

Changing Your CRM in Pharma

What usually goes wrong and
how to avoid it.

A Comprehensive Guide to Pharma CRM
migration with Media-Soft

“CRM migration is one of the most underestimated transformation projects in Pharma.”

CRM Decision & Success Framework

Choosing a CRM in pharma is rarely a question of technology.

It is a decision that shapes how field teams operate, how data is trusted, and how commercial strategy is executed in practice.

However, many CRM transformations fall short not because of the platform itself, but because the fundamentals are misunderstood from the start.

In reality, the most common reasons for failure are well known, but often underestimated in practice. Field adoption does not fail because teams resist change, it fails because daily usage is too complex. Logging visits takes too long, workflows are not aligned with real-life interactions, and the system becomes a burden instead of a support tool. At the same time, data quality gradually deteriorates. When data entry is inconsistent or perceived as low value, trust in the system erodes, and decision-making shifts away from CRM altogether.

Another critical challenge is the lack of visible business impact. When field teams and management do not clearly see how the CRM improves performance, engagement drops and the system becomes secondary.

Change management is also frequently underestimated. CRM transformation is not just a system rollout, it requires behavioral change across the organization, which is rarely fully supported.

“CRM migration is one of the most underestimated transformation projects in Pharma.”

Finally, ownership is often unclear or misaligned. Before and after go-live, CRM responsibility can sit with the wrong stakeholders, leading to gaps in governance, slow decision-making, and long-term inefficiencies.

What differentiates successful CRM transformations is a fundamentally different approach.

Instead of focusing on features, leading organizations prioritize adoption. They design systems around the real needs of field teams, ensuring that workflows are simple, intuitive, and aligned with daily activities. Data is treated as a critical asset, structured and maintained in a way that enables confident decision-making. At the same time, governance is clearly defined, creating accountability and long-term sustainability.

These are not theoretical risks, they are daily realities across pharma organizations.

“CRM migration is one of the most underestimated transformation projects in Pharma.”

For decision-makers, this means shifting the focus from what a system can do, to how it will actually be used.

Key questions naturally follow:

- Will this system become part of the daily routine of field teams, or will it be bypassed?
- How will productivity be affected during and after the transition?
- Can the organization rely on the data it generates?
- And how easily can the system adapt to evolving business needs?

These considerations ultimately define whether a CRM becomes a true commercial enabler or just another underutilized tool.

This is precisely where Media-Soft positions itself differently.

Sales Vision CRM is built specifically for the realities of pharma organizations, with a strong emphasis on usability, adoption, and data quality from day one. Rather than introducing unnecessary complexity, the platform is designed to remain flexible and scalable, supporting both commercial execution in the field and operational control at HQ level. The result is a system that is not only implemented successfully, but consistently used, trusted, and capable of delivering measurable business impact.

A Structured approach to CRM migration and commercial alignment

CRM transformation in pharma is no longer a technical upgrade, it is a strategic business decision. In an increasingly complex ecosystem shaped by omnichannel engagement, regulatory pressure, and rising expectations from HCPs, pharmaceutical organizations must rethink how commercial teams operate, collaborate, and deliver value.

Yet, many CRM initiatives fall short, not because of the technology itself, but due to misalignment, poor adoption, unclear ownership, and underestimated complexity. **This playbook summarizes practical insights shared during our live discussion with industry leaders. It outlines common pitfalls, key success factors, and a structured approach to CRM migration that ensures continuity, compliance, and measurable commercial impact.**

Whether you are evaluating a new CRM platform or optimizing an existing one, this guide is designed to help you navigate transformation with clarity and confidence.

Choosing the right CRM migration partner in a changing Pharma ecosystem

Migrating to a new CRM is not just a technical change but a strategic shift that affects how pharma companies operate, engage with HCPs, and ensure compliance. With industry changes such as the evolving Veeva-Salesforce relationship, the need to rethink CRM strategies has become increasingly urgent. Media-Soft, together with Sales Vision CRM, delivers a proven, structured, and pharma-first migration approach that ensures continuity, compliance, and long-term value from day one.

