Veeva CRM Migration Playbook

## Part 2 – Strategic Solutioning & Readiness for Your CRM Migration

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As your CRM transformation gains momentum, the next phase shifts from foundational thinking to structured action. You've already aligned on your strategic objectives, analyzed your current CRM setup, and established a strong data governance baseline (If you haven't done so, please check our Playbook Part 1). Now it's time to make key decisions — ones that will shape the direction, pace, and long-term success of your CRM evolution.

This phase helps your organization confidently evaluate potential solutions, plan a smooth and compliant rollout, and prepare users to fully embrace what comes next. This isn't just about execution — it's about being truly ready for what's next.

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Step 4:

Strategic Platform Evaluation & Solution Selection
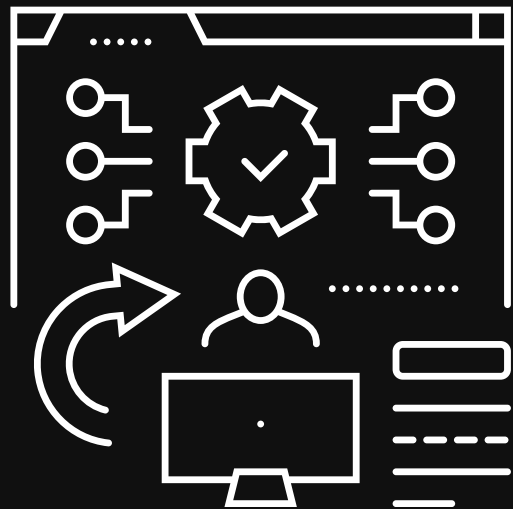
This is where your earlier work — strategic goals, compliance needs, user pain points — becomes the lens through which you evaluate future CRM platforms. It's a critical decision point that requires structure, objectivity, and a long-term perspective.

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Ideas for action:

↗   Develop a comprehensive RFI/RFP: Outline your strategic objectives, compliance obligations, integration requirements, scalability needs, and desired analytics capabilities. Use this document to guide consistent vendor conversations and ensure alignment with your future vision.

↗   Evaluate potential CRM platforms through the lens of your defined business and technical requirements: Review how well each option aligns with your strategic objectives, integration landscape, compliance needs, and user experience goals. Look closely at how each platform compares to your current setup — and what might need to be reconfigured or reimagined, and the broader implications for your data model, processes, and organizational change effort.

↗   Conduct thorough vendor and partner due diligence: Look beyond demos to examine methodologies, pharma references, and post-go-live support models. Peer feedback can be especially useful in evaluating implementation success and adaptability.

↗   Build a multi-year total cost of ownership (TCO) comparison: Include licensing, configuration, data migration, integrations, training, and long-term support. A well-rounded cost model helps surface hidden risks and supports informed decision-making.
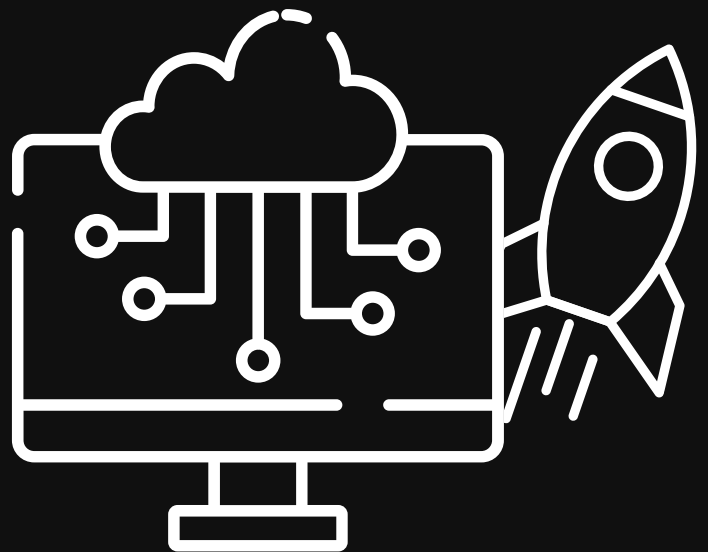
Why this step is important:

A rigorous, objective evaluation process, grounded in your pharma-specific needs, ensures that the platform and partner you select truly align with your long-term strategic goals. This decision can significantly influence future scalability, compliance, and ROI.

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Step 5:

Comprehensive Migration & Deployment Planning

Once your path is set, it's time to map out the migration in detail — including technical architecture, business process impacts, and rollout sequencing. Planning now helps ensure an efficient, compliant, and low-disruption implementation.

