



Considerations
for upcoming CRM
transformation

The pharmaceutical industry is approaching the deadline to make a major decision about the future of customer relationship management (CRM). Veeva and Salesforce are ending their partnership starting in 2025, with the full separation complete by 2030. Both companies will be offering their own platforms from this point on, and the vast majority of pharma organizations will be choosing one or the other to support their CRM processes.

Each platform has its pros and cons depending on the current needs and future goals of the pharma community. But either way, the choice will likely have major implications for the future of the CRM process.

How can pharma companies make the best possible choice for their organizations and prepare for the transformative impact of the next generation of CRM capabilities? Success starts with clearly understanding the key considerations tied to readiness and establishing a comprehensive vision for their ideal future state of CRM workflows. Below are strategic considerations that can help leaders get started with starting the right conversations to promote a swift and seamless transition.



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Create a strategic vision for the future of CRM

Companies that treat the Veeva-Salesforce split as an opportunity to reimagine the CRM ecosystem are likely to have more success in a customer-focused, AI-enabled future. Key decisions to consider as part of the decision-making process, include:

What are our strategic customer relationship management goals in the next 3-5 years?
What about the next 10 years?

Where is our portfolio headed? What business constraints, internal or external, may impact our ability to grow and compete?

How will key roles within our business change in the next 3-5 years to align with our competitive strategy?
What experience will we enable through our CRM?

How much personalization will we need in our CRM infrastructure? For example, is an open ecosystem important to achieving our needs?

Could these answers be different by market or major business unit? How can we ensure that each component of the organization successfully navigates the transition?



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Assessing opportunities to implement changes to legacy workflows

Assessing the current state is essential to inform decisions that will affect the future. Organizations should conduct a thorough capabilities assessment to identify opportunities for improvement.

What new capabilities will be crucial for supporting our new strategic vision? Conversely, what current capabilities can be eliminated to streamline and simplify future workflows?

How will artificial intelligence, including AI agents, play a role in bringing future-ready workflows to life?

Which vendor offers more of the capabilities that will enable our forward-looking goals?

How will these new toolsets enable a more automated, personalized, and robust relationships with high-value customer segments?



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Determining a rollout strategy and build methodology

Should the rollout of new CRM infrastructure be organized by region or by product? Which method will be easier to scale with the fewest challenges in terms of data standards and sources, compliance issues, and customization needs?

Will we start with a shared core build and layer in regional customization options, or adopt a more distributed approach with an independent core for each business segment?

How will the chosen strategy impact the interoperability and reusability of data while maintaining flexibility for the unique needs of each market?

What improvements do we need to create for personas within our system? How can we lean on automation of processes on the front end and back end?

How can we leverage automation to create efficiencies in our build methodology from development to testing?



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Managing change to help ensure positive outcomes

How will we educate staff on upcoming changes to their workflows? How will we define key performance indicators to ensure ROI during and after the rollout phase?

What processes will be established to address challenges if certain capabilities or segments are falling short of expectations?

How can we continue to collect data that informs ongoing improvement of the customer journey and leverage the full potential of next-generation CRM capabilities?



These conversation starters can support open and honest communication across the organization ahead of major decision-making around the future of CRM. With a better understanding of the company's digital capabilities, engagement goals, and customer engagement style, pharma companies can make the most appropriate decision in the short-term and position themselves for sustained success during the next phase of the pharma community's development.

Continue the conversation

Interested in learning more about Deloitte's vision for the future of customer engagement? Or want to discuss which engagement model is better suited to unlock value for your organization?

Reach out to us.

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