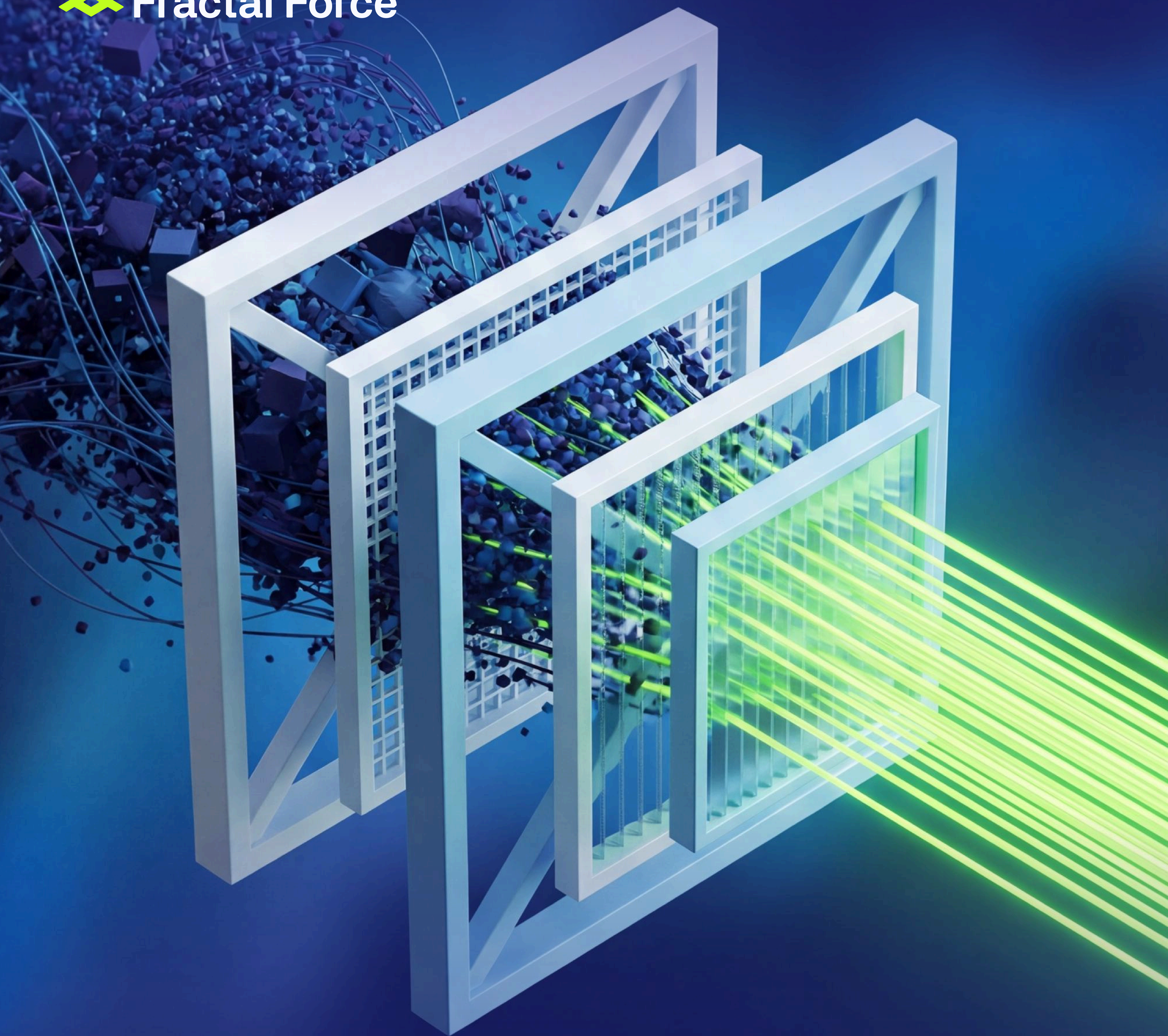
Fractal Force



Our 2026 HCP Engagement Predictions: Separating Signal from Noise

By Pieter Vanderbeeken & Mark Watson, Fractal Force

We spent the last few weeks researching what the industry expects from HCP engagement in 2026. We reviewed LinkedIn articles and posts, reports from the likes of Accenture, McKinsey, Deloitte, IQVIA, ZS Associates, and dozens of industry publications of agencies and advisories. We synthesised the findings, and then we sat down for a four-hour discussion about what we actually believe.

