different stakeholders.

This understanding must then be translated into **shared, evolving views of customer and patient realities** that are reused consistently across commercial, medical, access, support and leadership decision-making.

Moving beyond static segmentation and linear journey maps toward **dynamic, multi-actor representations of real-world experience** ensures strategy reflects reality — not assumptions.

2. Treating RWE as a strategic asset — not a support activity

Real-World Evidence is one of the clearest illustrations of capability without coherence.

Most organisations hold real-world data, yet lack a true **RWE capability** — particularly one grounded in the broader healthcare ecosystem rather than confined to narrow use cases.

Access to **live, curated real-world data ecosystems** enables organisations to:

- anchor decisions in an externally validated view of care pathways and outcomes
- align functions around shared facts rather than competing interpretations
- generate insight that reflects system-level pressures, not just internal questions
- monitor impact over time as the ecosystem evolves

RWE does not create coherence on its own — but without it, coherence remains fragile and difficult to sustain when exposed to payer scrutiny, regulatory challenge or real-world complexity.

3. Embedding evidence into decision-making, not just analysis

Even when insights exist, they often fail to shape strategy.

Coherent organisations are explicit about how **ecosystem-level insight and evidence** informs asset strategy, launch sequencing, investment trade-offs and ongoing course-correction.

By designing decision processes that deliberately absorb evidence — and revisit decisions as real-world signals evolve — organisations reduce reliance on internal opinion and increase strategic confidence.



4. Breaking silos by changing structures, not slogans

Silos persist because they are structurally reinforced — not because people resist collaboration.

Alignment improves when planning cycles, success metrics and accountability are designed around **shared outcomes that reflect how value is created and recognised within the healthcare system**, rather than internal functional outputs.

An outside-in view of the ecosystem provides the reference point needed to align these structures.

5. Applying AI and digital pragmatically — in service of clarity

AI and digital tools are powerful amplifiers — but only of what they are trained on.

When grounded in a strong understanding of the healthcare ecosystem, they can:

- sharpen insight

- accelerate prioritisation
- improve responsiveness

When deployed without it, they simply scale internal bias and fragmentation.

The shift is not more AI, but **better-directed AI**, applied where it improves clarity and decision-making.

6. Enabling leaders to act as enterprise stewards

Finally, coherence is a leadership issue.

Leaders cannot make effective enterprise-wide decisions without shared visibility into how the market, care system and stakeholder expectations are evolving.

Organisations that progress invest deliberately in shared evidence foundations, ecosystem-level dashboards and decision forums that cut across functions — enabling leaders to steward the business in context, not in isolation.

Final Thought

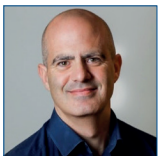
Pharma's challenge today is not a lack of tools, data or ambition. It is a failure to connect them into a system that consistently delivers value.

Capability without coherence is not solved by adding more sophistication at the edges, but by reinforcing the foundations at the centre.

Real-World Evidence, shared customer understanding, disciplined decision-making, aligned structures and pragmatic technology use — are critical levers to achieve that coherence.

The winners of the next phase will not be those with the most advanced capabilities, but those who learn how to make their capabilities work together, based upon a consistent understanding — deliberately, reliably and at scale.

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At **Lucid Strategy Consulting**, we combine strategic insight with deep life sciences expertise to deliver impact for our clients. We help leaders unlock their assets' full potential, transform their functions across development & commercial, and create new value for their customers and patients.