Choosing the right CRM for pharma

Building an unbiased business case for CEP selection in life sciences

The dissolution of the long-standing Veeva-Salesforce partnership marks a pivotal moment in the life sciences industry. But could the end of an era bring about a transformative new chapter for your organization?

The Veeva-Salesforce split, coupled with the rise of niche customer engagement platforms (CEPs), has created an inflection point in the life sciences industry. After years of reliance on a joint solution, companies must now reconsider both their technology toolset and their engagement strategy.

Regardless of their choice of platform—be it Veeva, Salesforce or an emerging player—this decision will have a long-lasting and wide-ranging impact on the business for the next decade or more. As the foundation of all stakeholder coordination, life sciences companies must get it right, not just as a matter of cost, but to ensure seamless compliance and efficient operations.

With the full launch of the Salesforce Life Sciences Cloud targeted for Q3 2025, companies must begin to consider their options and examine the implications of their choice across the business. In this article, our life sciences executives and enterprise platform experts come together to provide a comprehensive framework to help companies assess their CRM options and make the optimal choice for their business.

A catalyst for change, an opportunity for progress

The Veeva-Salesforce split will be a source of both opportunity and challenges for pharma and life sciences companies.

On one hand, the separation will increase competition, which can accelerate innovation and lead to valuable differentiators, such as specialized features and customizations. This could allow companies to align better with a changing product portfolio or go-to-market strategy.

On the other, migration of any kind will likely involve complex data and integration challenges. For pharma and life sciences companies, there is the added pressure to maintain constant regulatory compliance throughout this process, underscoring the need for a comprehensive migration strategy.

With investments easily stretching into the tens of millions, selecting a new CRM is not just about choosing a platform but about reevaluating the entire enterprise-level strategy and the surrounding processes and systems.

Embracing a "lift and shift" approach without conducting a strategic reassessment can lead to missed opportunities to improve both internal operations and customer experiences, while also replicating existing inefficiencies and carrying technical debts forward. By the same token, jumping too quickly into a new system without a firm understanding of the surrounding processes and a clear change management strategy can be a source of tremendous complexity and cost.

Instead, companies should treat this event as an impetus for reinvention. It's an opportunity to reevaluate the current system and consider the art of the possible—using the CRM as a source of innovation, a strategic tool to help enhance decision-making, and an engine for long-term growth.

Selecting the optimal CRM partner: Key considerations across five core categories

What are the most critical aspects to consider during this transition? Based on our work in both the CRM space and the life sciences industry, we have identified five key categories and provide a list of considerations and best practices to guide data-driven decisions and prevent costly misalignments.

Strategic alignment

Goal and priority alignment

Does the platform provide the capabilities to enable our core business goals?

Customization

Does the CRM offer specific features, integrations or configurations that align with our strategic priorities and workflow requirements?

Ecosystem integration

Can the tool integrate with the existing tech stack? Will its addition help maximize existing investments?

Value tracking

Does the platform provide an objective way to track core metrics and KPIs?

Key tasks

- Business case development
- Tool evaluation and assessment
- Stakeholder interviews
- Workflow mapping
- Metric assessment

Compliance

Regulatory compliance

Does the platform include predefined workflows that align with industry standards to prevent non-compliance issues?

Continuity

Does the tool guarantee continuous operation and compliance, even during migration, updates or system downtime?

Data security

How does the CRM ensure the security of sensitive data, such as patient or clinical trial information, including during migration?

Audit support

Does the CRM provide robust audit trail functionality to meet long-term compliance requirements?

Key tasks

- Regulatory assessment
- Compliance strategy and processes
- Data security and privacy assessment
- Secure data migration
- Failover system development
- Compliance training

Future-proofing

Scalability

Can the platform adapt to evolving business needs, such as new regulations, market expansions, technological advancements and additional channel integrations?

Technology integration

Does the platform support the use of emerging and advancing technologies, such as generative AI?

Innovation

Has the provider made consistent investments to enable ongoing innovation to support new features and services to keep pace with market needs?

Key tasks

- Scalability assessment
- Technology integration assessment
- Data migration
- Customization and configuration
- Integration assessment

Change management

Training

Does the CRM partner offer a robust training program for different roles, teams and regions to foster strong adoption? What tools and resources are provided by the vendor during the transition period and beyond?

User experience

Does the CRM have a user experience that employees will find intuitive and engaging?

Required skills

Will the CRM require employees to develop new technical or analytical skills?

Process redesign

Will implementation require significant redesign or related processes across core functions?

Key tasks

- Change management services
- Stakeholder engagement
- Readiness assessment
- Workforce training and development
- Business process redesign
- Resistance management
- Employee communication and rollout

Cost

Total cost of ownership (TCO)

What is the estimated upfront implementation cost, as well as ongoing costs, such as licensing and maintenance? What are the estimated "hidden" costs associated with implementation, such as training, change management, data migration or the future migration of connected modules (e.g., service, marketing or content systems)? How significant are costs when scaling across different regions, or in the case of an acquisition?

Cost benefit analysis

Can the cost of the platform be offset by value generated from the investment, be it in the form of productivity gains, lower risk, growth or improved loyalty?

Missed opportunities

What business opportunities or operational transformations might be missed by not adopting the platform?

Key tasks

- TCO analysis
- Implementation cost assessment
- Cost benefit analysis
- Benchmarking and market research

Conclusion

As pharma and life sciences companies face this critical inflection point, the choices they make today will shape their business trajectory for years to come. Whether selecting Veeva, Salesforce or a niche platform, the key lies in aligning technology decisions with broader organizational goals.

By leveraging strategic insights and a robust evaluation framework, companies can navigate this transformative era with confidence, ensuring seamless operations, compliance and stakeholder engagement for years to come.

For more information about how Cognizant's life sciences and enterprise process consulting teams can help your organization leverage the opportunities that will arise from this change, please visit the life sciences section of our website.