Here is our honest assessment: 2026 will see massive investment in trends that will not deliver impact this year, and underinvestment in fundamentals that will.

We argue that the challenge is separating signal from noise.

The Trust Crisis Hiding in Plain Sight

The data confirms what the macro trends predict. Research shows time and time again that HCPs feel overwhelmed by pharmaceutical communications, especially when we do not fully understand their requirements.

These numbers are not improving. Quite the opposite, they are getting worse. Despite billions invested in digital transformation, omnichannel platforms, and now AI, the fundamental problem persists: by and large, HCPs do not trust pharmaceutical engagement.

This is the context that most industry predictions ignore. They talk about technology capabilities without asking: will HCPs actually engage with this? Will they trust it? Or will it simply become more sophisticated noise?

The Industry Consensus

Credit where due. The research reveals a remarkable consensus across consultancies, vendors, and analysts. The themes we see coming back are consistent:

- Agentic AI as the transformative technology.
- Omnichannel execution moving from aspiration to reality.
- Hyper-personalization at scale.
- The hybrid rep model.
- Medical Affairs gaining strategic prominence.
- Measurement shifting from activity to outcomes.

We don't say that these are entirely wrong. We agree that they are directionally correct. However, the question is whether they address the trust problem or simply add more sophisticated tools to a broken model. Our experience working with pharmaceutical companies tells us there is often a significant gap between what the industry talks about and what actually moves the needle with HCPs.

Trends Do Not Exist in a Vacuum

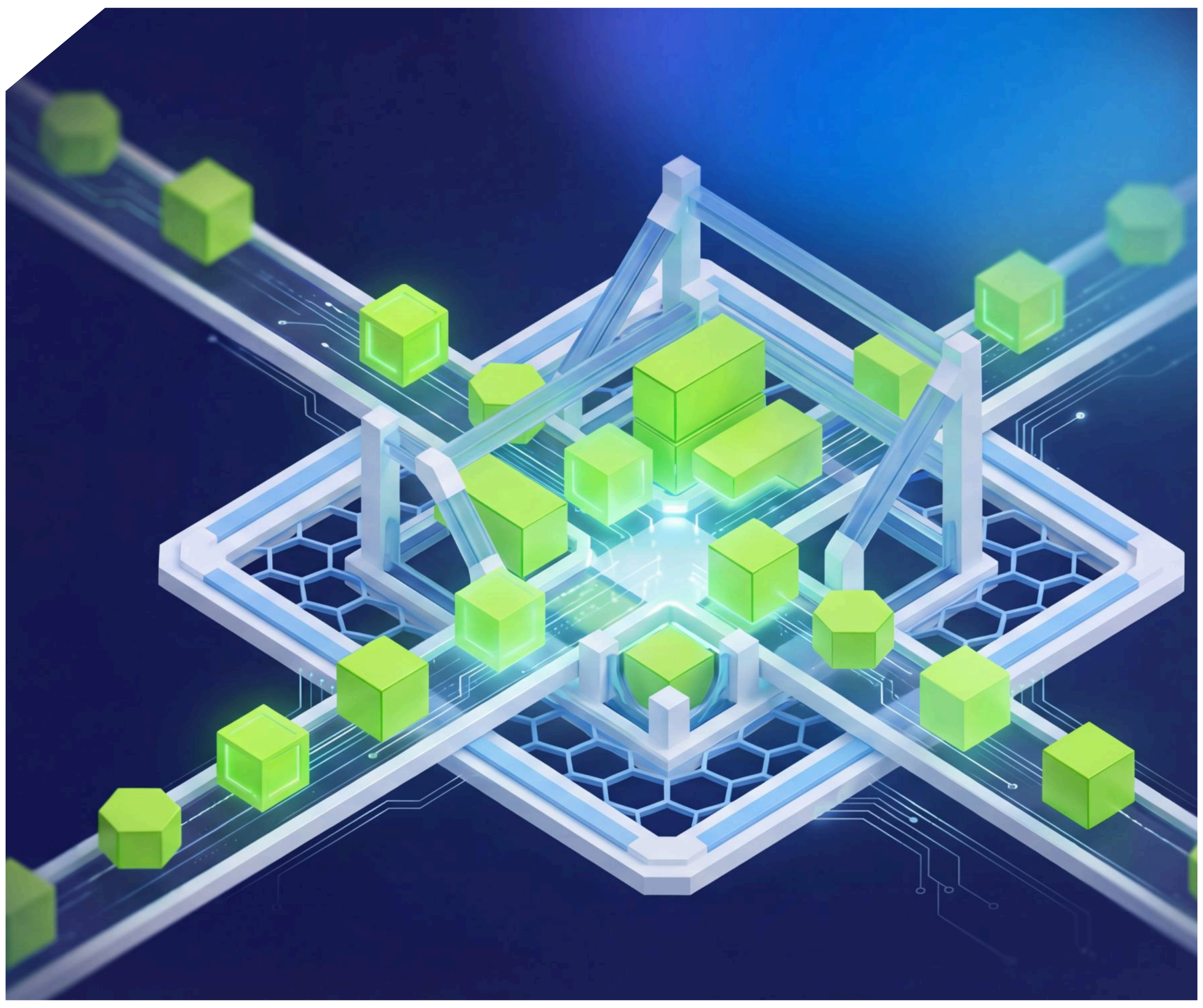
Before diving into predictions, we need to step back. At its core, HCP engagement is simple: life sciences companies promoting products to healthcare professionals. But this interaction does not happen in isolation. It is shaped by macro forces that influence companies, products, and HCPs simultaneously. Here are some you likely recognise:

