Veeva CRM to Vault Migration: A 50-Task Technical Checklist

By Adrien Laurent, CEO at IntuitionLabs • 12/31/2025 • 35 min read

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Executive Summary

The planned migration from Salesforce-based Veeva CRM to Veeva's new Vault CRM represents a major upheaval for the biopharmaceutical industry. Veeva announced in early 2023 that Vault CRM – built on its proprietary Vault platform – will supplant the legacy Salesforce-based CRM ([1] www.veeva.com) ([2] www.veeva.com). By April 2024, Vault CRM became the default for all new Veeva customers ([1] www.veeva.com). For existing customers, **first migrations begin in 2025** and the bulk of transitions will occur from 2026–2029 ([1] www.veeva.com) ([3] candf.com). Accordingly, enterprises must prepare now. This report outlines 50 critical tasks before switching to Vault CRM, drawn from industry analyses, vendor documentation, and best practices.

Key findings include:

- **Timeline & Scope**: Vault CRM was launched April 2024; existing users migrate 2025–2030 ([1] www.veeva.com) ([3] candf.com). By 2030 Veeva CRM on Salesforce will be retired, as noted by Veeva's public statements ([1] www.veeva.com) ([3] candf.com).

- **Rationale for Migration**: Veeva's move reflects Salesforce's limitations for regulated pharma workflows ([4] bridgeviewls.com) ([5] www.salesforce.com). Vault CRM offers industry-tailored features: unified Vault data model, built-in multi-channel engagement (e.g. service center) and AI agents ([4] bridgeviewls.com) ([6] intuitionlabs.ai). BridgeView analysts observe that Vault CRM "continues to retain the data model" of classic CRM while adding flexibility ([4] bridgeviewls.com). In sum, Vault CRM promises deeper integration with clinical content (Vault Quality, etc.) and future innovations (AI, omnichannel) ([4] bridgeviewls.com) ([7] www.veeva.com).

- **Migration Process**: The technical migration is largely orchestrated by Veeva's platform. Key preparatory tasks include running Veeva's **pre-migration report** to inventory existing CRM configurations and connectors ([8] docs-vdm.veevanetwork.com) ([9] docs-vdm.veevanetwork.com). Administrators must then create a new Vault CRM system and "bridge" in Veeva Network, clone or recreate target subscriptions, and enable Vault CRM connectors ([8] docs-vdm.veevanetwork.com) ([10] docs-vdm.veevanetwork.com). Custom Apex code and third-party integrations **are not migrated automatically**; these must be re-developed or re-engineered by the customer ([11] candf.com) ([12] bridgeviewls.com). Data migration typically involves extracting CRM data (often via export or ETL), staging in Vault sandboxes, and load verification (steps like *extract-transform-load*, with multiple dry runs) ([13] developer.veevavault.com) ([14] developer.veevavault.com).

- **Challenges & Best Practices**: Data quality is a critical concern – industry reports estimate roughly **30% of live CRM records are stale or duplicate** ([15] moldstud.com) ([12] bridgeviewls.com). Experts urge a thorough data audit and cleansing before any migration ([15] moldstud.com) ([12] bridgeviewls.com). Another risk is business continuity: Vault CRM uses different terminology and UIs (e.g. *Field Permissions* vs Salesforce *Field-Level Security*) so robust change management and training are imperative ([16] vaultcrmhelp.veeva.com) ([17] www.veeva.com). Notably, GSK's case study shows success with a **persona-based change plan** – keeping field reps on familiar workflows but intensively training admins and tech teams ([17] www.veeva.com). Best practices also stress close collaboration with partners and Veeva: Veeva has already engaged Accenture to advise on migration approach and timing ([2] www.veeva.com).

- **Implications & Future Directions**: Vault CRM's debut reshapes the life sciences CRM market. Early movers (e.g. GSK, Boehringer, other top-20 biopharma) see a strategic advantage in Vault's built-in AI and unified platform ([7] www.veeva.com) ([18] www.veeva.com).However, some companies may reconsider CRM vendors: Salesforce itself launched a new "Life Sciences Cloud" (2023) ([5] www.salesforce.com), and IQVIA is expanding its offerings, intensifying competition. Our analysis suggests that by 2030 most Veeva CRM clients will either be on Vault CRM or have evaluated alternatives. For now, the primary focus is a structured, well-governed migration, underpinned by the checklist below.

This report provides comprehensive background, a 50-task migration checklist (Table 1), technical guidance, data best practices (Table 2), case examples (e.g. GSK, BridgeView) and future implications. All assertions are supported by vendor documentation, industry analysis, and research ([1] www.veeva.com) ([15] moldstud.com) ([7] www.veeva.com).

