



WHITEPAPER

The new era of life sciences CRM

Navigating Veeva's leap from Salesforce for
commercial and medical teams' success

slalom



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Introduction

After nearly a decade of partnership, Veeva Systems announced that it is migrating its flagship customer record management (CRM) product, Veeva CRM, from the Salesforce (force.com) platform to Veeva Vault. Because of a non-compete agreement between Veeva and Salesforce, the latter cannot directly compete against Veeva until September 2025.

Veeva's industry-specific CRM has been an innovator and leader within the industry, meeting the needs of life sciences sales, medical affairs, and marketing teams with functionality like compliant closed-loop marketing, offline access for field reps, and streamlined call reporting. Additionally, with the move of Veeva CRM onto the Vault architecture, Veeva aims to provide a specialized suite of products for the life sciences industry with complimentary products like Vault Promomats, Vault Events, and Veeva OpenData, competing directly with other Salesforce offerings.

By migrating from Salesforce, Veeva customers risk losing pre-built integrations, customizations, and access to complementary Salesforce products like Health Cloud and Marketing Cloud.

In early April 2024, [Salesforce announced an expanded partnership with IQVIA](#), bringing together IQVIA's Orchestrated Customer Engagement (OCE) with Salesforce's Life Sciences Cloud. IQVIA's OCE platform is built on force.com and has the capabilities pharmaceutical companies need for their tactical commercial execution. This partnership will help Salesforce reach parity with Veeva CRM features and remove doubts from customers about what is possible on their competing Life Sciences Cloud. The new functions are slated to be available after the non-compete with Veeva expires in September 2025.

These changes pose complex decisions for Salesforce/Veeva customers. They must consider either staying on force.com and seeing how the Salesforce and IQVIA partnership will fill the gap or migrating to Veeva Vault, which will require reconstructing their technology architecture. Alternatively, customers also have the option to explore other CRM and technology vendors that may be better suited to their needs.



Trends in the go-to-market landscape

Concurrent with Veeva's move from force.com, the landscape for life sciences' field representatives is transforming, particularly in its go-to-market strategies. This shift goes beyond technological changes to the strategies and methodologies used by the field reps to engage with customers. When reconceptualizing the technology architecture and, in turn, the go-to-market strategy, there are several trends shaping the industry's landscape to consider, including:

Digital engagement

Stringent regulations and changing preferences of HCPs have resulted in declining in-person access and a [shift towards digital channels](#), such as virtual meetings, webinars, and interactive content delivery.

Data, analytics, and AI

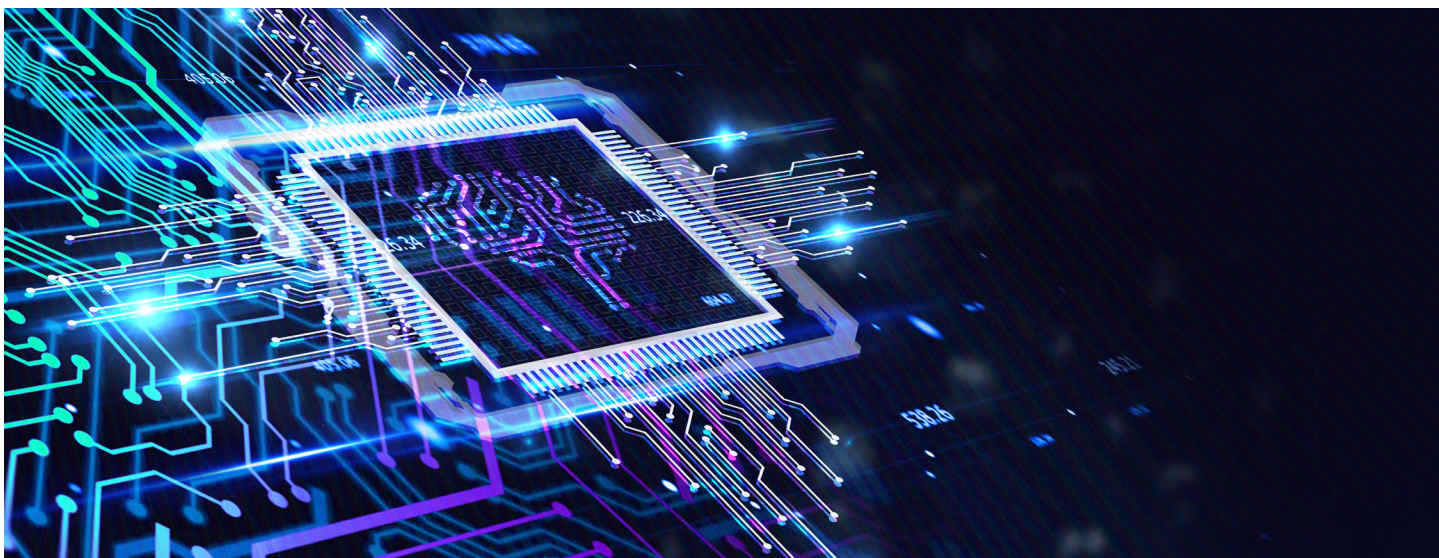
Data and analytics equip sales reps with customers' preferences, prescribing patterns, and unique needs. AI has started to play a pivotal role in [analyzing vast datasets](#) to identify trends, predict behaviors, and personalize customer engagement strategies.