- **Technology** now enables content creation and distribution at near-zero marginal cost. AI can generate endless variations of messages, emails, and assets. This is of course not just a pharma phenomenon. This trend is quickly reshaping every industry and every consumer experience.
- **Demographics** are shifting as digital-native physicians enter practice, but the decision-makers with prescribing power remain largely Gen X and older Millennials who did not grow up with AI and do not automatically trust it.
- **Global macro-economic uncertainty** creates pressure and further drives companies toward automation and efficiency, often at the expense of relationship-building.
- **Regulatory requirements** around AI transparency and data privacy are tightening, adding friction to digital engagement.
- And **society-wide digital fatigue** does not stop at the clinic door. HCPs are consumers too, bombarded with content, from all angles, in every aspect of their lives.

These forces converge to create a specific problem: the tools designed to increase engagement are simultaneously eroding the trust required for engagement to work. More content, more channels, more personalization, all delivered at scale and speed to people who are increasingly overwhelmed and skeptical. Understanding this dynamic is essential for making sense of which trends will deliver and which will disappoint.

This is our lens for separating signal from noise: trust. It's plain, simple, old-school, a lot less sexy than shiny objects, but the fundamental enabler of relationships.

The trends that will deliver are those that build trust with HCPs. The trends that will disappoint are those that ignore the trust deficit or assume technology can bypass it.



Where We See Lots of Talk, Limited Impact in 2026

Let us be clear: we are not saying these trends are wrong. We are saying they will not deliver meaningful impact in 2026 specifically. They may dominate conference agendas and attract significant investment, but the execution reality is further away than the hype suggests. And critically, they do not solve the trust problem.

