

# The SMB Guide to Vault CRM: Minimize Disruption and Accelerate Innovation



# SMB biopharmas accelerate commercial innovation

More than [125 biopharmas have already implemented Veeva Vault CRM](#) to drive next-generation customer engagement. This transformation is not exclusive to large enterprises; a significant portion are small and midsize businesses (SMBs) looking to unlock innovation for commercial efficiency and effectiveness.

While every company journey is unique, SMBs share operational similarities that can help streamline the transition. Lean teams possess the agility to simplify workflows and bypass common technical bottlenecks that often slow down larger organizations. Smaller teams can fundamentally redesign and optimize their entire commercial approach, quickly adapting to new ways of working.

Grounded in industry peers' experiences, this guide provides a practical roadmap for SMB biopharma companies navigating the upgrade to Vault CRM. Learn best practices for a rapid go-live without disrupting field operations and leverage customer recommendations for before, during, and after migration. Start innovating sooner to gain a long-term competitive edge.

## Seizing the SMB strategic advantage: Why move to Vault CRM now?

For SMBs, the CRM decision is a strategic choice that directly impacts go-to-market execution and treatment delivery to patients. While it may be tempting to delay it as long as current systems remain functional, waiting risks a future bottleneck in accessing innovation. Upgrading to [Vault CRM](#) now fast-tracks access to next-generation capabilities based on your specific needs with 'white-glove' attention from Veeva's migration resources and establishes a scalable foundation for accelerated expansion and elevated HCP engagement.



**The Life Sciences CRM Decision: Key Advantages of Vault CRM**

Get the eBook

Existing SMB customers highlight key advantages to migrating to Vault CRM now:

## Why SMBs are moving to Vault CRM now

### Drivers

### SMB strategic advantages

### Peer proof points

#### A purpose-built, unified technology foundation

Connecting commercial, medical, and R&D on the life sciences-specific **Vault platform** improves data quality and cross-functional visibility to accelerate the path from trial to treatment.

*"Miltenyi Biomedicine is dedicated to advancing personalized cell and gene therapy. We chose to partner with Veeva on the Vault Platform, a unified platform across Commercial, R&D, and Medical to support critical product launches and accelerate innovation."*

Sandra Kotnyek, Global Digital Ecosystem Director at Miltenyi Biomedicine GmbH

#### Immediate access to innovation

Moving early to Vault CRM puts next-generation tools like **orchestration, dynamic targeting, and AI agents** into the hands of commercial teams sooner to increase productivity and maximize engagement.

*"I am excited that we can implement innovation very quickly after our migration, such as the account profiling capability within the platform, to enable the field team to do their jobs more effectively."*

Debbie Young, Multichannel Strategy and Customer Insights Director at Otsuka Europe

#### Advanced, omnichannel capabilities

Vault CRM provides the foundation for **omnichannel engagement**, supporting growth across diverse customer touchpoints and personalized experiences. Using both non-personal and field channels leads to more effective campaigns.

*"Veeva's move into digital marketing is a game changer – for the first time, we are truly bridging the gap between marketing and sales. With Campaign Manager, the field force becomes active drivers of our marketing strategy."*

Joseph Bejjani, CIO at Idorsia Pharmaceuticals

#### Agility as a catalyst for growth

SMBs are uniquely positioned to standardize tools and processes rapidly to support global expansion. With Vault CRM, **emerging biotechs** can meet aggressive launch timelines without compromising on compliance.

*"Combining Veeva's cutting-edge solutions with deep industry knowledge creates the ideal platform for our innovation and long-term sustainable growth."*

Francesco Masi, Chief Commercial Officer at Aboca

#### The 'clean slate' advantage

Smaller organizations tend to have a less complex technical footprint with fewer legacy interdependencies. This **simpler tech environment** allows for a faster move to Vault CRM with significantly lower risk

*"Our decision to consolidate technology on Vault CRM was based on three core principles; enabling business excellence, prioritizing platform integration, and safeguarding simplicity."*

Raimond Jähn, Vice President Information Technology at BioNTech SE

#### Enhanced financial efficiency

Consolidating on the Vault Platform reduces future costs by replacing a 'patchwork' of point solutions with a streamlined architecture.

*"Transitioning to Vault CRM is a strategic investment that combines innovation with financial responsibility. By simplifying our technology landscape and improving data quality, we reduce complexity and secure long-term cost efficiencies."*

Fabian Raschke, Chief Financial Officer at Grünenthal

# The five phases of Vault CRM migration

The move to Vault CRM is a structured journey that typically spans two to five months for SMBs. It is organized into five distinct phases designed to ensure a seamless shift while maintaining operational continuity. This journey begins with a comprehensive assessment of your existing setup, customizations, and integrations to prepare for a successful data transfer. Following the migration of your data model and configurations, the process enters an optimization stage where connectors and re-customizations are refined and rigorously tested. The transition culminates in a focused go-live weekend, after which your organization can enhance the platform with new capabilities such as key account management, call center, inside sales, and advanced marketing automation.