Why Choose Media-Soft for your CRM Migration?

Media Soft brings decades of expertise in the pharma sector to every CRM migration project, delivering a solution built specifically for the realities of pharma business. With nearly 30 years of experience, Media Soft understands regulatory complexity, compliance requirements, and modern HCP engagement. The CRM is tailored to each company's processes, with customizable workflows, dashboards, and integrations that scale from regional teams to global organizations. Through strong omnichannel capabilities, Media Soft unifies all HCP touchpoints, enabling consistent communication, better visibility, and long term value.

Key advantages include:

- Quick deployment with minimal disruption
- One connected system for sales, marketing, medical, compliance, and patient engagement
- Agile, future-proof architecture built for regulatory change
- AI-driven analytics, routing, and insights designed specifically for pharma use cases
- Custom workflows without coding
- Transparent pricing with no lock-ins
- Trusted by 25,000+ field users daily

How Media-Soft ensures a seamless migration

To address common migration concerns such as data loss, downtime, and user adoption, Media-Soft follows a structured and proven methodology:

- **Comprehensive Assessment**

Our experts work closely with you to evaluate your current system, identify pain points, and outline goals for the new CRM.

- **Secure Data Transfer**

Using advanced data mapping techniques, we ensure that all your existing data is transferred accurately, securely, and without loss.

- **Tailored Configuration**

We configure the CRM to match your processes, from workflows and reporting structures to omnichannel integrations.

- **Rigorous Testing**

Before going live, we conduct extensive testing to validate system performance, identify potential issues, and resolve them proactively.

- **Training & Ongoing Support**

Our team provides customized training sessions to ensure your staff feels confident using the new system. Post-migration, we offer continuous support to address any challenges and optimize the system over time.

Sales Vision CRM end-to-end implementation framework



In the following sections, we outline the data migration process in detail, explaining how data is prepared, mapped, migrated, and validated within Sales Vision CRM. This includes a clear description of all steps involved, the roles and responsibilities of Media-Soft team and the customer's stakeholders, and the governance applied throughout the process. The goal is to ensure data accuracy, consistency, security, and full alignment with business and compliance requirements.

1. Project initiation & kickoff

Once Sales Vision CRM is selected, a formal implementation project is initiated to ensure alignment, clarity, and controlled execution.

1.1 Governance & project roles

Sales Vision / Media-Soft Team

- **Key Account Manager (KAM)**

Primary point of contact responsible for coordination, progress tracking, and issue escalation.

- **Implementation Consultant**

Leads functional configuration and aligns best practices with customer processes.

- **Technical Support Team**

Manages system setup, integrations, and technical configurations.

- **Management Sponsor**

Oversees milestones and ensures delivery aligns with contractual scope.

- **Hypercare Support Team**

Provides high-priority monitoring and SLA-based support during go-live and the first quarter of live usage.

Customer Team

- **CRM Administrator (Project Owner)**

Owens system configuration, internal coordination, and user management.

- **Sales Manager**

Defines sales workflows, call reporting logic, and field force processes.

- **SFE Manager**

Provides targeting, segmentation, KPIs, and reporting requirements.

- **Marketing Manager**

Defines product hierarchies, campaigns, and promotional cycles.

- **Regional Managers**

Validate territory structures and operational alignment.

2. Kickoff meeting scope

Once Sales Vision CRM is selected, a formal implementation project is initiated to ensure alignment, clarity, and controlled execution.

