

PART TWO

Engineering CRM Value: Linking Business Outcomes to Behavior Change



02



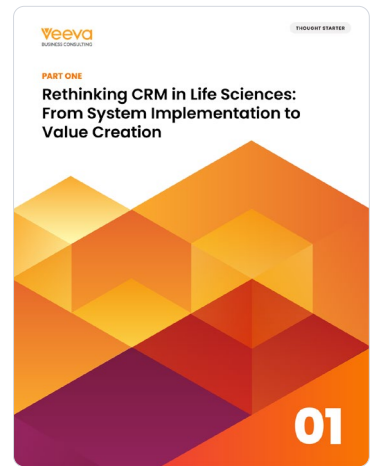
The gap between strategy and execution

Part 1 of this series established an uncomfortable truth: organizations don't realize CRM value at go-live, but through the specific behaviors that follow it. While most organizations agree that CRM should be business-led, few possess the rigorous discipline to bridge the gap between a high-level strategic vision and the daily reality of field execution.

If Part 1 was about the *why*, Part 2 is about the *how*.

To break the cycle of underutilized technology investments, organizations treat value as something to *engineer*, rather than merely expect. This requires a fundamental shift from tracking what a system *can do* to what a person *must do* to drive growth.

In this paper, we dive into the **Veeva Vault CRM Value Framework** — a systematic approach to mapping your most critical business outcomes to the specific behavioral levers that turn strategy into measurable business impact.



PART ONE 

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



Why CRM value remains elusive

Despite decades of investment, CRM remains one of the most underutilized enterprise platforms. Organizations continue to deploy increasingly sophisticated technology but struggle to translate those investments into sustained commercial impact.

The issue is not technology maturity. It is *how organizations conceive, own, and operationalize their CRM*. And this is becoming even more of a challenge with the arrival of agentic AI.

Too many programs remain delivery-led, measured by milestones, features, and training completion. Adoption is expected to follow naturally. Organizations often treat behavior change as a downstream activity rather than the core objective.

However, *people, processes, and behaviors* realize CRM value. Technology is the enabler — not the outcome.



Technology is the enabler, but aligning organizational leadership and commercial teams around a single vision is what delivers the real business benefit. The ultimate goal is that all functions act as one team."

Vangelis Vergetis,
CEO, Epikast



Moving beyond the ‘build it and they will use it’ myth

CRM failure rarely looks dramatic. Systems go live. Users log in. Data exists. Dashboards populate.

Yet underneath, the same symptoms persist:

- ✗ Inconsistent usage and shadow systems
- ✗ Poor data quality and fragmented insight
- ✗ Limited cross-functional coordination
- ✗ Minimal impact on decisions or customer outcomes

At the root is a flawed assumption: that adoption is a rational response to system availability.

In reality, people do not adopt tools. They adopt behaviors. And behaviors do not change simply because a system exists.



Vault CRM and Veeva AI Agents like Pre-call Agent and Voice Agent will drive efficiencies and allow the field to focus on the value parts of their jobs. It's good for the business, good for HCPs, and great for patients."

Frank Armenante,
Director, Field Systems and Projects, Novo Nordisk



Why agentic AI raises the stakes

The emergence of agentic AI — AI that doesn't just provide information but proactively executes tasks — makes a behavior-led framework more critical than ever. The '70/20/10' rule of digital transformation remains a stark reality: **70% of AI value is driven by people and process change**, 20% by data, and only 10% by the technology itself.

Without a rigorous value engineering framework, agentic AI risks becoming an expensive 'fancy search bar' rather than a commercial accelerator. To move the needle, organizations must solve for the human element.

In the **era of AI in life sciences**, your competitive advantage is no longer the intelligence of your tool, but the *speed and consistency* with which your people adapt their behaviors to leverage it.



From suggestion to action: AI can identify a 'next best action,' but value is only created if the representative has the confidence and habit to execute it in the field.



Trust and autonomy: Delegating tasks to an AI agent requires trust in the system's logic — a shift that requires intentional behavioral design and social proof.



Rewiring the workflow: Agentic AI can automate administrative friction such as call notes or follow-up emails, but unless that saved time is intentionally redirected toward high-value engagement behaviors, productivity gains will simply evaporate into 'busy work.'



A new definition of CRM success

To move beyond technical milestones, organizations redefine success by focusing on the human element of transformation. This shift requires moving from monitoring system activity to engineering the specific habits that drive commercial impact. The following framework outlines the transition from traditional, delivery-led metrics to a behavior-led, value-engineered model.