Introduction

Customer Relationship Management (CRM) systems are mission-critical for life sciences organizations, coordinating field rep interactions with physicians (HCPs), managing call reports, and integrating with marketing and regulatory data ([19] intuitionlabs.ai) ([15] moldstud.com). For over a decade, Veeva Systems' Salesforce-based CRM dominated this sector (reportedly ~80% of life sciences CRM deployments ([20] intuitionlabs.ai)). However, industry constraints – such as the need for validated systems, local language regulations, and a unified data model across commercial and regulatory functions – have increasingly strained generic CRM platforms. Accordingly, Veeva invested heavily in its own *Vault* cloud architecture (originally for content and quality management) and unveiled **Vault CRM** in May 2023 as the next-gen CRM for life sciences ([21] www.slideshare.net) ([4] bridgeviewls.com).

Vault CRM runs on the Vault Platform, which is purpose-built for pharma/biotech workflows ([4] bridgeviewls.com) ([7] www.veeva.com). It allows tight integration with other Vault applications (e.g. PromoMats, RIM, Quality) and provides features tailored to regulated customer engagement: a comprehensive omnichannel service center, new AI agents (for intelligent next-best-action), offline "zvod" architecture, and built-in compliance monitoring. As BridgeView observes, end users will see "minimum change from a front-end perspective" and retain all existing functionality, but can benefit from new innovations beyond Salesforce's limits ([4] bridgeviewls.com) ([12] bridgeviewls.com). For example, Vault CRM introduces **Section Attributes** and **Vault Messages** in place of Salesforce signals, and it embeds Vault content directly into the CRM call logs ([16] vaultcrmhelp.veeva.com) ([18] www.veeva.com). Academically, this shift fits a larger trend of "life science-specific cloud" solutions: Veeva claims Vault CRM will accelerate launches and improve data integrity ([18] www.veeva.com) ([4] bridgeviewls.com).

Veeva has now signaled a firm schedule for retirement of the old CRM. On April 1, 2024, Veeva announced Vault CRM is the default for all new customers, effective immediately ([1] www.veeva.com). The first migrations of existing Salesforce-based CRM customers will begin in early 2025, with most companies expected to move in 2026–2027 ([1] www.veeva.com). In some regions (Asia/Latin America) Veeva may sell legacy CRM into late 2024, but by 2030 Salesforce-based CRM will be discontinued. This somber deadline is motivating many pharmaceutical firms to prepare now. One industry brief explicitly notes, "2030 is approaching fast. Every pharma company using Veeva CRM will soon need a clear, executable migration path to Vault CRM" ([12] bridgeviewls.com) ([1] www.veeva.com).

Run riot with references:
By mid-2025 there will be dozens of companies either in progress or planning. Indeed, recent reports note that two top-20 pharma firms already went live on Vault CRM in early 2024, with more committed to begin deployment soon ([12] bridgeviewls.com) ([3] candf.com). Thus, it is critical for both decision-makers and technical teams to understand the migration requirements. The sections below provide a deep dive: historical context of Veeva, detailed migration roadmap, granular task checklist (see *Table 1*), data and integration best practices (see *Table 2*), illustrative case studies, and forward-looking considerations.

Evolution of Veeva CRM and Rationale for Migration

Veeva CRM on Salesforce: Successes and Limitations

Since its debut in the mid-2000s, Veeva's Salesforce-based CRM revolutionized pharma sales by systemizing call plans, detailing compliance, and connecting with Veeva Network on provider accuracy. Its market dominance (around 80% share ([20] intuitionlabs.ai)) was built on the agility of Salesforce's cloud platform. However, as the industry's needs grew, certain limitations emerged. Regulatory auditors increasingly scrutinize cloud applications; simultaneously, the proliferation of digital channels and data silos (e.g. between commercial and medical groups) created friction. Life sciences firms often found they had to heavily customize Salesforce to meet GxP requirements: custom Apex code, specialized validation workflows, and tailored data models. Over time, this technical debt became onerous.

Analysts note that Salesforce's one-size-fits-all platform began to impose constraints: complex code for audit trails, difficulty in synchronizing with regulatory content, and a clunky user interface for new capabilities ([4] bridgeviewls.com) ([12] bridgeviewls.com). Recognizing this, Veeva began developing Vault (released 2012) as an enterprise-grade cloud for quality, RIM, and content. By building CRM on Vault, Veeva aims to overcome the old trade-offs. Vault CRM runs natively in the regulated Vault framework: data is automatically versioned and auditable, and compliance rules exist as first-class features. Moreover, Vault CRM shares the same object model as Veeva's other Vault applications, enabling tighter out-of-the-box integrations (e.g. linking promotional materials in CLM directly to sales workflows).

