



How an Integrated Commercial Platform Fuels Sales and Expands Patient Testing

Executive Summary

Moving from siloed, manual sales activities to a unified, data-driven approach allowed a leading global cancer diagnostics organization to bridge internal visibility gaps and deliver key insights to stakeholders. They successfully drove this commercial ecosystem modernization by deploying an integrated platform centered on [Veeva Vault CRM](#), [Network MDM](#), [OpenData](#), and [Align](#).

By intentionally designing workflows that solve real-world field challenges rather than simply enforcing activity quotas, the diagnostics company achieved a qualitative shift toward “happy adoption”. This strategy ultimately supported record organizational performance, including increased sales volume and expanded patient testing.

1600+

users

3

business units

7 Teams

connects field sales, inside sales, account management, market access, customer service, medical, and commercial operations

Strategic Opportunities

Recognizing that disjointed legacy tools were slowing down the field force, the IT team used the Vault CRM platform to streamline daily activities and connect organizational data. The project aimed to solve three main commercial headaches:

Siloed Business Units: Rapid portfolio expansion via a mix of internal development and strategic acquisitions created lack of operational visibility across groups

Inefficient Field Planning: Extensive time and manual effort preparing for customer calls

Activity Tracking vs. Adoption: Teams saw CRM usage as a corporate tracking mechanism vs. a value-added activity to their process

Immediate Value Realized from CRM

To accelerate platform adoption across diverse business units, the diagnostics company focused on implementing specific CRM capabilities that provide immediate, tangible value to the field force's daily workflow rather than simply enforcing administrative tracking.

- **Tailored User Interfaces (X-Pages)**
 - Custom, low-code “dashboards” tailored to the objectives of each team
 - Removes need for external data visualization tools and provides reps with “need to know” information to inform daily decisions
- **Closed Loop Marketing**
 - Reps have instant access to up-to-date, approved content they can share through tracked channels
 - Vault CRM automatically captures which approved materials and key messages are shared during a visit, giving field teams immediate visibility into past conversations so they can seamlessly continue the customer relationship without any gaps in history
- **Dynamic Prioritization**
 - Integrates advanced sorting directly onto an interactive map view, allowing reps to filter accounts by proximity, priority rank, or recent activity gaps
 - Ability for reps to drag and drop high-potential prospects directly onto schedules, optimizing their driving routes and easily backfilling unexpected calendar openings
- **Suggestions for Next Best Action**
 - Field teams get automatic alerts when an account is active or needs attention, paired with a suggested follow-up action
 - Reps can instantly launch an approved, tailored email or schedule a call directly from the alert or dismiss the suggestion based on account knowledge



Business Value

Transitioning the CRM platform from an administrative tracking tool into an operational asset triggered a wave of positive field adoption. The user-first approach successfully converted software usage into a competitive advantage, leading to a highly collaborative and engaged commercial culture.

- **Stronger Engagement and Adoption** - Vault CRM is now a valuable decision-making asset rather than just a mandatory tracking chore. Because of this, the field team is highly engaged and actively requesting new features to make their daily work even easier.
- **Enhanced Commercial Visibility** - The organization eliminated critical blind spots across historically siloed divisions, allowing all internal teams to see exactly how their collective actions impact a health system in real time. Additionally, leadership can now evaluate performance across all business units using the exact same standards.
- **AI Enabled Field Productivity** - The unified cloud foundation sets the stage to immediately deploy native AI in Vault CRM, to assist in capturing high-quality customer insights in real time.
- **Accelerated Time-to-Value** - By creating a master CRM “template”, the IT team can spin up a matching environment for new business units in just three weeks, eliminating a historic bottleneck.

Replacing disjointed software with a single, connected platform proved that when you give field teams tools they actually want to use, business growth follows. While this new approach has already driven record sales and expanded patient access to testing, the future addition of embedded AI will make daily routines even smarter, ultimately giving the diagnostics company a foundation built to scale right alongside its clinical innovation.

Why Vault CRM Suite?



Unified Commercial Foundation

Connecting data across teams creates a seamless end-to-end workflow that eliminates internal silos and manual handoffs, allowing different functions to operate with one clear, consistent message



Faster Time to Value

Vault CRM is built for life sciences, providing out-of-the box workflows to accelerate deployment and value to reps



Lower Total Cost of Ownership

Avoids configuration bottlenecks and minimizes IT overhead by utilizing applications and data updates that interlock seamlessly out of the box



Data → Insight → Action

Real-time visibility enables faster, more informed decision-making for pre-call planning and account strategy

Discover how a unified, AI-driven platform removes software burdens so teams can focus on sales and patient outcomes.