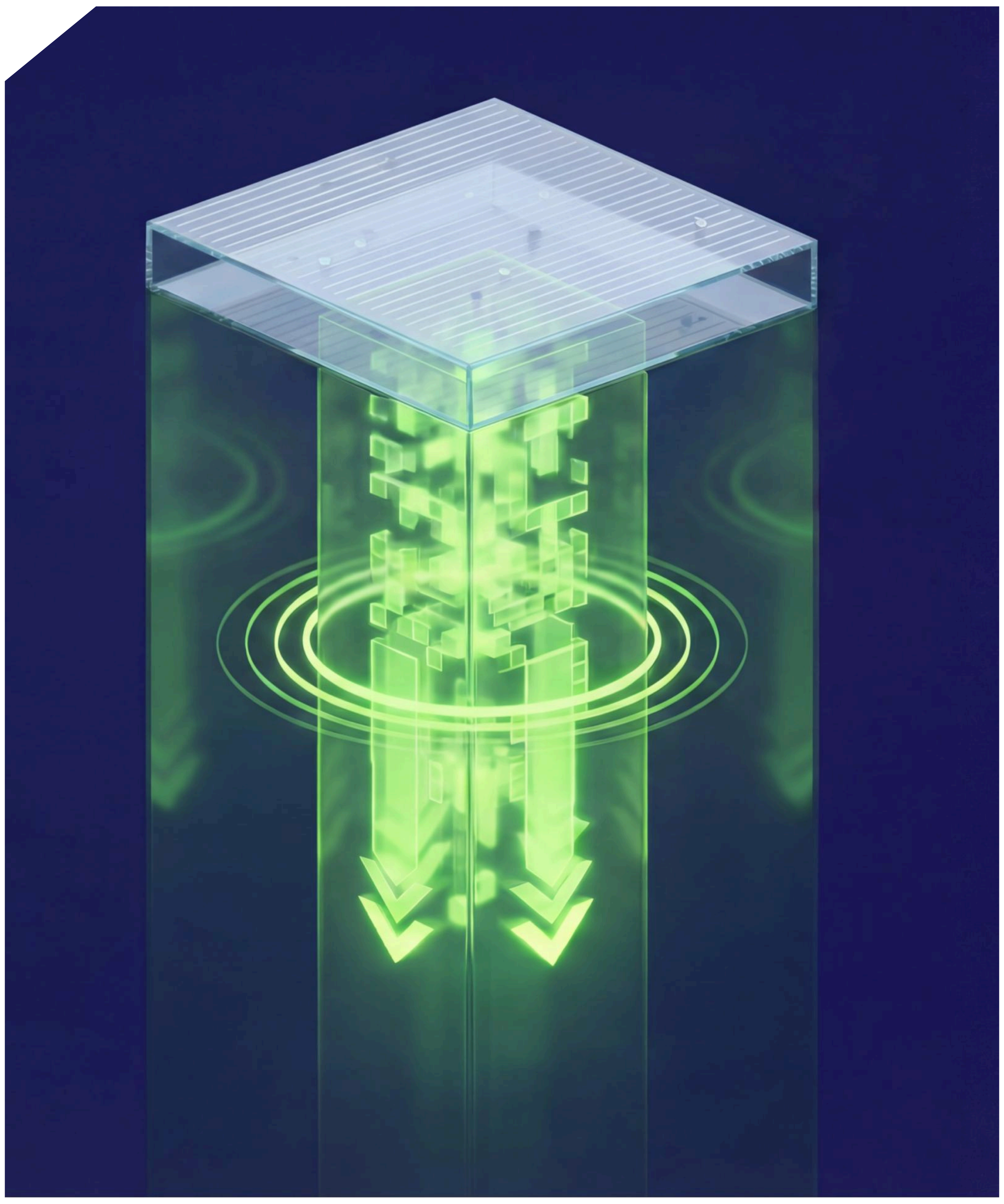
Hyper-Personalisation at N=1

Knowing every HCP so well that you can deliver perfectly tailored content at precisely the right moment through exactly the right channel. It is a beautiful vision. Or is it just a dream? How much personalisation is effective, and makes sense from a cost-benefit analysis point of view?

It's straightforward in theory but difficult in practice due to significant constraints. We often lack adequate relevant data on individual HCPs. Additionally, our understanding is limited to our own ecosystem. We don't know what they did on competitor websites, Medscape, or Google. Even if we had the data, we wouldn't have enough content variations to feed a personalisation engine at that scale.

There is also a trust paradox here. Highly personalised messages from companies you do not trust can feel creepy rather than helpful. "Dear Dr. Smith, we noticed you attended a webinar on adverse events last Tuesday..." Without an underlying trust relationship, personalisation can backfire. It signals surveillance rather than service.

Our prediction: Companies will continue investing in personalisation capabilities, but N=1 remains aspirational. The pragmatic middle, smart segmentation that evolves with maturity, is where actual progress happens



Agentic AI

The concept is compelling: AI systems that can reason, plan, and execute commercial workflows autonomously. Prepare pre-call briefings, update CRM records from voice notes, and trigger compliant follow-ups without human intervention. The potential is obviously massive.

Yet, the reality we see in our daily practice is very different. Most pharmaceutical companies have not yet properly implemented generative AI, let alone moved to agentic systems. The data infrastructure is not in place, data quality is low, or there simply isn't enough data. The platforms and systems are not integrated. The people are not trained, skills and experience are missing. And then there are the MLR review processes, which create fundamental bottlenecks that autonomous systems cannot navigate.

Our prediction: Agentic AI will be the talk of every conference in 2026. Consultancies will sell transformation programs. Pilots will be announced. But meaningful commercial impact? That is for 2027 or 2028, assuming the foundations get built this year.

Omnichannel Finally Working

Let's start by saying we'd rather retire the word "omnichannel." It puts the focus on channels and technology when the attention should be on the customer. We prefer "customer engagement," plain and simple. Channels are a means to an end, not the end itself.