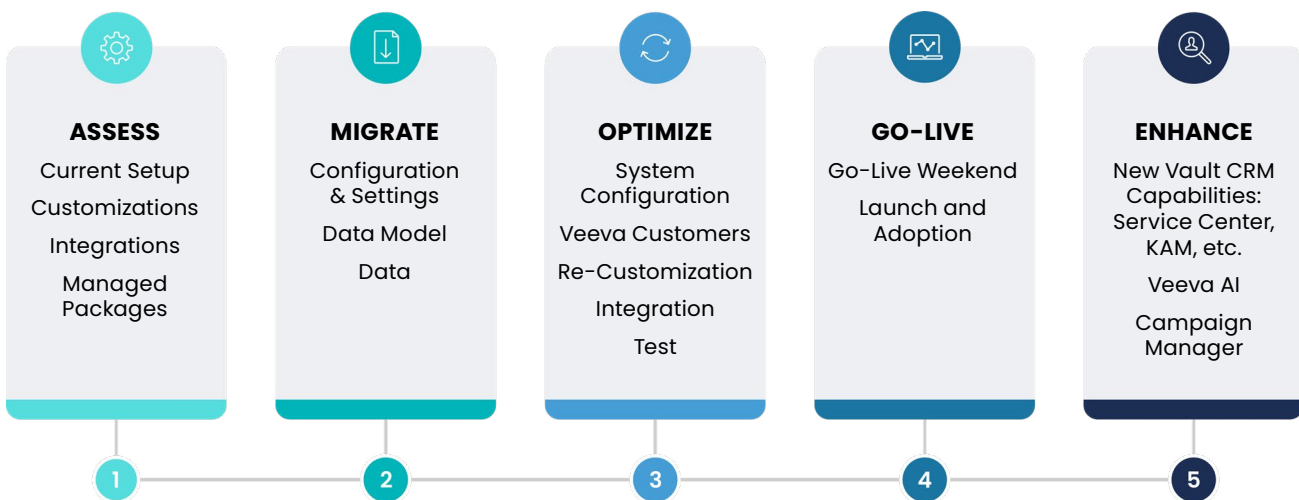
The following sections provide a deep dive into each phase, offering peer-tested best practices and strategic recommendations for every step of the journey.

## What do we mean by "Vault CRM migration"?

Currently, Veeva defines migration specifically as a technical move from Veeva CRM to Vault CRM, with a high degree of automation by our Services team. If you are using a non-Veeva solution, the project involves implementing Vault CRM based on your unique requirements. In these cases, Veeva works with you to understand and migrate necessary transactional data from your legacy system.

[Contact us for more information.](#)

## Vault CRM journey





## 1. ASSESS

### Set the foundation before migrating

A successful Vault CRM migration depends on proactive discovery and a clear understanding of requirements before implementation. By dedicating sufficient time to pre-migration work, SMB teams report significantly smoother transitions. SMB customers recommend prioritizing the following areas:

- Data cleansing:** Use the migration as an opportunity to 'delete the noise' and focus on high-quality HCP accounts that drive business value. Remove duplicates, archive irrelevant records, and standardize fields. "Before migrating we went through our customer data and deleted 30,000 HCP accounts and associated activities that were no longer important to our organization. Simplifying means your migration is a much more seamless process," explains Debbie Young, multichannel strategy and customer insights director at Otsuka Europe.
- Mapping and customizations:** Most fields will map 1:1 since the schema is largely the same, but verify all picklists, data types, and relationships. Then, identify and prioritize the business-critical customizations that require rebuilding. Young cautions that they had "underestimated the effort required to remap the objects for the integrations", and that "mapping and testing took much longer than expected."
- Integration discovery:** While Vault-to-Vault integrations such as Vault CRM - Veeva PromoMats - Veeva MedComms are simplified by unified architecture, [Veeva Nitro](#) and third-party tools require proactively mapping objects. Guillaume Vorburger, team leader of release and operations, commercial and medical systems at Idorsia Pharmaceuticals recommends connecting through APIs "very early once the sandbox is available to avoid timeline slippage."
- Resource planning and timing:** Take time to understand end-user needs and prepare the organization before the switch. Idorsia used internal newsletters and surveys to identify the most sensitive areas for documentation and support. Bejjani advises [prioritizing business continuity](#): "Choose the right timing to minimize disruption. Don't overpromise on functionality; instead, commit to a seamless transition."