New Capabilities of Vault CRM

Vault CRM retains all core features of legacy Veeva CRM (accounts, contacts, call reporting, territory management), but adds several life science-specific enhancements. For example, Vault CRM includes a **Multichannel Service Center** at no extra license cost ([22] bridgeviewls.com): a unified inbox for field requests and tasks across sales, marketing, and medical affairs. It also introduces an AI-driven "Vault CRM Bot" (expected in 2025) to assist reps with content retrieval and data entry ([22] bridgeviewls.com). According to Veeva, Vault CRM supports the full omnichannel engagement model including approved email and digital content, multi-device offline use, and direct mobile access to Vault content (previously limited to CLM apps).

Our sources emphasize connectivity: BridgeView notes Vault CRM is "already familiar to many of their Commercial Cloud customers who use Vault for managing digital content" ([4] bridgeviewls.com), meaning existing investments in Vault Vault Translate or Vault PromoMats can directly feed into CRM. In case studies, leading companies cite "faster access to critical data" and "AI-driven insights for smarter decision-making" as Vault CRM's value proposition ([23] www.slideshare.net) ([7] www.veeva.com). Notably, Vault CRM's architecture (multi-tenant Vault Platform) preserves the standard Salesforce-based data schema (all objects end in __v) while replacing Salesforce UI elements with Vault-optimized equivalents ([16] vaultcrmhelp.veeva.com) ([7] www.veeva.com). This ensures minimal disruption for end users in terms of core data fields, but necessitates migrating configuration and custom code.

Strategic Drivers for Life Sciences

The shift to Vault CRM aligns with broader industry drivers. In 2025, Veeva will embed generative AI and advanced analytics into its CRM – features that are cumbersome to retrofit into classical Salesforce instances. By migrating early, companies gain "early-mover advantage" in AI, per GSK ([7] www.veeva.com). Vault CRM's unified framework also supports integrated data analytics across commercial (CRM), medical (Vault MedComms), and quality (Vault QMS), addressing the need for a connected ecosystem. For instance, Boehringer Ingelheim views Vault CRM as foundational to its plan to launch 20 new drugs in 20 years ([24]

www.veeva.com); they expect shorter launch cycles by streamlining CRM processes and improving cross-team coordination.

Vendors beyond Veeva are reacting as well. Salesforce announced a **Life Sciences Cloud** in 2023 ([5] www.salesforce.com), targeting similar workflows on the Salesforce platform, and IQVIA is enhancing its CRM offerings. These moves confirm that the industry is jostling for next-gen CRM standards. In the end, many firms see Vault CRM as "purposely built for life science organizations" ([11] candf.com) and prefer to stay within the Veeva ecosystem rather than migrate to a non-specialized CRM. However, some are evaluating all options as part of this transition – underscoring the need for careful cost-benefit analysis up front.

Migration Roadmap and Timeline

Veeva's published roadmap (Table 1) lays out a multi-year transition. The anchor dates are Veeva's own announcements and press releases:

- **Apr 2024**: Vault CRM generally available; mandated for all *new* customers ([1] www.veeva.com).
- **2025**: Initial migrations of existing Veeva CRM clients begin; legacy CRM still available for limited new sales in some regions ([1] www.veeva.com).
- **2026–2029**: Majority of current customers will perform migrations ([1] www.veeva.com) ([3] candf.com).
- **2030**: End-of-life for Salesforce-based Veeva CRM; all support and development moves to Vault CRM.

These phases are driven by both Veeva's technical readiness and customer capacity. Notably, Veeva has contracted Accenture to support clients on migration strategy and "business process optimization" during the transition ([2] www.veeva.com). Figure below (Table 1) summarizes key timeline milestones.

Year/Phase	Key Activities
2023	Announcement of Vault CRM; initial beta programs; partner enablement (Accenture, others) ([2] www.veeva.com). Strategic planning begins.
2024	Vault CRM GA release (Apr 1, 2024) ([1] www.veeva.com). New customers onboarded on Vault CRM. Early adopters (pilot projects in US/EU) go live ([1] www.veeva.com). Veeva and partners develop migration tools and best practices.
2025	First migrations of existing CRM clients begin in earnest ([1] www.veeva.com). Typically smaller regions or voluntary early movers (e.g. one country or business unit). Planning and proof-of-concept deployments; extensive testing and training.
2026– 2029	Bulk migration window: most remaining customers transition. (Industry sources indicate most companies will finalize by 2029 ([3] candf.com).) Ongoing tech support, data migration, and user adoption focus.
2030	Final end-of-life for Salesforce-based Veeva CRM (per Veeva commitments). Legacy CRM rolled off; only Vault CRM (or alternate CRM) in production.

Table 1: Migration timeline (2023–2030) for shifting from Veeva CRM on Salesforce to Vault CRM ([1] www.veeva.com) ([3] candf.com).

These dates guide the *when* of migration. In parallel, the *how* involves multiple phases: discovery and planning, sandbox and pilot customization, data extraction, and cutover. The checklist below synthesizes tasks that fall under these phases.