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Ideas for action:

↗ Outline a phased rollout plan tailored to your business model: Create a realistic migration timeline — possibly using a phased deployment to avoid disrupting critical operations.

↗ Define your future technical architecture and integration approach: Identify key integration points, API strategies, and security models. Make sure your integration strategy aligns with your data retention, compliance, and audit trail policies.

↗ Plan internal and external resource allocation: Identify key roles like project leads, data specialists, trainers, and developers early. Address potential skill gaps before execution begins.

↗ Create a RACI matrix for critical activities: Map responsibilities across teams for migration steps like data cleansing, testing, and training. This adds clarity and accelerates decision-making during high-pressure phases.

↗ Design a multi-phase testing strategy: Plan for system, integration, performance, and User Acceptance Testing (UAT). Involve business users early to test real-world scenarios and avoid adoption blockers later.

Why this step is important:

This is where your strategic intent becomes a concrete execution plan. By defining architecture, governance, resources, and risks upfront, you help reduce business disruption, align cross-functional stakeholders, and create the structure necessary for a technically sound and timely rollout.

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Step 6:

Cultivating Adoption Through Change Management & Training
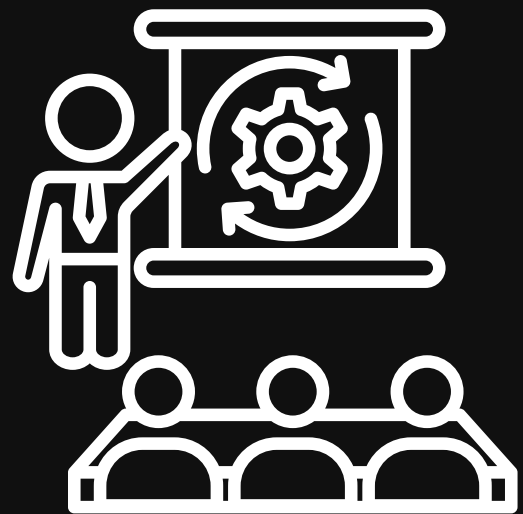
The success of your new CRM hinges on your people — how well they understand, accept, and embrace the change. Change management and training are the bridge between system rollout and real business value.

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Ideas for action:

↗ Craft a proactive communication plan for all stakeholders: Share updates regularly, highlighting benefits, milestones, and upcoming changes. Use varied formats and channels to keep engagement high.

↗ Design training programs tailored to each user role and workflow: Combine e-learning, live sessions, and job aids to meet diverse learning needs. Emphasize what's changing and why it matters for users' day-to-day work.

↗ Build a network of change champions across departments or regions: Select influential users to act as early testers and peer mentors. Their feedback and advocacy can smooth adoption and flag issues before go-live.

↗ Establish post-launch support mechanisms and feedback loops: Create easy access to help (e.g., help desks, super users) and collect user input early. Continuous optimization helps boost satisfaction and usage.

↗ Monitor adoption metrics and revisit impact KPIs: Track platform usage and revisit the goals defined in Step 1. Use these insights to demonstrate business value and guide further enhancements.

Why this step is important:

A new CRM only delivers value if it's actually used. Effective change management — started early, tailored to real user needs, and supported by clear communication — helps reduce resistance, speed up adoption, and ensure long-term system success.

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Your Next Thoughts

You've now worked through the full strategic journey — from defining your long-term vision and analyzing your current CRM landscape, to selecting the right solution and preparing your organization for change. With these foundational and planning phases complete, you're no longer at the beginning — you're ready to launch.

Now is the time to turn intention into execution.
As you prepare to activate your migration, consider:
- Which parts of your organization are ready to move forward today — and which may need more alignment or support?
- Is your platform evaluation process clearly documented and agreed upon by all key stakeholders?
- Are you confident in your ability to manage integration complexity, data readiness, and cross-functional collaboration?
- Do you have the structures in place — from governance to training — to ensure a smooth rollout and strong adoption?

The answers to these questions will shape your organization's CRM transformation — not just the system you select, but how fully your teams embrace and benefit from it.

At Craftware, we specialize in helping life sciences companies navigate this transformation with clarity and confidence. Whether you need support with vendor evaluation, technical planning, organizational readiness, or full program execution — we're here to help.

Let's make your CRM migration a strategic success — not just a system change, but a business evolution.

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Let's Navigate the Journey Together

At Craftware, we understand the complexities of CRM transformation in life sciences. Whether you're evaluating platforms, shaping your rollout roadmap, or preparing your teams for change — we're here to support you at every stage. Contact us:

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