#### Quick checklist: Is your foundation ready for migration?

- Data audit**  
Have you removed 'data noise' by deleting inactive HCP accounts?
- Customization review**  
Have you identified the 10–15 'must-have' customizations to rebuild?
- API readiness**  
Is your technical team prepared to test integrations as soon as the sandbox is available?
- Internal alignment**  
Are your regional CRM leads aware and involved?



## 2. MIGRATE

### Configuration and data

Executing the next phase of migration involves several critical technical steps to transition your settings and data model to the new environment. For most life sciences companies, [Veeva Network MDM](#) serves as the backbone for cross-system integration, simplifying master data management.

- Establish a single source of truth:** Utilize a predefined data model to manage [HCP reference data](#) alongside third-party data. This ensures data integrity across the organization.
- Update connectors:** Update or re-create existing Network MDM configurations previously used for Veeva CRM so they apply to Vault CRM. This typically involves disabling old connectors and creating new Vault connectors for essential entities like Accounts, Contacts, Visits, and Orders.
- Perform a trial synchronization:** Once the bridge and connectors are configured, perform a trial synchronization with a subset of data to verify the setup before the full migration.



*Clean up data and move custom configurations and processes out to Network or another MDM. This reduces the CRM complexity and streamlines your migration to Vault CRM.”*



**SCOTT EAVES**  
Director, Field Force Technology and Data Operations, Shionogi



### Automating success: What is the “Veeva Migration Tool”?

To ensure a rapid and reliable transition, Veeva provides specialized migration infrastructure designed to handle the heavy lift of data and configuration transfer.



#### The migration tool

A purpose-built automation engine maps your existing Veeva CRM data model to Vault CRM. It automates the transition of core entities, significantly reducing manual effort and minimizing the risk of data loss.



#### The migration team

A dedicated team of Veeva experts manage the tool’s execution. They oversee the migration process, allowing your internal team to stay focused on testing and business readiness.




### 3. OPTIMIZE


## Test and validate

After the technical migration and before the final launch, organizations enter a critical stage of testing and validation to ready the system for daily use. This phase is the primary responsibility of the customer and requires significant time to avoid go-live delays.

**I Validate through extensive testing:** Reliable performance depends on early and comprehensive verification of all system behaviors. Teams should leverage early sandboxes to test API connections and third-party integrations before the user interface is finalized, while ensuring that user acceptance testing (UAT) focuses on end-to-end, connected business scenarios rather than isolated tasks.

 **SMB PRO TIP:** Use the testing phase as a strategic opportunity to introduce users to the new experience and build internal buy-in. Otsuka generated significant confidence by involving dedicated CRM leads and actual field users directly in the testing process, ensuring the final product met real-world needs.

**I Optimize system configuration:** The automated migration tool does not handle security and sharing settings, which often require manual setup. Dedicate specific time post-migration to verify MSLs and field users have the correct visibility levels. In contrast, rather than manually rebuilding thousands of customized legacy reports, Veeva recommends establishing a high-value baseline. Vault's superior object-joining capabilities makes it easier to join different data sets to create better, modern visualizations.

 **SMB PRO TIP:** Pay especial attention to [events management](#). This area is uniquely challenging due to localized regulatory requirements and a wide network of stakeholders. Otsuka found that issues often arise when complex processes interconnect. Understanding exactly how these events should flow for end-users early on is essential for setting the right testing criteria.



**Watch now:** Otsuka Europe on Next-Gen Vault CRM





#### 4. GO-LIVE

### Launch and adoption

For most SMBs, the actual migration phase is tight, often spanning three to four months. A "Friday-to-Monday" transition is the gold standard, where users log off the legacy system and log back into Vault CRM with minimal disruption to their daily workflows.

- Strategic roll-out:** While many SMBs prefer a "big bang" approach where all data switches at once, some organizations consider a phased roll-out by region or business unit. Choosing the right deployment strategy is a balance between organizational risk and operational speed.
- Stabilize with hypercare:** Hypercare is a critical, short-term phase of intensive support and monitoring immediately after going live to ensure the system is stable and users adapt smoothly. Young highlights that "the Veeva hypercare team is super efficient and responsive. Usually, when a ticket is opened, they try and close it the same day that it's raised". Furthermore, Vorburger explains that "relying on internal resources and the Veeva team can be sufficient, without the need for external consultants increasing the budget", provided frequent status meetings between both teams to monitor progress.
- Build confidence with role-specific training:** Beyond technical stability, users need to feel empowered with the new tool. Start by supporting the admin evolution. Vorburger recommends "placing internal teams and Veeva experts in the same room for face-to-face workshops to facilitate direct knowledge transfer." Build a network of internal champions or super users across departments to lead the change. Long-term success comes from embedding the system into daily workflows through updated SOPs.
- Drive adoption:** A successful launch is ultimately measured by how effectively teams embrace the new platform. Because Vault CRM offers a consistent interface and a similar 'look and feel', the learning curve is remarkably shallow. Eaves notes: "The transition was very easy for our field teams. It looked the same for iPad users, and online users were up and running after a 15-minute training session." Teams already using other Vault applications like [Veeva PromoMats](#) will find the interface even more intuitive, accelerating proficiency.