Omnichannel has been predicted to mature every year for the last decade. An entire industry (and many job titles) have been built upon the promise. Yet industry data shows only a minority of pharma companies are satisfied with their omnichannel performance.

Our assessment: after years of investing in technology, data integration, processes, frameworks, training, and change management, most organisations have the fundamentals in place. But having the fundamentals is not the same as making it work. Most are still struggling to deliver on the promise of true orchestration.
2026 will see incremental progress, not breakthrough. The companies that succeed will be those who focus on relevance and trust rather than adding more channels or more technology. Omnichannel should never be a cover for pushing more messages, or a delivery mechanism solely focused on answering the question of how to reach HCPs, or amplifying noise more efficiently.

The Game Theory Trap

Why does the industry keep investing in approaches that do not solve the trust problem? Game theory.

Every company must keep pushing messages because if they stop, competitors will fill the void. The incremental cost of creating and distributing content, especially with AI, is approaching zero. So the rational strategy for each individual company produces an irrational outcome for the industry: an ever-increasing wave of content that erodes trust for everyone.

This is a macro force playing out at the industry level. We cannot entirely escape this trap. But we can be smarter about where we invest within it.

Our Predictions for Actual Impact in 2026

Here is where we would place our bets. These are the trends we believe will deliver real, measurable progress this year. What they share: they either build trust directly or they support the people and processes that build trust.

1 The rep becomes the trust unlock

In a world of digital noise and AI-generated content, the human representative becomes the scarce resource that unlocks digital amplification. This is our most important prediction.

When an HCP has built a relationship with a rep, they open that rep's emails. They attend webinars the rep recommends. They engage with content the rep shares. The rep is not one channel among many. The rep is the key that opens the door to all other channels.

Without that trust relationship, digital outreach is sophisticated spam. With it, digital becomes an amplifier. This is why we believe the hybrid orchestrator model, properly understood, is about trust-building first and channel orchestration second.

Our prediction: Companies that invest in developing their field teams as relationship builders rather than message deliverers will outperform those who invest only in technology.

2 Medical Affairs steps into the foreground

Here is a data point that matters: HCPs value MSL interactions significantly more than sales rep interactions. Why? Trust. MSLs are perceived as scientific peers rather than commercial promoters. They can engage in questions that reps cannot touch. They bring credibility. The scientific narrative is the commercial narrative. As therapies become more complex and as trust in commercial messaging erodes, the credibility of medical and scientific communication becomes a competitive advantage.

Our prediction: 2026 sees Medical Affairs step into a more prominent strategic role. Not just collaborating with commercial, but leading on engagement strategy where scientific credibility matters most. Companies that elevate Medical Affairs will build trust that commercial teams struggle to establish on their own.

3 Content creation at scale hits its stride

This is where AI provides real value today. Modular content approaches combined with compliance-by-design systems enable rapid creation of compliant content variations. MLR review times are decreasing from months to weeks. Content production costs are falling by 30-50%, and speed is increasing significantly.

The key is that the AI works within pre-approved guardrails. It combines approved claims, messages, and assets in compliant ways and intelligently assembles approved components.

A word of caution: more content is only valuable if it is more relevant content delivered in trusted contexts. Content at scale without trust at scale just accelerates the noise. The opportunity is real, but it must be paired with the other predictions on this list.

4 Pull strategy gains strategic importance

Because the push model is increasingly counterproductive, discoverability becomes critical. Being findable when the HCP needs information, on their terms, at their moment of need.

This includes the emergence of GEO, Generative Engine Optimization, as a strategic priority. As search increasingly runs through AI-powered systems and platforms, the ability to be surfaced in these responses matters.

The pull model builds trust differently from push. When an HCP finds you because they were looking for information, the dynamic is fundamentally different from when you interrupt them with a message. They came to you. That is the beginning of trust.

Our prediction: Forward-thinking companies will invest in discoverability as a strategic priority, recognising that being findable when HCPs need information builds trust in ways that push marketing cannot.

5 Measurement evolves from activity to resonance

The end of vanity metrics has been predicted before. But we see real demand from leadership this year for proof that engagement efforts make a difference. Opens and clicks are no longer sufficient justification for investment.

The shift we see is from measuring reach to measuring resonance. Did the message land? Did it change behaviour? Did the HCP engage further or disengage? These are harder to measure, but they are proxies for something important: did we build or erode trust?

