Navigating CRM transformations

a perspective from the ground

Since the 2023 announcement of Veeva and Salesforce's Customer Relationship Management (CRM) partnership split[1,] Deloitte has been on the frontlines of CRM transformation in the pharmaceutical industry—supporting clients through strategy, planning, and early implementation. Our work with top five biopharmaceutical companies has surfaced patterns and lessons about leading practices and common stumbling blocks that others within the industry can learn from.

Is your Chief Financial Officer questioning the costs? Is your sales leader envisioning a future where representatives do not have to log every post-call note? Are your operations teams worried about the disruption to business-as-usual? If so, you are not alone. We've seen these concerns rise within organizations and have identified key personas who represent these common doubts and ambitions within CRM transitions. We will help provide additional color and context to different "personas" within biopharmaceutical organizations that we've collaborated with and the tools you can use to more seamlessly connect with them.

1. Veeva Q3 2023 Earnings Report

What makes a CRM transformation different from any other organizational transformation?

Many organizations have navigated transformation before—but CRM transformations are different. They impact front-line teams directly, touch multiple business functions, and require upfront planning unlike anything most organizations have experienced. In the pharmaceutical industry, these transformations may affect hundreds of thousands of people in the workforce, spanning sales, marketing, medical affairs, and information technology. And for large organizations, the price tag can exceed $50 million. What's more, CRM transformations carry unique risks and pressures.

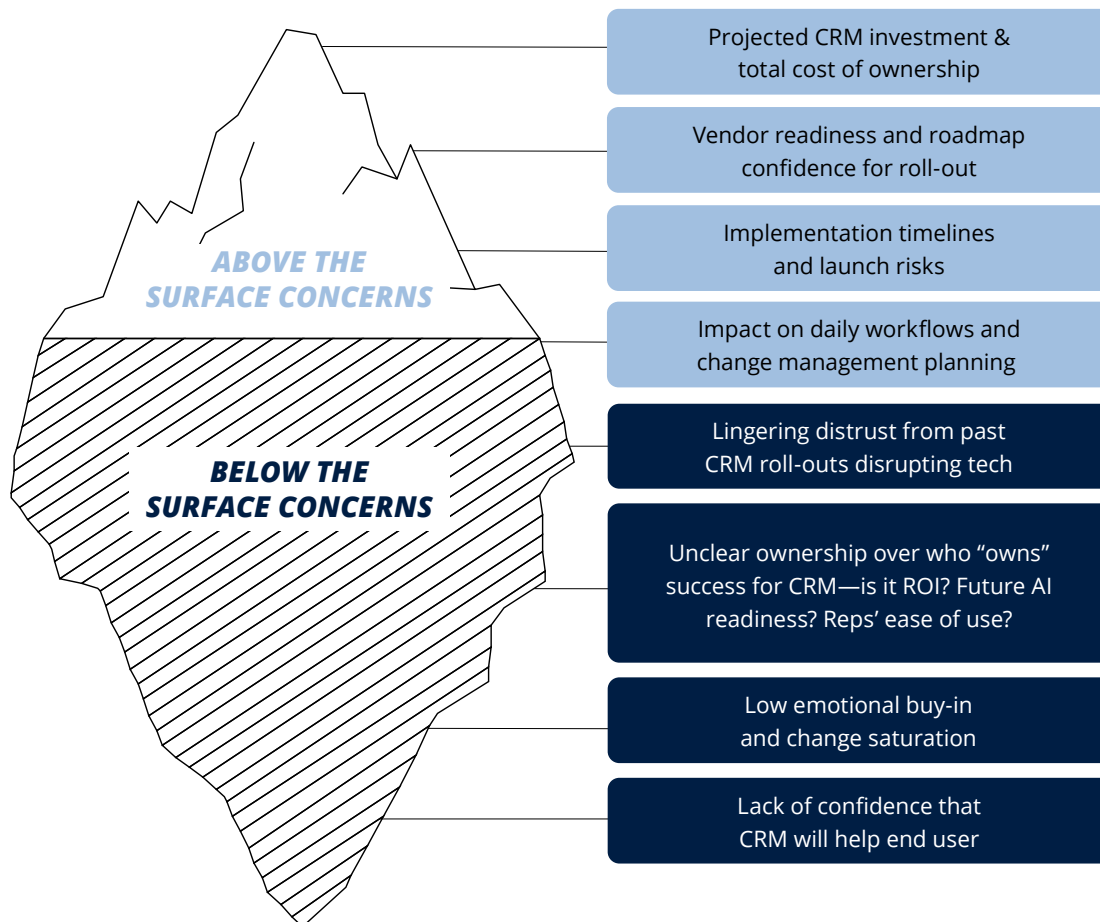| TYPICAL ORGANIZATIONAL TRANSFORMATION	THIS CRM TRANSITION
Triggered internally (e.g., cost pressure, restructuring)	Triggered externally (Veeva-Salesforce split)
Flexible timing — driven by organizational business needs	Fixed timing—existing tech sunsets in 2030
Often optional and on organization's terms	Non-negotiable—all legacy users must act
Limited stakeholder disruption	Broad cross-functional impact
Pre-budgeted and planned	Potentially unplanned, mid-cycle investment
Success = local optimization	Success = enterprise-wide adoption and ROI

