

# QUO VADIS PHARMA CRM?

What will become  
of Veeva, Salesforce,  
OCE & Co.?



The CRM market is at a crossroads. Where is the journey heading and what do you need to consider?

## Quo Vadis Pharma CRM?



**Noel Wack**

Innovating digital marketing all day long

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The CRM market in the life sciences sector has been remarkably stable. For over a decade, the partnership between Veeva and Salesforce provided a reliable foundation for the digital ecosystems of pharmaceutical companies.

As Salesforce's largest licensee, Veeva has developed comprehensive solutions for the pharmaceutical and biotech industry and has quickly become the dominant player in the CRM market. At the same time, the importance of CRM for digital marketing in general has continued to grow.

Veeva customers are now forced to ponder the future of their ecosystem. As the partnership between Veeva Systems and Salesforce comes to an end in September 2025, Veeva customers are now facing considerable uncertainty and challenges, particularly regarding the previously leading CRM system "Veeva CRM."

Salesforce's announcement that they will license IQVIA's successful OCE-Personal and OCE-Digital and come up with their own solution for the life sciences industry—Salesforce Life Sciences Cloud—has heated up the competition further.

### **CRM migration—sooner or later it affects (almost) everyone**

IQVIA and especially Veeva Systems are the largest CRM providers in the pharmaceutical industry. Large pharmaceutical companies predominantly work with one of the two providers.

In other words, most major pharmaceutical companies will have to plan and implement a CRM migration in the next 5 years.

What impact will these changes have? Who needs to act now, and how? What options are even available?

## Market and market development

The global CRM market has grown considerably in recent years and is expected to reach a value of USD 163 billion by 2030 [1]. The pharmaceutical industry is predicted to have a significant share of USD 34 billion [2], as effective CRM systems are crucial for managing customer relationships, marketing strategies and compliance—especially in the life sciences sector.

A platform switch can significantly impact a company's efficiency and productivity across different divisions. Two main factors complicate an easy migration: deep integration of the CRM with adjacent platforms, and a high degree of customization. Almost all companies have intensively adapted their CRM to their needs in recent years, implemented individual configurations and developed additional software solutions that have been integrated as seamlessly as possible.

Both Veeva and Salesforce promise a clean and simple migration of data, content and configurations, either from Veeva CRM to the new Veeva solution "Vault CRM" or from OCE to Salesforce Life Sciences Cloud. This may be true for most data, but not for all of it. Individual configurations, integrations in third-party systems and proprietary solutions cannot be easily switched or exported. Where the unavoidable migration should go needs to be carefully considered. So, what are the alternatives?

## Veeva's new platform: Vault CRM

Veeva has already begun taking steps to migrate its customers to the new "Vault CRM." This platform promises improved integration and enhanced functionality to meet the specific needs of the pharmaceutical industry. Vault CRM provides a centralized solution that improves efficiency and compliance while leveraging the existing strengths of Veeva Vault. The challenge for Veeva lies in convincing existing customers of the benefits of its new solution. Veeva is particularly counting on the support of their partner landscape, which will have to provide critical support during the migration.

## Benefits of Vault CRM

- **Integration and data management:** Vault CRM seamlessly integrates with other Veeva products and enables centralized data management. This streamlines management of customer data, clinical data and marketing materials.
- **Compliance:** The platform provides especially comprehensive support for compliance with regulatory requirements, which is particularly important in the pharmaceutical industry. Veeva Vault is clearly the most powerful product on this market. Core advantage: established approval processes do not need to be modified.
- **User-friendliness:** Vault CRM is designed to improve the user experience and increase workflow efficiency. Nothing should change for the sales force, as interface and functions should be retained in full. Ideally, this will avoid extensive trainings and speed up adoption within the company.

## Salesforce + OCE = Life Sciences Cloud

On the opposing side, Salesforce has licensed IQVIA's OCE platform and plans to integrate it into their new Life Sciences Cloud. This also requires extensive modifications and migrations for existing customers. Switching platforms always brings risks and uncertainty, particularly when it comes to data migration, training and adapting to new systems. However, Salesforce has the opportunity to rethink data management and customer engagement using industry knowledge from other areas. Of course, it is difficult to make valid predictions here, as Life Sciences Cloud is still being actively developed, which is obviously where the greatest risk lies.