Omnichannel marketing

A customer-centric approach with a unified and consistent brand experience enables reps to deliver more relevant and personalized content across various platforms.

Growing importance of education

With [ten total regulatory decisions on cell and gene therapies in 2023](#) and more launches of complex products expected in the near future, reps and other customer-facing teams need to upskill in the therapeutic areas and understand the reimbursement models and market access strategies to demonstrate the cost-effectiveness of their products and offer valuable insights during interactions.



Stakeholder alignment

With the increasing need for specialized expertise, customer-facing roles in medical, commercial, and patient services have diversified over the years. However, multiple stakeholders from various functions are now engaging with a single customer, and life sciences organizations are moving towards integrated customer-facing teams that collaborate more closely to deliver a consistent and cohesive experience for customers.

Emerging technologies

Organizations are embracing various new technologies to support new commercial approaches.

- AI-enabled sales tools swiftly provide relevant insights during customer interactions.
- Predictive analytics detect adherence risks and tailor patient outreach.
- Automation of repetitive administrative tasks improves field productivity and frees up resources.
- IoT connectivity and wearables deliver real-world evidence to commercial teams.
- Augmented and virtual reality enables immersive product demonstrations and medical education.
- Natural language processing analyzes unstructured data from contact centers and social media.

Life sciences organizations should consider how these trends and new technologies are changing the industry's landscape. This time of transition is prime for reimagining technology-enabled commercial models to align with the industry's future and customer expectations. So, rather than simply recreating the existing CRM capabilities, there's an excellent opportunity to realize desired capabilities in coordination with the organization's overall corporate and field force strategy. Having a clear, aligned vision here will make evaluating the vendor options for the best fit an easier task.



An opportunity for reconceptualization

While Veeva offers a comprehensive suite for CRM, content management, and data, Salesforce has a history of continuous expansion, and there is potential for them to introduce new solutions in the next few years, especially after their announcement of the partnership with IQVIA. However, looking beyond Salesforce and Veeva opens the ecosystem. To understand what capabilities are needed and to invest in the right tools, leaders should create a capability map benchmarking solutions against desired functionality in the technology architecture, total cost of ownership (TCO), and ease of integration into the organization's strategy and culture.

Functionality in the technology architecture

When looking at the system landscape of a commercial and medical operations team, there are quite a number of products that are typically utilized. While the LS Cloud product isn't formally available, we anticipate it will be an end-to-end platform offering seamless integration with one or more of these functionalities. Here are examples of tools to consider when putting together a vision for enablement and functionality:

