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Empowering the customer-centric future of pharma: **A roadmap for CRM modernization**

A looming CRM decision is providing the life sciences industry an opportunity to rethink its customer engagement strategy and adopt a platform that embraces AI to drive greater efficiency and effectiveness in healthcare provider relationships.

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THE FUTURE of customer engagement platforms for the life sciences industry is at hand, and it's one that offers a more intelligent, integrated, and customer-centric approach that drives greater efficiencies for pharmaceutical companies and their healthcare provider customers. That is, if companies choose to go there.

The decision by Veeva to move from Salesforce.com to its own Vault CRM platform is forcing its customers to transition off of their current instance by 2030, leaving them with essentially two options. One is to migrate to Veeva's own Vault, which is a new, untested CRM platform. The other is to stay with Salesforce and upgrade to Life Sciences Cloud, an application that integrates artificial intelligence and automation while breaking down long-standing silos to deliver a more customer-oriented approach that better serves healthcare providers and their patients. And it's all delivered on the proven, trusted Salesforce platform with which they are already familiar.

This migration should be viewed as the chance to transform from CRM to an innovative engagement platform within

biotech, pharma, consumer health, MedTech, and related businesses. While it will be a significant undertaking, the migration promises to empower pharma and other life sciences companies with the opportunity to put the customer at the center of their engagements while finding more innovative ways to serve them.

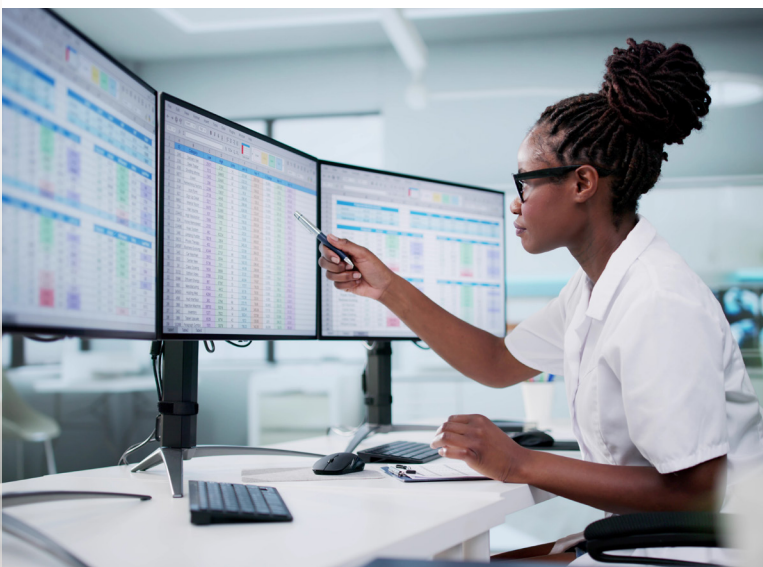
“ This presents a prime opportunity for forward-thinking organizations to reimagine their global strategies and adopt a deeply unified platform to deliver compliant, native agentic AI experiences across the entire healthcare ecosystem.

— **Joe Ferraro**, vice president of product, Life Sciences, Salesforce

“This presents a prime opportunity for forward-thinking organizations to reimagine their global strategies and adopt a deeply unified platform to deliver compliant, native agentic AI experiences across the entire healthcare ecosystem,” says Joe Ferraro, vice president of product, Life Sciences at Salesforce.

The vision for life sciences customer engagement

Like many large organizations, life sciences companies often suffer from disconnected and disparate data sources, which can negatively impact customer experiences and slow the pace of innovation. Growth through mergers, acquisitions, and collaborations compounds the problem, creating more data silos. With the forthcoming CRM transition, life sciences organizations can adopt an integrated platform that simplifies the sharing of data from multiple sources, breaking down silos and enabling better collaboration across the organization.



Healthcare providers (HCPs) juggle packed patient schedules, complex treatment decisions, and administrative burdens such as prior authorizations and formulary restrictions. For critical drug information or reimbursement support, they are often forced to rely on scattered, untimely interactions with pharmaceutical representatives.