Vault CRM Platform and Migration Considerations

Before diving into tasks, it is important to understand key architectural and integration considerations that shape the migration checklist:

- **Network Bridge Architecture**: Veeva employs its Network product to synchronize data across systems. The migration involves setting up a new "Vault CRM" *system entry* in Network and creating a *Vault CRM bridge* (configuration linkage) ([8] docs-vdm.veevanetwork.com). In practice, this means administrators will add a new system name in Network for Vault CRM, provide integration credentials, and link it via a bridge (akin to the existing Veeva CRM bridge) ([8] docs-vdm.veevanetwork.com). This enables Network to continue provisioning HCP/MCO/other data to Vault CRM post-migration.

- **Data Model and Object Mapping**: The Vault CRM data model retains the core Veeva (Salesforce) schema: accounts, contacts, events, etc., still exist (often with the same API names suffixed __v ([16] vaultcrmhelp.veeva.com)). However, there are new object types and differences: for example, Vault CRM uses *Field Permissions* instead of Salesforce's Field-Level Security, and introduces new objects like Permission Sets and Veeva Settings ([16] vaultcrmhelp.veeva.com). All existing custom objects (Account team hierarchies, custom event subtypes, etc.) must be reviewed. Veeva intends to automatically migrate "standard" data structures (standard objects and fields) but warns that *custom* code and objects must be manually rebuilt ([11] candf.com) ([12] bridgeviewls.com).

- **Customization & Code**: Any customizations (Apex classes/triggers, Visualforce pages, Lightning components) are not auto-converted. Organizations should inventory all custom logic in Salesforce and plan reimplementation. For example, BridgeView highlights "mapping and replicating custom-coded objects" as a core part of their migration framework ([12] bridgeviewls.com). This likely entails assigning developers to re-code business logic in Vault CRM's API (perhaps using Vault's new SDK or workflow rules). Custom formulas, validation rules, and triggers must be tested for compatibility.

- **Integrations**: Most significant is connectivity with external systems (marketing automation, analytics, telephony, etc.). Any integration that used the old Veeva SOAP/REST APIs, or hammer data exported from Salesforce tables, will need reconfiguration. Veeva's Network bridges may persist, but point-to-point integrations (e.g. Informatica jobs, middleware mappings) must be updated to target Vault CRM endpoints. BridgeView notes that managing "external data integrations" is often the "biggest risk" in migrations ([12] bridgeviewls.com) ([25] bridgeviewls.com). Thus tasks include cataloging all integrations and planning their transition path.

- **Security & Compliance**: Vault CRM uses the Vault security model: users belong to *Security Profiles* and *Permission Sets* (unlike Salesforce profiles). Security roles shift as well. Teams must map old profiles into Vault security profiles, ensuring adherence to GxP validations. Veeva documents note that layout profiles and Visualforce pages are deprecated, requiring alternate Vault components ([16] vaultcrmhelp.veeva.com) ([26] vaultcrmhelp.veeva.com). Organizations should review security designs: e.g. how will confidential fields be restricted in Vault (via Field Permissions) ([16] vaultcrmhelp.veeva.com).

- **User Interface Changes**: Vault CRM's UI is different from Salesforce. Training is needed on the new navigation, page layouts, and terminology (some tabs moved into a "CRM Setup" and View/edit screens changed) ([27] vaultcrmhelp.veeva.com). A critical task is preparing training materials that map old concepts to new ones (as documented by Veeva in resources on "transitioning to Vault CRM").

Understanding these migration-specific factors informs many of the tasks. The steps below (section **Checklist: 50 Key Tasks**) draw on this context and on published best practices.

Checklist: 50 Key Tasks Before Migration

Below, we present **50 discrete tasks** (grouped logically) that organizations should undertake prior to switching from Veeva CRM to Vault CRM. These tasks are drawn from vendor documentation, CRM migration best practices, and industry case studies. While not exhaustive for every scenario, they cover the core technical and organizational steps.

We categorize them into phases (Planning/Discovery, Pre-migration Prep, Technical Setup, Data Migration, and Cutover). Citations alongside tasks indicate sources that recommend or exemplify these actions.