## Benefits of Life Sciences Cloud

- **Flexibility and scalability:** Salesforce's Life Sciences Cloud offers flexible and scalable solutions tailored to the pharmaceutical sector, with the added benefit of experience from many other sectors and industries.
- **Innovation:** By integrating AI and machine learning, companies can pursue innovative approaches in customer management and marketing. While Veeva relies on its partners to develop AI solutions, Salesforce takes a different approach here.
- **Integrations:** Direct integrations with Life Sciences Cloud and Salesforce Marketing Cloud offer a lot of potential and extensive opportunities for customer engagement.
- **Content:** Created content will not have to be adapted or migrated again but will work seamlessly on end devices.

## Significance for customers

The CRM market is undergoing major changes and lacks certainty. The only thing that is certain is that time is running out for the many companies directly affected by the changes. Changing their current CRM infrastructure is unavoidable, except for those who use other CRM systems like Ysura or Exeevo, Pharmakon, Vtiger, Hubspot and others. Everyone else will have to adapt to extensive changes. Changes, which not only incur technical challenges, but also the need for strategic considerations. Companies need to assess which platform best meets their specific requirements and how they can make the transition as smooth as possible. After all, this will determine how large the company's investment really needs to be. „Business continuity“ is the order of the day and the basis of all considerations. Planning errors quickly become expensive—for example, if the sales force suddenly no longer has access to essential software or if content cannot be distributed because it is not compatible or trackable.

## Challenges and risks

- **Data migration:** Transferring large amounts of data to new systems carries the risk of data loss and integrity problems. How can fields and data be mapped? How can data be validated once migration is complete?
- **Content migration:** A lot of time and money has been invested into existing content; creating new content can quickly multiply migration costs. Can content be converted with little effort? Is seamless tracking guaranteed?
- **Training:** Employees must be comprehensively trained to use the new systems effectively. How extensive are training measures and how can they be carried out without interrupting daily business?

- **Integrations:** Whether it's content creation, tracking, additional engagement channels or simple convenience features—without a clear overview of your current system, there is a risk of integrations breaking during migration—with difficult to calculate consequences. Which integrations are essential and must be available immediately after migration? Can integrations be reconfigured, or do they need to be developed a new?

## Opportunities and advantages

- **Improved functionality:** New CRM platforms offer enhanced features that can increase efficiency and productivity. A new and clean architecture can lead to noticeable performance improvements. New features can be implemented quickly, as systems do not yet have a high degree of individualization, which makes the development of generic solutions more complex.
- **Better customer insights:** Through advanced analytics and reporting—also supported by artificial intelligence—companies can gain deeper insights into the behavior and needs of their customers and develop a deeper understanding of their customer journeys—a core prerequisite for implementing a successful omnichannel strategy.
- **Consolidation:** A new CRM offers the opportunity to get rid of legacy issues, rethink established but inefficient processes, homogenize data and tidy up integrations. With good planning, this creates an ecosystem that maintains continuity, adds new capabilities and reduces complexity and support costs for the digital infrastructure.

## What happens next?

The separation of Veeva and Salesforce marks a significant change in the pharma CRM sector. Companies are faced with the challenge of deciding on a new CRM platform quickly to have enough time to efficiently manage the transformation. Depending on organization size, a period of 3-5 years is already very tight. While this process brings uncertainties and major technical and administrative challenges, it also offers opportunities for a fresh start, technical innovation and ultimately for improving customer relationships through smarter use of data and new customer engagement opportunities.

**Our recommendation is to get to grips with the possibilities and pitfalls as quickly as possible and to ask the right questions early on.**

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[1] <https://www.grandviewresearch.com/press-release/global-customer-relationship-management-crm-market>

[2] <https://market.us/report/healthcare-crm-market/>