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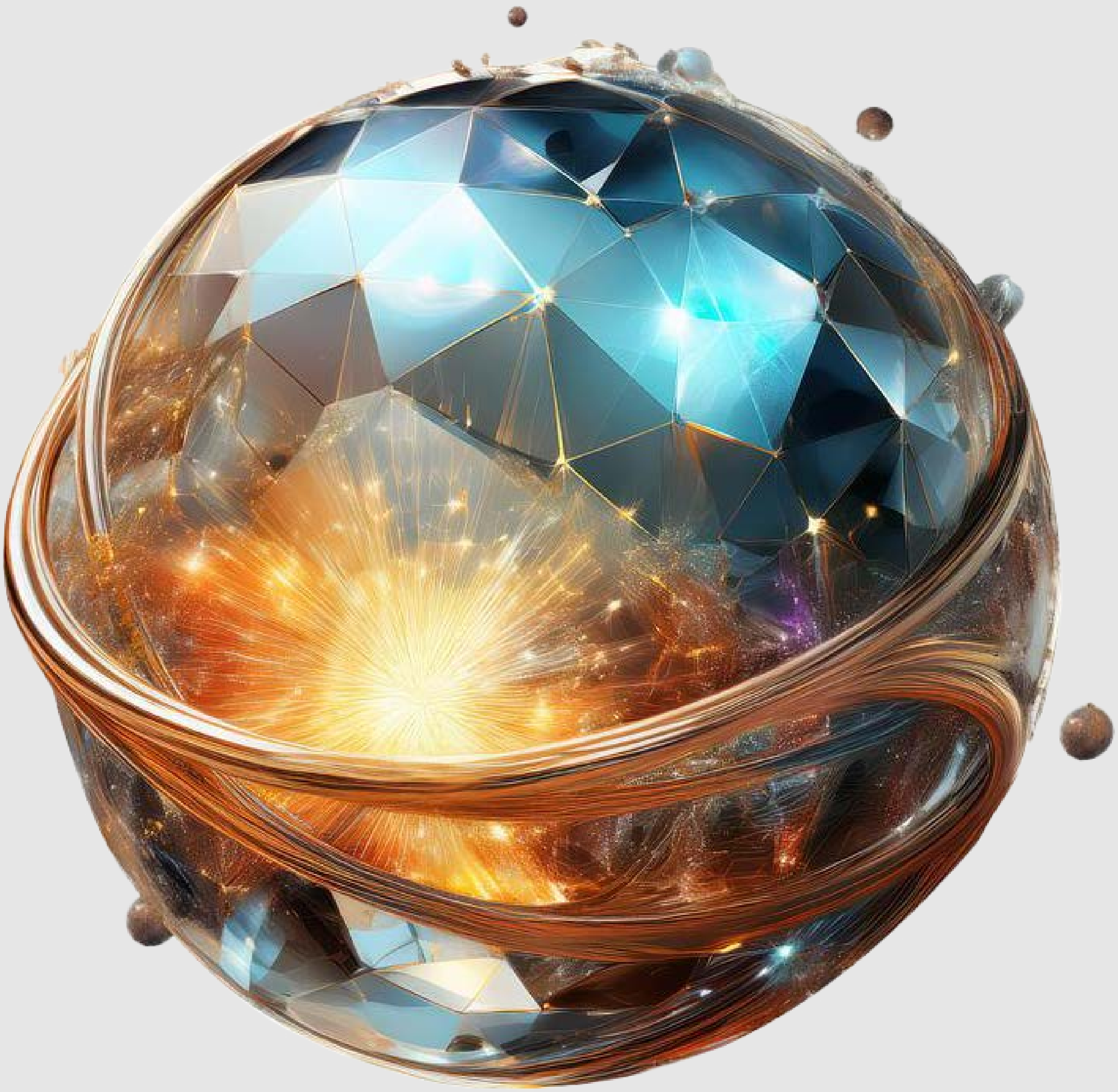

Four organizational readiness tips to prepare for a next-gen CRM platform

In the life sciences industry, even the smallest changes to processes or technologies can require extensive prep and planning. So when a major, game-changing event like the ending of the Veeva-Salesforce CRM partnership comes around, pharmaceutical companies need to take their organizational readiness very seriously if they are going to successfully navigate the transition.

Veeva and Salesforce are already diverging and will fully end support of their legacy joint product offerings in 2030. Now is the time for pharma companies to get ready for adopting a new CRM platform from either Salesforce or Veeva that best suits their unique needs.

Here are the top 4 organizational readiness tips from Deloitte's team of CRM specialists to help pharma companies choose the right path for a seamless transition.

1

SHAPE THE VISION WITH A CLEAR SENSE OF COMPANY IDENTITY:

Organizations will need to be able to articulate their business priorities and define their ideal customer engagement style. For example, some companies may be focused on building deep relationships with large, complex customers, while others might prefer tools that can deliver high-touch, one-to-one engagement with key accounts. By better understanding what the company hopes to achieve, leaders can ask more detailed and relevant questions of prospective technology providers to determine the best options.

2

ASSESS CURRENT CAPABILITIES AND FUTURE GOALS:

Organizations should conduct a robust capability assessment that identifies their strengths, as well as their opportunities for improvement, as they build out their ideal field user journeys and customer engagement touchpoints. A future state impact assessment can provide clarity around adopting specific CRM functionalities, adding or removing elements of the workforce, and optimizing workflow processes to make sure that the vision is rooted in operational feasibility.

3

CONSIDER THE FUTURE STATE OF ENGAGEMENT:

To fully understand what a commitment to either Salesforce or Veeva will entail, companies should consider engaging in "day in the life of..." exercises with each vendor to break down how their platforms will revolutionize the experiences of customers, as well as specific personas within the organization.

4

PREPARE FOR HOLISTIC PEOPLE AND PROCESS TRANSFORMATION:

Success requires active participation from leaders across the enterprise. Organizations should leverage strategically positioned champions to jumpstart the operationalization of the CRM strategy by optimizing critical interaction points, educating fellow team members, and demonstrating consistent engagement with new technologies and processes throughout the transition period.

Completing these steps, with a collaborator like Deloitte who can provide objective insights and advice during this complex process, will help to ensure that companies choose the right technologies and embark on a successful journey toward the future of high-value CRM.

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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