Task #	Task Description
1	**Assemble a Cross-Functional Migration Team**. Identify executive sponsors, project managers, IT leads, data stewards, and change-management stakeholders. A migration of this scale requires a dedicated project governance structure ([12] bridgeviewls.com) ([28] moldstud.com).
2	**Define Migration Objectives and Success Criteria**. Establish clear goals (e.g. data quality improvements, user adoption targets, business outcomes). MoldStud recommends setting specific goals and KPIs up front so that "organizations that set specific goals experience a 20% increase in adoption rates" ([15] moldstud.com) ([29] moldstud.com).
3	**Conduct Impact Assessment (Actors & Processes)**. Perform change-impact analysis by user role (sales rep vs admin vs medical) to gauge training needs. GSK's approach (as documented) was to categorize field reps as "no impact" and admins as "high impact," tailoring training accordingly ([17] www.veeva.com). Prepare a communication plan around this.
4	**Inventory Current CRM State**. Audit all Salesforce orgs and Veeva CRM instances. Document custom objects, Apex code, Visualforce/Lightning pages, triggers, and workflows. For complex environments (e.g. multiple regional orgs), map out key variations ([30] craftware.com) ([12] bridgeviewls.com).
5	**Run Veeva Network Pre-Migration Report**. In Veeva Network, use the built-in **Pre-Migration Report** to see where the CRM system is used (subscriptions, filters, saved reports, etc.) ([9] docs-vdm.veevanetwork.com) ([31] docs-vdm.veevanetwork.com). Download and review the Excel report for lists of Veeva CRM references. This helps identify which connectors and configs must be updated ([32] docs-vdm.veevanetwork.com).
6	**Assess Data Quality**. Perform detailed data cleansing on key CRM objects (HCPs, Accounts, Collaborators, etc.). Eliminate duplicates and obsolete records. Industry benchmarks suggest ~30% of CRM contacts may be outdated ([15] moldstud.com). Gartner notes 55% of migrations falter on data quality ([28] moldstud.com). Use tools (like Veeva Data Tools or external deduplication apps) to merge duplicate HCPs and update records. Engage data governance teams to boost completeness.
7	**Archive/Retire Inactive Data**. Identify data (old campaigns, spent budgets, outdated compliance audits) that can be archived outside the new CRM. Removing clutter reduces migration volume. E.g. filter out records with no activities in 5+ years. Consider using Salesforce's archive tools for old Opportunities/HCPs before extraction.
8	**Review Compliance and Regulatory Requirements**. Ensure that migration scripts and tools will maintain audit trails. If CRM data is subject to FDA 21 CFR Part 11, plan for validation. Document that the Vault CRM environment will be validated. Collaborate with quality/compliance teams as needed.
9	**Engage Veeva and Partners Early**. Schedule kickoff meetings with Veeva Account Team, and consider partnering with a certified migration services provider. Veeva has enlisted Accenture for migration support ([2] www.veeva.com), and many customers work with Veeva partners (e.g. Craftware, BridgeView, C&F) for data migration expertise. Early engagement yields guidance on best practices and avoids surprises.

Task #	Task Description
10	**Document External Integrations and Flows**. Catalog all systems integrated with Veeva CRM: e.g. marketing automation (Marketo, Eloqua), ERP, analytics (Tableau, SalesLogix), CLM/Veeva Vault links, telephony (SIS), and third-party data feeds (IMS, Nielsen). Identify integration owners and note data flow directions. This aligns with BridgeView's warning that external integrations are often the migration's riskiest parts ([33] bridgeviewls.com).

Task #	Task Description
11	**Prepare Data Mapping and Transformation Plans**. For each integration or custom report, map source fields (Salesforce-based) to target Vault CRM fields. Plan any required data transformations (e.g. convert date formats, merge picklist values). This supports the "transform data into target format" step in Veeva's migration approach ([13] developer.veevavault.com).
12	**Plan Sandboxes and Environments**. Order necessary Vault CRM sandbox licenses ahead of time. Arrange at least one full CRM Sandbox and one or more Dev sandboxes for testing. Veeva requires migrations to be tested in sandbox environments before production, as per best practices ([13] developer.veevavault.com) ([14] developer.veevavault.com).
13	**Set Up Vault CRM in Veeva Network**. In the Vault CRM Bridge setup, create a new "Vault CRM" system in Network ([8] docs-vdm.veevanetwork.com). Add external credentials for a secure integration user that Vault CRM will use.
14	**Clone Target Subscription for Vault CRM**. In Network, duplicate existing target subscriptions meant for Veeva CRM but assign the new Vault CRM system ([8] docs-vdm.veevanetwork.com). This ensures the bridge is active and can pull the same master data (HCPs, etc.) into Vault CRM. Update any filters so that new HCPs from Vault CRM are captured.
15	**Configure Vault CRM Bridge**. Use Veeva Network's UI to "Create Vault CRM Bridge" based on the cloned subscription ([8] docs-vdm.veevanetwork.com). Validate that the bridge is created for your Vault CRM system. Note that multi-country bridges are default. If your business requires single-country isolation, adjust accordingly.
16	**Validate Bridge Connectivity**. After setup, verify the Network-Vault integration is working. Use Network logs or dashboards to confirm that sample data flows from a few key records (e.g. a test HCP) into Vault CRM. This step catches issues (credentials, firewall rules) early.
17	**Review and Update Connector Configurations**. Audit all Veeva Connectors, MQs, or other integration settings in Network that reference the old "Veeva CRM" system. Recreate or edit them to point to "Vault CRM" instead. For example, saved reports or target subscriptions with static filters based on "Veeva CRM source system" must be updated to include the Vault CRM source system as well ([32] docs-vdm.veevanetwork.com).
18	**Rebuild or Update Custom Settings**. In Vault CRM Setup, recreate any global custom settings that your business uses (as noted in Veeva docs, e.g. vleva_settings__v) ([16] vaultcrmhelp.veeva.com). These are typically one-off records holding system-wide parameters; ensure they have equivalent values in Vault CRM.
19	**Consolidate Org Structures (if applicable)**. If you have multiple Salesforce orgs (e.g. per region), plan if and how these will map to Vault CRM. Veeva supports multiple orgs per account, but you may choose to merge some business units. Document your final org architecture decisions.
20	**Re-map Territories and Roles**. Export the current territory definition from Salesforce and plan new territory assignments. Vault CRM uses a similar territory management model, but roles and visibility settings may differ. This is especially important if you rely on fine-grained territory hierarchies.

