



Three steps for  
executing a successful  
CRM rollout strategy

The time has come for pharmaceutical companies to make a major decision about the future of their CRM capabilities. With Salesforce and Veeva already in the process of going their separate ways, companies have to decide which new CRM products to adopt – and how to best rollout those new platforms to maximize value in the long run.

Let's walk through the three major phases of a successful CRM rollout strategy and take a closer look at some of the important considerations for a smooth and speedy transition.



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# Refine and align

What really needs to be done, and in what order should these tasks be completed?  
Answering this question starts by developing a comprehensive capability map.

## Ask yourself:

# 1

What capabilities can be cut to reduce unnecessary complexity?

# 2

Which useful, foundational field engagement and contact features need to be migrated to the new platform?

# 3

How can we use net-new capabilities in upcoming Salesforce or Veeva products to enhance workflows and eliminate existing pain points?

The answers to these questions will help guide decision-making around which products to adopt in specific areas of the organization and jumpstart the implementation process.



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## Prioritize and sequence

Once the company has completed this assessment, it's time to think about an actionable rollout methodology. Should the new platform be phased in by geography or by product? How will each of these strategies impact ongoing operations and future growth?

A geographic rollout could be beneficial for maintaining common data standards, privacy, and compliance across different regions with their own unique requirements. It might be easier to replicate and scale deployments once a core geography is established.

However, companies that have distinct operations built around multiple core product areas could benefit from a different approach. For example, segmenting rollout by product market stage could allow companies to manage risks in a similar manner across products at the same maturity level, giving them an edge as they move across therapeutic areas or high-value assets.



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## Optimize and deliver

The last step requires an understanding of how to structure the build based on the company's specific requirements. Does the company need a common core build that can be reused in different regions with relatively minor adaptations? Or is each region more or less independent, requiring a smaller, more customized core that can be build, launched, and maintained with relative independence?

A global common core may be best for companies that prioritize common processes, stronger governance, and shared standards for integration. This could result in a faster and more repeatable process, since approximately 80% of the build is the same

across regions, and only 20% of the build is localized to the needs of each market.

From our experience at Deloitte, we believe this is a faster and more manageable way to approach the challenge, but we recognize that each company will have different needs and will require a flexible, adaptable approach to implementation.

Developing and deploying a CRM ecosystem is a step-by-step process that mixes standard features with bespoke customization to produce a tailored, future-ready platform for pharma companies.

# 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 best suited to unlock value for your organization?

## Reach out to us.

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