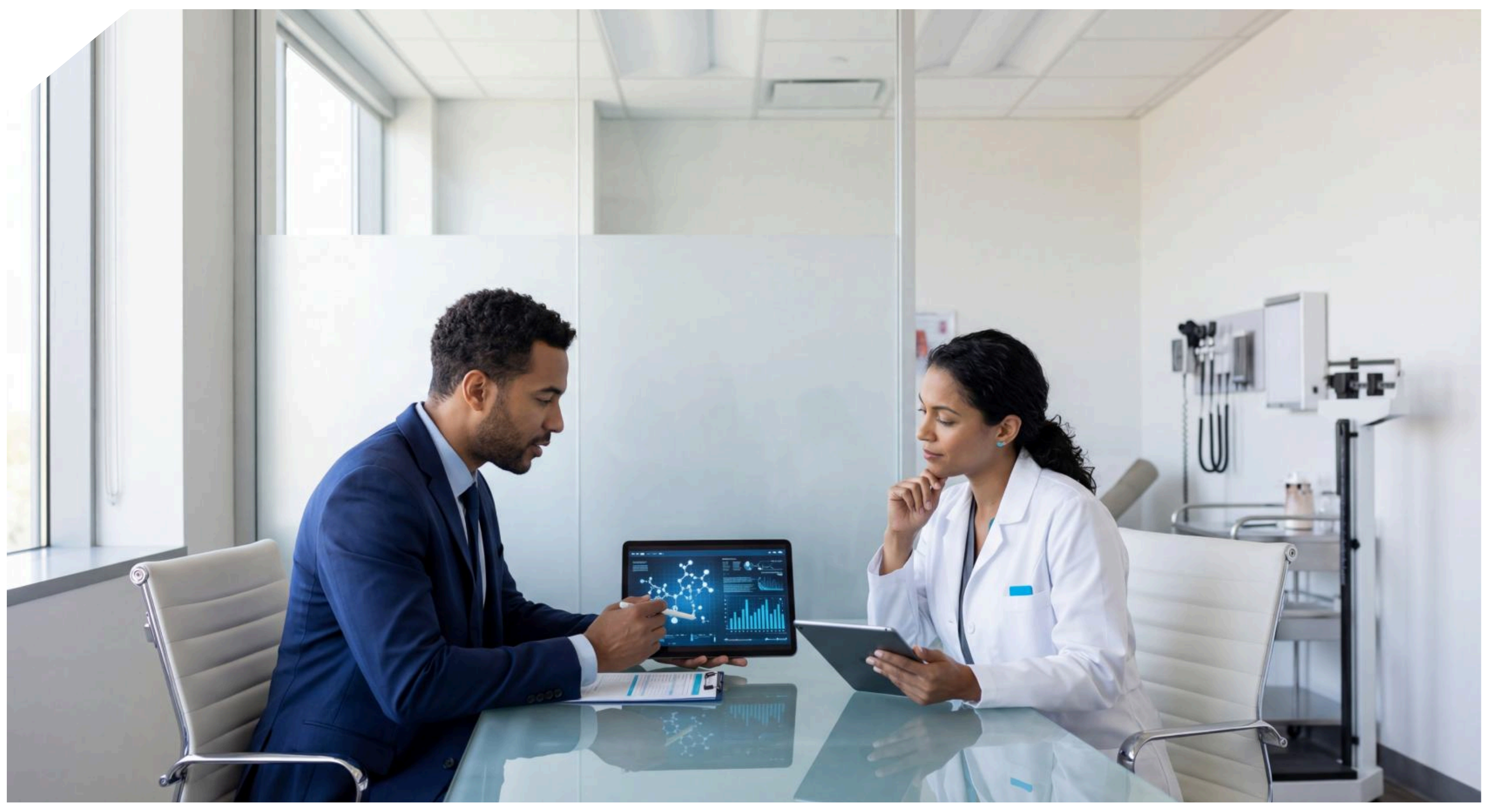
Our prediction: Companies will invest in better analytics and measurement models. The question will shift from "how many did we touch?" to "how many trusted us more after the interaction?"

6 Smart personalisation finds the pragmatic middle

Between simple segmentation and impossible N=1 lies a pragmatic middle ground. Intelligent personalisation that matches the brand's maturity, the available data, the organisation’s capabilities, and the content supply chain.

The key insight: personalisation in a trusted relationship feels like service. Personalisation without trust feels like surveillance. So the sequence matters. Build trust first, then personalise. Start simple. Add complexity as you earn the right to know more about your HCPs.