Task #	Task Description
21	**Checklist Data Migration Requirements**. Based on Veeva's "Vault Migrations" guidelines ([13] developer.veevavault.com) ([14] developer.veevavault.com), list all data migrations to perform: e.g. HCP master data, account hierarchies, activity records, forecast histories. For each, note volume and format. Identify any third-party migration tools or certified partners needed for large transfers.
22	**Backup Legacy CRM Data**. Before any data moves, take full backups of your current CRM (most CRM tools have export or backup utilities). This provides a rollback point. Use Veeva's Data Tools or use Salesforce Data Export to archive key objects (Contacts, Accounts, Calls, etc.). Store backups securely for auditing.
23	**Perform Initial Data Extraction**. Conduct test data extracts of key objects (All HCPs, Opportunities, Call Reports, etc.) and load a subset into a Vault Dev vault. Validate format compatibility. This iterative 'dry run' is recommended during a migration to verify mapping ([13] developer.veevavault.com). Document extraction methods (e.g. Salesforce API, CSV exports).

Task #	Task Description
24	**Data Transformation and Mapping**. In preparation for final migration, write scripts or ETL processes to transform the extracted data into Vault's API schema. Address differences such as picklist values or timestamp formats. Consult Vault API docs. Ensure fields like __v suffixes match Vault's naming conventions.
25	**Load Initial Data into Vault Sandbox**. Using Veeva's Bulk API or the Vault Data Loader, import the transformed data into a Vault sandbox for testing ([13] developer.veevavault.com). Then run a dry-run validation: check for record counts, errors, and data integrity. Perform multiple iterations as needed. This parallels Veeva's prescribed "dry runs" in a sandbox ([13] developer.veevavault.com).
26	**Record Validation and Quality Checks**. After each test load, run reporting queries in the Vault sandbox to verify data accuracy (e.g. spot-check random records). Use validation reports to compare source vs target. The migration plan should include at least one full validation of each major data set.
27	**Load Delta Changes**. Plan for a final synchronization of data changes that occurred after the initial snapshot. Typically, migrate most data in batches while old CRM is still active, then perform a "delta load" of only new or updated records right at cutover (often done over a weekend) ([34] developer.veevavault.com).
28	**Rebuild Custom Code in Vault CRM**. Using Vault's development tools or SDK, re-create any design-based automations (calculations, default values) that were in Apex. For example, if Salesforce had a trigger to populate a status field, implement equivalent Vault rules. Document each piece of logic and its new implementation.
29	**Modify Workflow Rules/Approval Processes**. Re-create any workflow or approval rules in Vault CRM (which may use the Vault workflow engine). For instance, reconfigure any multi-stage approvals for chatty CRM processes using Vault's "Workflow Action" feature.
30	**Redefine Page Layouts and Tabs**. In Vault CRM, create page layouts and app sections. Map existing page layouts from Salesforce (account page, call page, etc.) to Vault CRM. Note that Veeva suggests using "App Controls and Sections" in place of some Salesforce page features ([16] vaultcrmhelp.veeva.com). Test that all essential fields are visible and read-only settings are correct.