2.1 Functional overview

- Sales Vision CRM architecture and core modules
- User roles and permission model
- Web and mobile application overview
- Offline and online synchronization logic (if applicable)

2.2 Data migration & integration planning

- **Identification of data sources:**
 1. Existing CRM systems (API or database exports)
 2. ERP or master data systems
 3. Excel or CSV datasets
- **Definition of data objects:**
 1. HCP/HCO master data
 2. Products and product hierarchies
 3. Territories and sales structures
 4. Users and role assignments
 5. Historical activities (calls, visits, samples, promotions – if in scope)
 6. Data mapping, normalization, and validation rules
 7. Third-party integration setup (if applicable)

2.3 Implementation planning

- Definition of implementation phases
- Project timeline and milestones
- Responsibility matrix (RACI)
- Communication and escalation paths
- Risk identification and mitigation planning

3. System configuration & database import

3.1 System configuration

- Setup of production and training environments

Configuration of:

- User roles and access levels
- Sales territories and alignments
- Product catalogs and promotional materials
- Call flows and visit reporting logic
- Approval workflows (if applicable)
- KPIs and dashboards

3.2 Data migration execution

- Execution of the agreed data import strategy
- ETL process (Extract, Transform, Load)
- Initial data load into Sales Vision CRM
- Logging, reconciliation, and validation of migrated records

4. Data review & validation phase

- Customer-side validation of imported data
- Cross-checking:
 - Account assignments
 - Territory coverage
 - Product associations
 - User access and visibility
- Identification and resolution of inconsistencies
- Data corrections and re-imports if required
- Formal customer sign-off on data accuracy

5. CRM Administrator technical training (2 Days)

A dedicated deep-dive training for the appointed CRM Administrator.

Day 1 – Core administration

- System navigation and architecture
- User creation, roles, and permissions
- Territory and alignment management
- Product and campaign setup
- Call reporting and workflow configuration

Day 2 – Advanced administration

- Reporting and dashboard configuration
- KPI management and analytics
- Data import/export procedures
- Troubleshooting and system monitoring
- Best practices, optimization tips, and common pitfalls
- Change management and scalability considerations

6. End-user training (remote)

- **Role-based remote training sessions (Sales Reps, Regional Managers, HQ users)**
- Training topics include:
 - Daily usage scenarios
 - Call planning and execution
 - Activity reporting
 - Mobile application usage
 - Compliance and data quality guidelines
- **Delivery of training materials:**
 1. User guides
 2. Recordings
 3. FAQs

7. Go-Live & hypercare phase

- Controlled go-live
- Dedicated hypercare support:
 - Priority incident handling
 - Rapid response to user issues
 - Continuous monitoring of system usage and data quality
- Weekly status reviews during the first quarter
- Performance optimization and fine-tuning

8. Transition to business-as-usual (BAU)

- Formal handover to standard support
- Delivery of final documentation
- Project closure and review
- Roadmap discussion for future enhancements and integrations

CRM transformation in pharma succeeds when strategy, governance, technology, and people move in alignment. The organizations that approach migration as a structured, cross-functional initiative, rather than a system replacement are the ones that unlock real value.

A successful CRM migration ensures:

- Clear ownership and governance
- Strong adoption and change management
- Data accuracy and compliance from day one
- Omnichannel alignment across commercial, medical, and marketing
- Long-term scalability and measurable business impact

Acting with structure, clarity, and the right partner enables continuity, and positions your organization for future growth.

“CRM migration is one of the most underestimated transformation projects in Pharma.”

[Client testimonials and the latest case studies can be explored HERE.](#)

These real-world examples showcase how pharmaceutical companies have successfully approached CRM transformation with Media-Soft – not only implementing a new system, but improving field adoption, strengthening data quality, and enabling more effective commercial execution.

Each story reflects a different starting point, challenge, and objective, but they all share one common outcome: a CRM that is actively used, trusted by teams, and capable of supporting long-term business growth.

As the pharma landscape continues to evolve, the ability to adapt quickly, maintain control over data, and ensure alignment between strategy and execution becomes increasingly critical. Choosing the right CRM partner is therefore not just a project decision, but a strategic investment in future performance.

If you are currently evaluating your CRM approach or considering a change, we would be happy to support you in defining the right path forward.

[Click here](#), and book a call to explore how Media-Soft can support your CRM transformation.



[CASE STUDIES](#)



[BOOK A CALL](#)