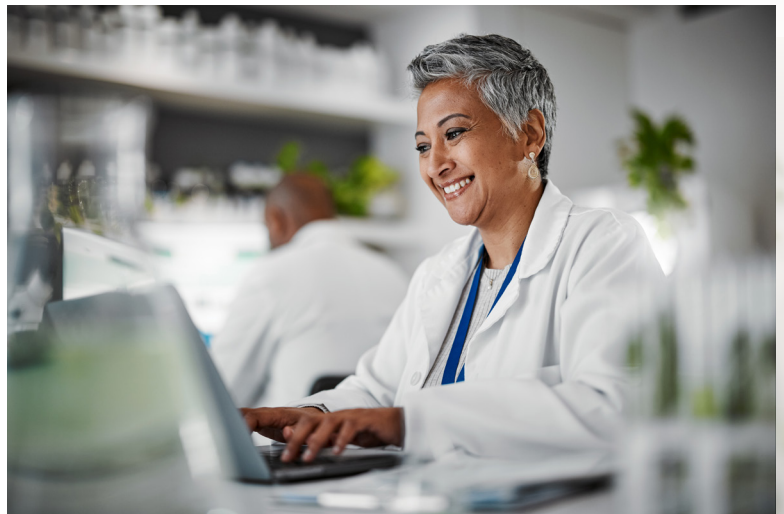
Life Sciences Cloud is changing these types of scenarios by orchestrating seamless, real-time collaboration across field sales representatives, medical science liaisons (MSLs), field reimbursement managers (FRMs), and key account managers (KAMs), ensuring HCPs get the right support precisely when they need it.

Imagine a cardiologist is considering a new therapy for a patient with resistant hypertension but is unsure if the treatment is covered. Instead of waiting days for a representative to follow up, the CRM detects the inquiry submitted via a mobile application and triggers an FRM to provide real-time insurance coverage details and step-by-step prior authorization guidance. Simultaneously, an MSL is looped

in to share the latest clinical data tailored to the cardiologist's patient population. When a field sales rep visits the next day, they can pick up the conversation mid-stream rather than starting from scratch.

By breaking down silos and automating intelligent, customer-focused workflows, Life Sciences Cloud provides for data harmonization, using solutions such as Salesforce Data Cloud to better manage, access, and derive insights from vast amounts of industry data. This reduces the need for constant data integration and movement of data between systems. It also ensures each team member who reaches out to an HCP has access to other members' interactions, resulting in a more informed and personalized approach that ultimately leads to increased customer satisfaction and loyalty. Life sciences companies can also deliver more targeted communications, educational materials, and support programs that resonate with each patient – making patients feel valued and understood.

Couple this data-driven approach with new business processes that embrace AI and automation, and life sciences organizations can revolutionize HCP engagement and patient care. AI tools, including agentic AI, can be used to access and analyze data, surface insights, trigger actions, and offer suggestions aimed at enhancing engagement with HCPs and empowering MSLs, FRMs, and others with new tools. Salesforce's Agentforce, for example, allows life sciences companies to build and deploy autonomous AI agents that work alongside employees, aiding them with tasks like patient benefits validation, clinical trial site selection, and pre- and post-visit summaries, even helping identify patients at risk. AI tools can also lower skill barriers,



helping employees more quickly become proficient in their roles and take on new responsibilities.

In the field, AI-powered agents can analyze data signals and optimize daily activities and engagements for reps of all stripes. As representatives visit an HCP, agentic AI tools can identify all past interactions, such as lunch-and-learn sessions attended or requests for specific efficacy data. With such data at its disposal, an AI agent can then help create a hyper-personalized presentation using approved, compliant content blocks.

Assessing platform options

The looming 2030 deadline provides life sciences organizations with a unique opportunity. To effectively seize it, organizations must methodically assess their options.

First, life sciences organizations must realize this transition isn't simply a technology decision. The choice should be driven by business strategy and structured around where the organization envisions itself in the next five to 10 years.



For instance, by incorporating AI technologies organizations can grow with efficiency and reduce costs, by using AI to automate lower-level tasks. Organizations must consider how processes, human capital, and technology investments will evolve and work together, with AI tools augmenting the workforce to improve customer experience and speed innovation.