Because CRM transformations don't just touch one department or function, they require enterprise-wide adoption. And that means the path to success isn't just technical; it's deeply human. Achieving alignment at scale demands a more hands-on, intentional approach to change management.

What might be hiding beneath the surface of your organization's CRM transformation?

Beneath the dashboards and data flows lies a complex web of behavioral and emotional dynamics that, if left unaddressed, can quietly undermine even the most well-funded efforts. These include resistance to behavior change, low trust between teams, concerns over data quality, frustration with user experience, and a lack

the change. Addressing them requires going beyond communication plans to build a deeper, ongoing dialogue with those most impacted.

We have seen organizations get caught off-guard by these above and below-the-surface issues—at times too late to

ABOVE THE SURFACE CONCERNS

BELOW THE SURFACE CONCERNS

Projected CRM investment & total cost of ownership

Vendor readiness and roadmap confidence for roll-out

Implementation timelines and launch risks

Impact on daily workflows and change management planning

Lingering distrust from past CRM roll-outs disrupting tech

Unclear ownership over who "owns" success for CRM—is it ROI? Future AI readiness? Reps' ease of use?

Low emotional buy-in and change saturation

Lack of confidence that CRM will help end user

of emotional buy-in. These aren't always obvious in planning meetings—but they are critical to navigate if the broader organization is going to adopt and sustain

efficiently course correct. We seek, with our experience, to help your organization identify and understand how to deal with and mitigate the friction points you will hit.

What are the personas that you may encounter within your organization?

The CRM transition is not just a technical migration, but a strategic inflection point. These five key stakeholder personas consistently can cause delays and derails if not properly managed, and understanding where each is coming from, what they fear, and what they prioritize is essential to navigating this moment effectively.

FINANCE-FOCUSED GUARDIAN

A Finance-Focused Guardian will typically be plugged in to the transformation once strategy turns tactical, and almost always with one burning question: "How much is this really going to cost us?" And they do not just mean the software license. They're thinking holistically— productivity loss, change management, the time it

ARCHETYPES	FINANCE-FOCUSED GUARDIAN	OPERATIONS INTEGRATOR	JUNIOR OPERATOR	FUTURE ARCHITECT	EXPERIENCE LEADER
Cares about...	Cost management and enterprise risk management	Minimizing disruption and risk and system integration and resilience	Day-to-day usability and current system pain points	Future proofing and flexibility, data and analytics maximization	Field effectiveness and customer experience
Wants to know...	Cost of transition and levers to manage and minimize financial risk, length of transition, and resource impacts	Level of disruption on day-to-day operations and strategies to minimize impact and integration points with existing systems, platforms, and technology (e.g., AI)	How proposed changes will address known frustrations (e.g., broken dropdowns, clunky workflows) and if new systems will be intuitive or disruptive	Capabilities and requirements needed to support long-term business and strategic goals and value generation of the transition	Ways to support field and sales team and improve HCP experience with reps, and how to transition CRM from reporting tool to powerful data engine
Loudest when...	Shift is more *transformational*, and solutions become more customized and bespoke rather than out-of-the-box	Shift is more *transformational* and may have more impact and variance from current state (BAU)	Changes *threaten workarounds or disrupt familiar processes* without guidance or training	Shift is more *foundational*, and current capabilities cannot support future strategic needs (i.e., personalized medicine)	Shift is more *foundational*, and capabilities cannot support future vision (i.e., personalized HCP experience)

Insights provided by Deloitte Senior Leadership

For each of these personas, you may find similarities to stakeholders from your own organization. Understanding their perspective, potential above and below-the-surface concerns and future aspirations for CRM will allow you to better navigate conversations and garner alignment.

takes to train teams, and even the opportunity costs of diverting resources from other initiatives. They have long-range budgets to defend and little patience for surprises. If you do not bring them in early, you can anticipate late-stage objections that can derail timelines, shrink scope, or delay the rollout altogether.