Our prediction: The companies that succeed with personalisation will be those who right-size their ambitions to their trust levels and build incrementally.



The Thread That Connects Everything

Look across our predictions, and we hope you see a clear pattern emerge. The trends that will deliver are those that build trust: human relationships, scientific credibility, being findable when needed, and measuring what matters. The trends that will disappoint are those that assume technology can bypass trust: autonomous AI, hyper-personalisation without relationship, and more channels delivering more messages.

This is not an argument against technology. Technology is essential, we are strong believers. But it should be an enabler, not a solution. The companies that use technology to support trust-building will outperform those who expect technology to replace it.

Where We Would Invest

If we were advising a pharmaceutical company on their 2026 priorities:

Invest in your people.

The hybrid rep model requires relationship builders, not message deliverers. Training and development here will pay dividends that technology investments cannot match.

Elevate Medical Affairs.

Give them a seat at the strategy table. Their credibility is an asset in a low-trust environment.

Fix your foundations.

Data integration, content operations, measurement systems. These are not glamorous, but they determine whether everything else works.

Use AI where it delivers today.

Content creation, data synthesis, sales force effectiveness. Do not expect it to solve the trust problem.

Build for discoverability.

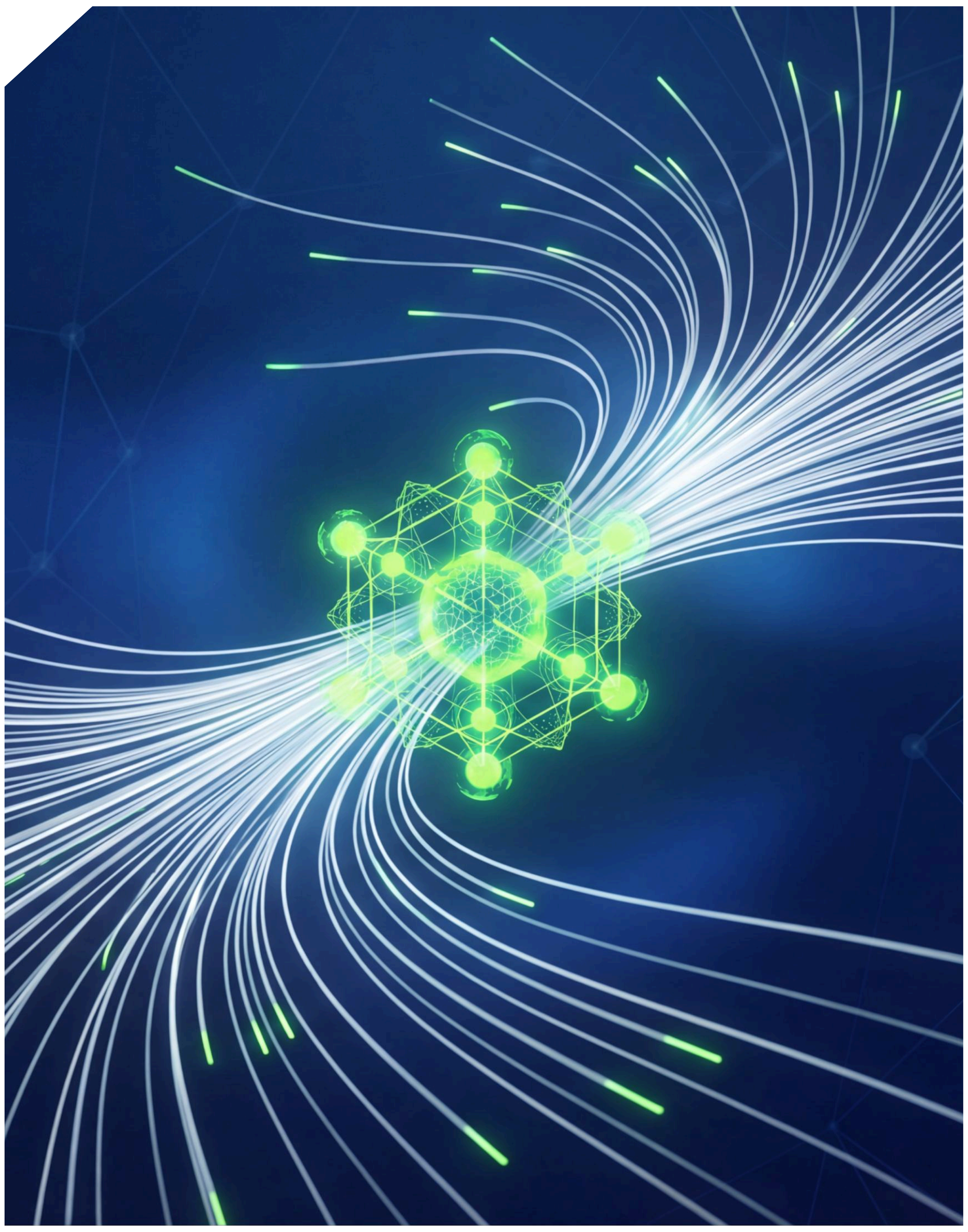
Invest in pull alongside push. Being findable builds trust differently than interrupting.