FIGURE 1:

Behavior-led, value-engineered CRM transformation

 FROM	 TO	 STRATEGIC ANCHOR
System logins	→ Consistent behaviors	Technology enablement does not equal value delivery
Lagging revenue	→ Leading indicators	Design value, don't assume it
Results-only coaching	→ Coaching how work is done	Outcomes follow behaviors
Secondary system	→ Primary workflows	CRM becomes the way work happens



Reframing CRM as a value-engineered transformation

High-performing organizations reframe CRM around three principles:

01. Business ownership is non-negotiable

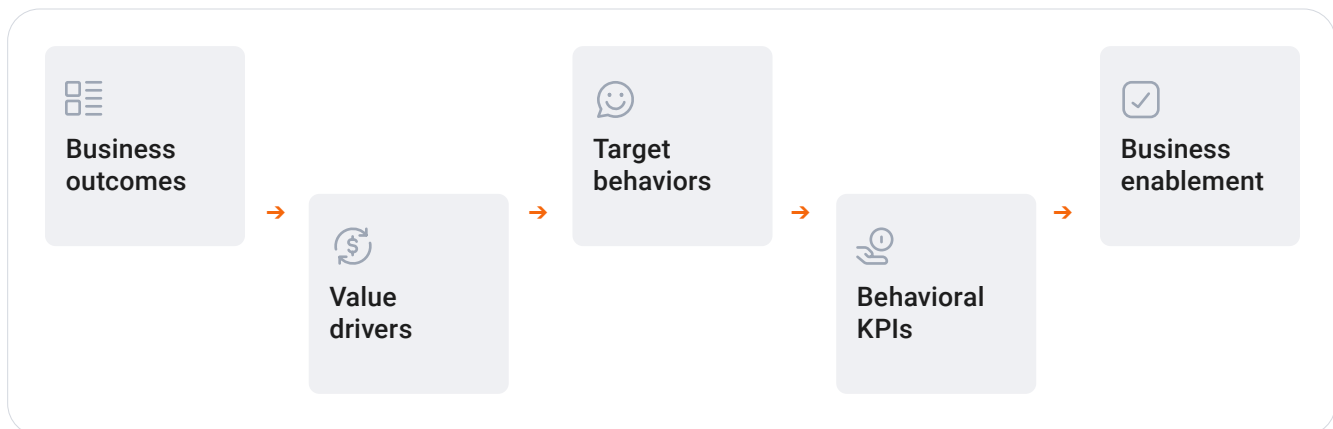
The business — not IT or digital alone — should own the CRM. Commercial, medical, and leadership teams define:

- ✓ What success looks like
- ✓ Which decisions should change
- ✓ Which behaviors must become standard

Technology teams enable this vision — they do not define it.

02. Value is engineered, not assumed

Link business outcomes to explicitly design value:



Without this chain, adoption becomes an activity without impact.

03. Behavior is the unit of change

The smallest meaningful unit of CRM value is a changed behavior:

- ✓ A different planning habit
- ✓ A coordinated follow-up
- ✓ A data-informed decision
- ✓ A timely cross-functional action

If behaviors do not change, outcomes will not either.



Partnering with Veeva shows us what's achievable when you have strong alignment between business, IT, and the vendor. And with that, we enable business excellence."

Raimond Jähn,
Vice President Information
Technology, BioNTech SE



From outcomes to adoption: The value engineering lens


FIGURE 2:
Veeva Value Engineering Approach

Key Steps	Approach	Examples
STEP 1 Define business outcomes	<i>The tangible impact we are trying to deliver</i>	<ul style="list-style-type: none"> ✓ Increased conversion and customer advocacy ✓ Improved relationship quality and experience ✓ Accelerated adoption along the customer journey ✓ Coordinated omnichannel engagement
STEP 2 Identify value drivers	<i>Key mechanism or capability used to deliver the outcome</i>	<ul style="list-style-type: none"> ✓ Better target prioritization ✓ Optimized engagement frequency ✓ Faster orchestration and follow-up ✓ Improved insight utilization
STEP 3 Translate into target behaviors	<i>Specific actions people must take to realize the value</i>	<ul style="list-style-type: none"> ✓ Planning all engagement in CRM ✓ Logging interactions consistently ✓ Triggering cross-functional actions ✓ Acting on signals in real time ✓ This is where value is created — and where many programs stop short.
STEP 4 Establish behavioral KPIs	<i>Metrics to track whether the target behaviors are happening</i>	<ul style="list-style-type: none"> ✓ Interactions with clear objectives (%) ✓ Calls planned in advance (%) ✓ Use of AI enabled free-text ✓ Time spent coaching vs. reporting ✓ Interactions aligned to engagement plans (%)
STEP 5 Business enablement	<i>Processes, technology, and organizational change designed to drive target ways of working</i>	<ul style="list-style-type: none"> ✓ Behavior-reinforcing workflows ✓ Job-specific AI agents ✓ Decision-guidance cockpit ✓ Administrative friction automation ✓ Scenario-based confidence coaching ✓ Market-winning narratives ✓ KPI-aligned coaching cycles ✓ Behavior-based incentives