Capability	Functionality	Tool options
Customer relationship management	Used by field sales, field medical, field reimbursement, and market access teams to track interactions with prescribers and medical personnel	• Veeva Vault CRM • IQVIA OCE & Life Sciences Cloud • Pitcher CRM
Master data management	Handles change requests and updates for customer master data from multiple data providers and reconciles differences with rules engine	• Veeva Network • Salesforce Data Cloud • IQVIA Onekey • Reltio
Event management and transfer of value system	Tracks the logistics, budgets, speaker management, and event management for the organization	• Veeva Events Management • C-Vent
Alignment and incentive system	Uses historical data and predictive models to create effective territories and incentive programs for field teams	• TerrAlign • ZS Assoc. Javelin • Veeva Align
Contact center management	Handles inbound requests from prescribers and others and provides timely responses via multiple channels such as phone, chat, email, websites, and social media	• Veeva MedInquiry • Salesforce Service Cloud • Komodo MIC
Patient service management	Manages access, adherence, and advocacy for patients by on-boarding them, verifying benefits to assess financial need, and enrolling them in follow-ups or reminders for appointments	• Salesforce Health Cloud • Komodo Care Connect • Deloitte Converge Health • Oracle Health Cloud
Marketing automation	Communicates with prescribers, patients, and consumers through multiple channels (email, text, social media, etc.), enters them into decision-tree customers journeys at relevant times, and monitors the external conversation to provide timely, compliant information	• Adobe Experience Cloud • Salesforce Marketing Cloud • Oracle Eloqua
Digital asset management	Ensures compliance of external-facing documents, websites, and presentations with store policies and facilitates review process with audit trail and workflow alerts	• Veeva Vault Promomats or MedComms • Sharepoint
Websites and portals	Allows registered users to access key educational and promotional materials	• Salesforce Community Cloud
Business intelligence	Captures data from multiple sources in the organization and uses it to analyze trends and track progress toward goals	• Tableau Analytic Cloud • Veeva Nitro and MyInsights • Power BI • Qlik Reporting • Domo

Total cost of ownership

The TCO has multiple components that life sciences organizations should evaluate. To compare the capability and vendor options effectively, organizations should build detailed TCO models across implementation phases. TCO should be weighed against potential benefits, such as advanced analytics capabilities, which could identify 10% more at-risk patients to improve retention, and AI-assisted sales reps, which could have 20% higher physician engagement. These potential benefits should factor into product selection. Here are some questions to ask when evaluating a product's fit:

Total cost of ownership considerations	
License cost per user or use	• How many users need the tool? • Is there tiered access for light, regular, and power users? • Are there volume discounts or caps for use?
Cost of activation	• What is the project cost to stand up the tool, and is it done in-house or outsourced? • Can this be used "out-of-the-box," or is there an investment of time and money to fit the business needs? • Will customization be needed for unique processes or business advantage? • What is the cost to retire the legacy system?
Ongoing service cost	• Does the tool have sufficient technical support? • What is the cost of internal Tier 1 and Tier 2 support? • Is the technology well-adopted, and is there a readily available workforce that can support it (e.g., Salesforce admin)?
End-user adoption	• Is the tool intuitive and user-friendly? • Is there a significant change management undertaking when installing or updating the tool? • What training investment will be needed?
Ease of integration	• Are there well-documented open APIs and pre-configured connectors? • What is the cost of the middleware integration technology, or does it have direct integration? • Is there clear guidance on data creation, update, and deletion rules?



Organizational strategy and culture

A company's overall strategic goals and culture inform its appetite for innovation and optimal technology strategy. These factors can differ depending on the organization's size. For example, large life sciences organizations often have ingrained processes requiring evolution, while small biotech companies desire leading-edge solutions but face constraints on investment.

Furthermore, rather than size alone, there are some key considerations to successfully navigate the complexities of transformation and achieve desired outcomes within an organization's unique culture. One of the most critical factors is the degree to which an organization is open to emerging technologies such as AI and their potential for transformation. Additionally, commercial models must be customer-centric and focus on digital engagement rather than transactional sales. It is also important to evaluate existing go-to-market strategies and required enabling capabilities to ensure they align with the organization's goals, as well as assess the IT mindset on cloud adoption, open architecture, and integration agility.

These strategy and cultural aspects will guide technology decisions to balance innovation and pragmatism. Partners who understand long-term vision yet ground recommendations in current realities are invaluable.



Activating your strategic roadmap

While the Veeva separation from Salesforce poses challenges, there are great possibilities for strategic reinvention. Life sciences organizations should take this transition as a catalyst to reimagine commercial models and assess solutions against a future vision. Though a tactical migration may offer a short-term solution, this shift provides an opportunity for long-term value. Organizations can leapfrog competitors through strategic automation, advanced analytics, and AI. Companies that get this technology transformation right will sustain their competitive advantage for the next decade.

If your organization is currently at this crossroads and you're eager to capitalize on this transformation opportunity, Slalom can help. Whether you're interested in evaluating your current state, benchmarking solutions, building a strategic roadmap, or getting straight into product implementation—we have the experts who can partner with you to bring your future-state vision to life.

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slalom.com/life-sciences