OPERATIONS INTEGRATOR

An Operations Integrator will typically be involved in the early planning of your transformation and have historic knowledge of the current state tools and processes. Given that experience, they will often take the perspective of, "This cannot break our field reporting or sample tracking." They are the ones ensuring compliance and continuity behind the scenes while juggling multiple transformation programs—global CRM rollouts, AI pilots, new compliance standards. They need ironclad assurances that the new CRM will not disrupt day-to-day operations. Their bias is toward stability, so if your pitch doesn't address how business-critical functions will be protected in the short term, they will likely deprioritize long-term benefits in a heartbeat.

JUNIOR OPERATOR

A Junior Operator knows the current system better than almost anyone—and that's both their superpower and their limitation. They are neck-deep in the day-to-day frustrations: broken dropdowns, clunky workflows, and workarounds that only make sense to those who have lived through the last five CRM updates. Because they are so entangled in the problems of today, it is hard for them to imagine a different future—let alone help design one. They might raise a hundred tactical flags but miss the strategic upside entirely. Without guidance, they potentially risk anchoring the conversation in the status quo and slowing the team's ability to move forward.

FUTURE ARCHITECT

A Future Architect is at the opposite end of the spectrum from the Junior Operator and are likely asking questions others have not even thought of yet: "Are we building something that supports our future ambitions—or boxing ourselves in?" Their lens is long-term and strategic. They care deeply about extensibility, integration, and how this CRM decision impacts future initiatives like Generative AI, advanced analytics, or patient-centric engagement models. Their future-facing lens can lead them to overlook technical and ecosystem feasibility,

so their vision may need to be tempered with technical reality. If they're not part of the discussion early and often alongside the technologists, there's a real risk that decisions made today will likely create technical debt tomorrow—leaving the organization stuck with a rigid system when it needs to be nimble.

EXPERIENCE LEADER

An Experience Leader believes it all comes down to one thing: "Will this make life better for reps and providers?" They are laser-focused on improving the quality of engagement, not just streamlining backend workflows. More clicks? That is a problem. Clunkier user experience? That is a non-starter. They want to see how the new system empowers reps with better data, sharper personalization, and smoother conversations. If the CRM transformation does not directly enhance field experience and customer outcomes, no amount of backend optimization will make it a win in their eyes. If they are not a part of the transformation early on, there is a risk of not capturing the right functional capability requirements which speak to healthcare provider and user experience expectations.

Bringing these voices into structured and early conversations is essential, not just to align, but to design a CRM transition that is resilient, future-ready, fit for purpose according to your organization's requirements, and ultimately adopted.

What are the risks and benefits of proactive stakeholder management?

This CRM transformation is inherently risky and can lead to poor-fit partnerships, slow and confusing transitions, missed business alignment, weak adoption, and diluted return on investment, but there are ways to circumvent the common stumbling blocks. Without deliberate orchestration, what should be a catalyst for future readiness can become a source of fragmentation.

To get it right, leaders need to own the narrative from the start, clarifying what is changing, why it matters, and how it aligns with business goals. Vendor selection should reflect more than features, but foresight as well. Rollout is not just the finish line, but the moment to re-engage, retrain, and reaffirm commitment.

At every phase, alignment is the hinge point. Done well, it builds confidence, accelerates change, and unlocks value. Done poorly, it leaves the door open for underperforming technology and underwhelmed teams.

These lessons—drawn from our work with cross-functional teams on CRM transitions—reflect what it really takes to lead with clarity, credibility, and strategic intent.

These lessons also remind us that CRM transitions are not just about systems, but people, power, and purpose. If you get alignment right, you are setting the foundation for a smarter, more sustainable, and connected future.

LESSONS LEARNED

01 Silence is not buy-in. Check for true engagement, and not just agreement

02 Define CRM before you design CRM (e.g., are you upgrading your SFA or reimagining omnichannel engagement?)

03 Past CRM transformation scars may run deep. Hidden mistrust from past technology roll-outs can stall progress unless directly addressed

04 Personas can pull in different directions. Finance wants ROI, Ops wants stability, and architects want future-proofing— alignment early is needed

05 CRM transformations shift ownership— sometimes quietly. It is critical to surface early where decision rights, influence, and accountability change

Continue the conversation

Interested in learning more about Deloitte's vision for the future of customer engagement? Or want to discuss which engagement model is best suited to unlock value for your organization?

REACH OUT TO US.

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