Task #	Task Description
31	**Configure Vault-Specific Objects**. Set up new Vault CRM-specific objects (e.g. Veeva Messages, Free Text Agent objects, Section Signals) as needed. Some business rules may move into these objects. For example, if Salesforce used chatter notifications, you may use Vault Messages in Vault CRM.
32	**Set Up CRM Mobile & Offline**. Ensure that mobile-enabled fields and offline configurations are set. Vault CRM supports Vault Mobile (for iPad/Android). Configure which objects and layouts are available offline in the Vault Mobile app. If field reps used Salesforce offline, rebuild offline profiles in Vault.
33	**Train IT/Admin Staff on Vault CRM Features**. Familiarize the admin team with Vault's UI, data loader, and admin tools (such as the CRM Setup tab collection) ([27] vaultcrmhelp.veeva.com). Veeva provides documentation on transitioning to Vault CRM terms; administrators should review sections on new concepts (Field Permissions, Section Attributes, etc.) ([27] vaultcrmhelp.veeva.com) ([26] vaultcrmhelp.veeva.com). Possibly engage a training partner.
34	**Develop End-User Training Materials**. Prepare documentation and training programs for sales and medical teams. Use Veeva's "Transitioning to Vault CRM" guides to highlight differences in terminology and workflow ([27] vaultcrmhelp.veeva.com) ([17] www.veeva.com). Incorporate screenshots of Vault CRM. Plan role-based training on the new CRM UI.
35	**Update Reports and Dashboards**. Identify all Salesforce report canvases and dashboards feeding on CRM data. Rebuild equivalent reports in Vault CRM (which may use saved searches or Veeva Reports). Note that some report features may change (e.g. no Salesforce report builder; use Vault's search query interface).
36	**Test Inter-system Flows**. Execute end-to-end tests of critical processes: e.g. making a call in Vault CRM should still trigger an email to medical review in Vault MedComms, or booking an order should flow to ERP. Check that any scheduled jobs (like nightly data syncs to data warehouse) are updated to connect to the Vault CRM API.
37	**Parallel Testing**. For a transition period, consider running Salesforce CRM in parallel to Vault CRM on a limited data set. For example, maintain Salesforce read-only for recent activity while giving Vault CRM to a test region for daily

Task #	Task Description
	use. This can validate migration readiness.
38	**Final Data Cutover Plan**. Define the precise cutover window. Typically, align with a quiet business period (e.g. weekend) and communicate in advance. Prepare rollback plans: what to do if something fails. Based on Veeva's advice, inform Veeva Technical Ops at least three business days before a large migration (over thresholds like 500k records) ([14] developer.veevavault.com).
39	**Execute Final Data Migration**. During cutover window, perform the planned steps: disable intake on legacy CRM, run final delta extract from Salesforce, load into Vault CRM, and run data integrity checks. Ensure no data entry happens in Salesforce after freeze.
40	**User Acceptance Testing (UAT)**. In the Vault CRM production org, conduct UAT with business users: verify sales reps can log calls, completeness of migrated data, reports are correct, and mobile works. Use test scripts that cover all major functions. Address any defects immediately.

Task #	Task Description
41	**DNS/URL and Login Setup**. Ensure all user accounts are provisioned in Vault CRM (SAML/SSO if used). Update any bookmarks or links (for instance, the "Veeva CRM" tab in Veeva Network now points to Vault CRM). If using single sign-on, configure the new application endpoint for Vault CRM.
42	**Enable Vault CRM Service Center**. If using the Service Center (embedded ticketing within Vault CRM), bin any legacy ticket associations and configure queues and routing in Vault CRM. For example, reassign open tickets or inbound mailboxes.
43	**Reconfigure Email-to-CRM processes**. If reps emailed call notes to Salesforce or submitted CLM forms via email, update these to Vault CRM. Configure Vault CRM's metadata rules for any new email triggers.
44	**Data Reconciliation**. After cutover, run reconciliation reports to ensure record counts match expected numbers (e.g. number of contacts, number of visits). Investigate any discrepancies. The MoldStud guide emphasizes verifying each data load to avoid errors ([15] moldstud.com) ([28] moldstud.com).
45	**Decommission Legacy CRM**. Once Vault CRM is verified, shut down legacy services. Remove any scheduled database jobs or middleware tasks pointing to Salesforce. Ensure data retention policies are applied for the old system.
46	**Post-Go-Live Support and Hypercare**. Provide dedicated support (helpdesk, on-call admins) for a few weeks after the go-live. The Craftware case study notes that Craftware provided "hypercare and post-go-live support" with on-the-spot fixes ([35] craftware.com). Gather user feedback and address urgent issues.
47	**Continuous Data Quality Monitoring**. Establish ongoing checks in the new CRM (e.g. dashboards showing duplicate rates or sync errors). MoldStud suggests planning for regular audits post-migration to catch drift ([36] moldstud.com). Resolve any data defects uncovered.
48	**Performance and Usage Metrics**. Track key metrics after launch: system performance, user login rates, data sync latency. Compare against pre-migration baselines. This helps quantify migration success (another recommended KPI).
49	**Iterate and Enhance**. Vault CRM will evolve. Plan for iterative improvements (phase 2 migrations for any deferred features, adding new Vault capabilities like pre-call use). Implement feedback loops with end-users to refine processes.
50	**Document Lessons Learned**. After stabilization, hold a post-mortem. Document what went well and what didn't, updating the organization's knowledge base for future projects. Incorporate these lessons into broader digital strategy.

Table 2: Data Migration Best Practices (adapted from CRM industry reports) ([15] moldstud.com) ([28] moldstud.com).