A value-engineered CRM program works backwards from impact. Only once you've defined business outcomes, identified value drivers, translated into target behaviors, and established behavioral KPIs, does the work of business enablement begin. This is not merely a technical exercise; it is the holistic design of the environment required to make the new way of working inevitable. True enablement ensures that every organizational lever is pulling in the same direction to support the target behaviors:

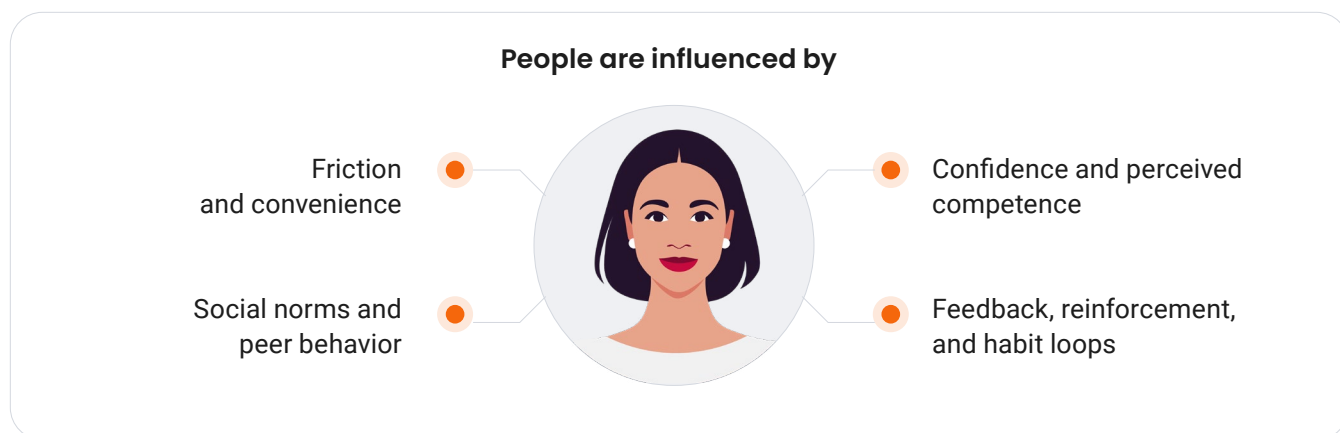
- ✓ Workflows that reinforce desired behaviors
- ✓ AI agents that support specific 'jobs to be done'
- ✓ **Cockpits or dashboards that guide decisions**, not just report data
- ✓ Automation that removes administrative friction
- ✓ Scenario-based coaching to build competence and confidence
- ✓ Transformation narratives focused on winning in the market
- ✓ Manager coaching cycles aligned to behavioral KPIs
- ✓ Incentives that reward the execution of target behaviors

In this model, technology is the final piece of the puzzle — the engine that powers a business environment already primed for change, ultimately *making the right behaviors the easiest behaviors*.



Why training alone is insufficient

Traditional change approaches assume people behave rationally once informed. Behavioral science shows otherwise.



To drive sustained CRM adoption, organizations *design for human behavior*, instead of fighting it.



From delivery to value creation

CRM programs do not fail because the technology is inadequate. They fail because organizations confuse implementation with transformation.

This shifts CRM from a system people are asked to use into a way of working the business depends on.

But defining and measuring behaviors is still not enough. To make them stick — day after day, team by team — organizations deliberately design the environment in which those behaviors occur.

That is where behavioral science becomes decisive and where we move our focus to in [Part 3: Making CRM Stick - A Behavioral Science Playbook for Lasting Adoption](#)

Unlocking sustained CRM value

- ✓ Anchor CRM in business outcomes
 - ✓ Engineer value through explicit behavior design
 - ✓ Measure what people do — not just what systems record
 - ✓ Reinforce new ways of working through leadership and governance
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