Upgrade your measurement.

Start measuring resonance and behavioral change, not just activity. It is harder, but it tells you whether you are building or eroding trust.

Be skeptical of silver bullets.

When someone tells you agentic AI will transform your commercial operations in 2026, ask them how it solves the trust problem. The answer will be revealing.



The Gradual Truth

Change in pharmaceutical commercial operations happens slowly. We predicted trends last year that have not fully materialised. So did everyone else. The predictions for 2026 look remarkably similar to those for 2025, which were remarkably similar to those for 2024.

This is the nature of an industry shaped by the macro forces we described: healthy margins that remove urgency, regulations that create friction, and organisational structures that favour incremental change. There is no burning platform forcing rapid transformation.

But gradual change is still change. And we believe the gradual shift will be toward what has always been true: technology is an enabler, not a solution. Relevance without trust is just noise. The companies that build genuine relationships with HCPs will outperform those who believe technology alone will save them.

That is the signal in the noise. That is where we would place our bets.

What is your take? Which predictions resonate? Where do you disagree? We would welcome the conversation.

About Fractal Force

Architects of Customer-First Foundations for Life Sciences

We are HCP engagement architects, helping life sciences companies achieve customer-centricity by rebuilding foundations from brand-centric to customer-first. Rather than layer technology onto broken systems, we fix the underlying architecture first, ensuring your omnichannel, AI, and other digital investments truly deliver ROI.

The operating model challenges explored in this white paper are precisely the issues we address every day. The shift from brand-led to customer-led orchestration represents a fundamental transformation of over 100 years of pharmaceutical industry DNA, and we're built specifically to help you navigate it.

Our Approach: The Five Foundation Pillars

We address the entire ecosystem through five interconnected foundations that sit at the core of HCP engagement:

1. Data & Analytics Architecture: Data strategy, governance, integration, and advanced analytics that convert raw data into actionable insights.

2. Segmentation: Development of meaningful customer segments that drive personalisation and resource allocation.

3. Engagement Journey Design: Design and execution of cross-functional, integrated HCP engagement journeys.

4. Agile Operating Models: Streamlined planning processes, organisational structures, and governance to execute with speed and efficiency.

5. Impact Measurement Frameworks: KPIs and measurement models that shift focus from tracking activity to measuring true business impact.

Our Operating Model: A Network of Senior Experts

We orchestrate a growing global network of senior independent experts and technology partners. This plug-and-play model allows us to match precisely the right expertise to your unique challenges—no junior staff learning on your budget, no standardised solutions that don't fit your reality.

How We're Different

Global Talent Network → While traditional firms rely on finite in-house resources, we draw from a global network of vetted senior experts across commercial and medical excellence, omnichannel, digital transformation, change management, and technology architecture.

Flexibility & Agility → Our network brings deep and diverse expertise, allowing seamless integration of specialised talent to tackle your most complex challenges.

Cost-Effectiveness → Very limited overhead costs and no risk of bench-sitting consultants lead to competitive pricing while protecting your margins.

Senior Experts Only → Every engagement is staffed with vetted talent with extensive industry and advisory expertise. No "bait and switch."

Our Guiding Principles

Simplicity → We avoid intellectual gymnastics and adhere to the KISS principle.

Integration → We address the entire complexity, not just isolated parts.

Execution → We roll up our sleeves and iterate until we find the optimal way.

Impact → We instill an impact-focused mindset into every project.

Ready to Transform Your HCP Engagement Operating Model?

We start by mapping your unique situation through a rapid, targeted audit to assess your foundational maturity, then co-create a practical, prioritised roadmap for rebuilding your foundations.

Get in touch: info@fractal-force.com | www.fractal-force.com

Pieter Vanderbeeken & Mark Watson — *Co-founders, Fractal Force*