Then, it's essential to educate the team on the available options and thoroughly evaluate what providers have to offer. This includes understanding the capabilities of and differences between legacy CRM and next-generation engagement platforms, as well as assessing how the organization currently uses CRM and identifying the most valuable features. Slalom has



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created a scorecard that can help compare vendor pros and cons as well as product capabilities, enabling companies to weigh the options based on criteria that are most important to them.

Another critical task is to inventory the current state of CRM within the organization. This involves identifying any custom applications built on top of Veeva CRM and determining which ones need to be rebuilt on the new platform or replaced with different capabilities. For example, medical information teams often utilize Salesforce Service Cloud to answer questions from HCPs. This connection would need to be recreated in a new CRM or potentially integrated into it – an important consideration.

The future of customer engagement is now

The customer engagement platform decisions life sciences companies make today will be with them for years to come, so it's important to think about how well vendors are positioned to offer continued innovations over time, especially with the AI revolution.

Life sciences organizations need to manage engagement with greater visibility across data sources and garner insights into patient and provider data. Salesforce Life Sciences Cloud leverages the company's deep expertise, best practices, and innovations across industries such as consumer goods, retail, and healthcare – applying these advanced technologies and processes to the life sciences space.

Life Sciences Cloud is an integrated, data-driven, intelligent engagement platform that puts the customer or the patient at the center of engagement and enables life sciences companies to embrace modern technology and a broader ecosystem of solutions while addressing a number of key capabilities including:

- **Increased innovation and modernization:** HCPs and patients increasingly expect a higher degree of ease when interacting with life sciences companies. Companies must be able to deliver hyper-personalized, high-value experiences in this era of the attention economy. This requires moving away from static, manual processes toward more dynamic, intelligent workflows that foster better collaboration and information sharing and strategic customer planning.
- **Orchestrated omnichannel interactions:** HCPs will find value in having a conversation with a life sciences organization that knows who they are, how they want to be communicated with, and what information they need at that moment to provide the best care to their patients. Effectively managing this orchestration between different internal teams and providing efficient, personalized interactions through both digital and face-to-face channels will lead to more cohesive and valuable engagement with HCPs.
- **AI and automation:** AI-powered agents can automate routine, labor-intensive tasks, freeing up time for customer-facing teams to focus on

higher-value, strategic interactions. Autonomous agents can also enable more personalized, optimized, and meaningful engagement with HCPs while driving productivity improvements, such as optimizing daily field representative activities.

- **Data-driven insights:** Technology fit for the future should be able to leverage data from multiple sources—both internal and third-party—to inform more meaningful and tailored interactions while also utilizing AI-powered autonomous agents to automate certain tasks and provide meaningful insights.
- **Ecosystem approach:** No life sciences company should have to go it alone when it comes to customer engagement. Life Sciences Cloud customers benefit from Salesforce's own industry expertise as well as that of its extensive partner ecosystem to develop a comprehensive suite of solutions. For instance, the open Salesforce AppExchange and newly launched AgentExchange have thousands of custom-made applications that solve business problems and further unlock the potential of the platform.

- **Continuous learning and improvement:** Life Sciences Cloud was developed with AI embedded, and its AI capabilities only get better with time. As autonomous agents interact with more data, they continuously improve their decision-making capabilities—empowering life sciences organizations with more insightful analysis, recommendations for HCPs, and useful information for field representatives.

The future of the life sciences industry is centered on building an engagement platform that breaks down organizational silos and improves interactions with HCPs and patients by providing a comprehensive view of patient, provider, and partner activity. Salesforce Life Sciences Cloud is designed to streamline front and middle office processes, using AI and real-time, data-driven insights to enable omnichannel HCP engagement. By applying AI, Salesforce Life Sciences Cloud unlocks the full value

of data, streamlines workflows, and accelerates innovation – from R&D through commercialization.

If your organization could use a hand in assessing your current state and mapping a plan, Slalom, a trusted Salesforce partner, stands ready to help. Slalom's implementation expertise combined with Salesforce's focus on innovation, deep industry expertise, partner ecosystem, and advanced data and AI capabilities will help your organization drive improved efficiency and competitiveness today and well into the future.

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Learn more about Salesforce Life Sciences Cloud and how Slalom can help map your future at slalom.com/salesforce, and get more of the latest industry insights at slalom.com/life-sciences.