#### Rethinking CRM in Life Sciences: From System Implementation to Value Creation

[Read Now](#)



## Avoid common migration pitfalls

Common hurdles can slow down migration momentum. Here's what to avoid:



### Rebuilding the past

Do not recreate thousands of legacy reports. The new Vault CRM platform enables more sophisticated visualizations.



### Siloed testing

Isolated scenario testing is insufficient. Instead focus on testing end-to-end, connected business processes, paying special attention to events management.



### Underestimating GxP

If your system is GxP validated, documentation burdens will be higher. Ensure your UAT scripts meet regulatory audit standards early to avoid extending timelines.



### Late-stage training

If your system administrators are participating in UAT, ensure they are trained before that phase begins. High-impact knowledge transfer happens when internal teams and Veeva experts collaborate in face-to-face workshops early in the process.



### The manual trap

Remember that security and sharing settings are largely manual and not handled by the automated migration tool. Allocate specific time post-migration to avoid user access issues at go-live.



### The missing lead

Do not underestimate the need for a dedicated internal point person. Even with Veeva's support, having one internal lead with bandwidth to manage the project ensures faster decision-making and keeps internal stakeholders aligned.



## 5. ENHANCE

### Unlock advanced capabilities

After the migration is complete, SMBs can quickly pivot from stabilization to unlocking innovation. Operating on a modern, unified platform allows SMBs to adopt advanced technologies that drive competitive advantage.

- Connected commercial teams:** Connecting sales, marketing, and medical teams on a single platform with a unified customer database enables key capabilities such as customer profiling, content sharing and management, territory and account planning, [key account management](#), sampling, call center, inside sales, and field engagement.
- Efficiency with Veeva AI:** SMBs are prioritizing high-impact AI use cases, such as the [Veeva AI Free Text Agent](#), to analyze unstructured data without increasing compliance risks. "We're excited to use the Veeva AI Free Text Agent as part of our strategy toward building AI capabilities into our business. Veeva AI enables us to gain deeper customer insights for more effective engagement in the rare disease space," says Kea Lingo, Chief Information Officer, Crinetics.
- Advanced marketing and sales innovation:** Modern technology stacks enable SMBs to implement sophisticated engagement strategies, such as using [Veeva Vault CRM Campaign Manager](#) to move campaign decisions closer to the field. "Campaign Manager can place the field force at the center of execution, strengthening and amplifying our marketing messages across all channels," explains Baptiste Omont, senior director, commercial and medical systems, Idorsia Pharmaceuticals Ltd.



*I'm excited to see how we can go from a call input system to a system that really enables reps to do their jobs more effectively. I'm particularly interested in the Free Text Agent. We plan to work closely with Veeva to address early compliance resistance and ensure we confidently capture rich insights to make the system more useful for our field teams."*



**DEBBIE YOUNG**  
Multichannel Strategy & Customer Insights Director, Otsuka Europe



**Watch now:** Idorsia: Orchestrating Sales and Marketing



# Deliver next-generation engagement

The migration to Vault CRM is more than a technical transition; it is a strategic transformation for higher productivity and innovation. You have the agility to not only move data but to completely reinvent and simplify your commercial operations for a new era of engagement.

For organizations starting today, insights from SMB peers and Veeva learnings can help you minimize disruption and fast-track innovation. By ensuring zero field downtime and empowering your teams for orchestrated, customer-centric engagement, you prioritize what matters most: building trusted relationships with HCPs and improving patient outcomes. Putting the right technology foundation in place is a critical step in accelerating your mission to deliver life-changing treatments.

## Achieve commercial excellence and next-generation engagement with Vault CRM.



Contact your Veeva Account Partner today to schedule a migration discovery session and map your unique path to innovation.



### ABOUT US

Veeva is the global leader in cloud software for the life sciences industry. Committed to innovation, product excellence, and customer success, Veeva serves more than 1,100 customers, ranging from the world's largest biopharma companies to emerging biotechs. As a Public Benefit Corporation, Veeva is committed to balancing the interests of all stakeholders, including customers, employees, shareholders, and the industries it serves.

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