(Note: Tasks above are illustrative. Specific organizations may combine, expand, or reorder these steps based on their complexity and governance processes. What matters is that each major area — planning, data, integration, testing, cutover, and user adoption — is thoroughly addressed.)

Data Quality, Testing, and Evidence-Based Practices

Data integrity is the foundation of a successful CRM migration. Industry studies emphasize that poor data quality is a top risk: one report finds **30% of CRM data is inaccurate** if not cleaned ([15] moldstud.com), and Gartner research cited in MoldStud shows 55% of migration projects hit issues due to data problems ([28] moldstud.com). Life sciences companies must therefore enforce rigorous data cleansing and validation.

In practice, this means establishing data quality checkpoints at every phase:

- **Before Migration**: Audit existing data for completeness and consistency. For example, ensure all HCP records have valid identifiers (NPI, IDs) and required compliance data (e.g. DEAs). Merge duplicate accounts. Data migration partners often recommend achieving ≥95% accuracy before cutover ([28] moldstud.com) ([12] bridgeviewls.com).
- **During Testing**: Use test loads to identify mismatches. For instance, if a lookup field in Salesforce did not transfer, identify it and adjust mappings. Keep a log of all mapping issues for resolution.
- **After Go-Live**: Run reconciliation reports to verify no records were lost. Validate that roll-up summaries and calculations yield expected totals. Any audit trail discrepancies should be logged and fixed promptly.

Anecdotally, companies like GSK have emphasized "tech remediation and data cleanup as prework" ([37] www.veeva.com) before migration, underscoring the importance of upfront data effort. They treated the CRM as an "enterprise nervous system" and devoted time early on to cleaning it, rather than scrambling after the fact ([37] www.veeva.com).

Beyond data, project validation is also critical. Veeva's migration guide itself prescribes multiple dry runs in sandbox environments ([13] developer.veevavault.com). We strongly align with industry best practices (e.g. QA Madness/MoldStud) that advocate iterative testing: **"perform dry runs for loading and verification of data ... in a sandbox"**, then a final validation in the production vault ([13] developer.veevavault.com). Performance testing should also be done: Vault's documentation warns that multi-threaded extraction is limited (object API supports at most 2 threads) ([13] developer.veevavault.com), so schedule migration durations accordingly. In summary, a data-driven approach – with metrics at each milestone (defect rates, load times, user feedback scores) – should guide the project, as opposed to guesswork.

Case Studies and Real-World Examples

Several early adopter initiatives illuminate the migration process:

Global Biopharma (Craftware case study): A leading global pharma undertook a "large-scale, multi-region transformation" with Vault CRM ([38] craftware.com). Their environment was highly complex (multiple orgs, heavy Apex customizations, dozens of external integrations) ([39] craftware.com). Craftware reports that this project assembled 30+ specialists to cover Agile PM, developers, integration teams and hypercare ([40] craftware.com) ([35] craftware.com). Key lessons from this case include: using agile governance to align stakeholders across geographies, actively migrating legacy APEX logic to Vault-based implementations, and closely managing compliance (GxP) through every step. The project emphasized *cross-functional collaboration* – for example,

pairing Veeva consultants, global IT, and field leadership – to avoid silos. Ultimately, after go-live, the company moved quickly to leverage Vault CRM's innovations (e.g. embedding AI-driven agents in calls).

GSK (Case study): GSK publicly announced its migration to Vault CRM as an "early-mover advantage with AI" ([7] www.veeva.com). GSK's CIO likened the CRM to a shared "nervous system" and built the migration plan around next-gen AI use cases ([7] www.veeva.com). In practice, GSK began planning immediately (almost on announcement), and structured their workstreams with Veeva: they conducted architecture reviews, advanced data remediations, and persona-based training from the start ([7] www.veeva.com) ([17] www.veeva.com). One concrete outcome: by migrating early, GSK aimed to use Vault's built-in AI tools (e.g. Pre-call Agent and Voice Agent) as soon as possible ([7] www.veeva.com). According to GSK, over **18,000 users** across 50+ countries will be live by end of year 2025 ([41] www.veeva.com), and early adoption freed their team from "CRM beauty parades" with vendors ([41] www.veeva.com). GSK's example highlights the benefit of extensive pre-migration planning and treating the migration not merely as a lift-and-shift but as a foundational digital strategy.

Boehringer Ingelheim (Case study): Boehringer's strategy focused on launching many new products ("20 launches in 20 years") and needed a CRM that could scale ([24] www.veeva.com). They worked with Veeva Business Consulting to design an operating model for Vault CRM that emphasized inter-team "connected customer engagement" ([18] www.veeva.com). The Boehringer team prioritized designing the system to encourage desired sales rep behaviors ("What behaviors do we want to enable and encourage?") and used recency/engagement AI features to increase field efficiency ([18] www.veeva.com). They specifically mention leveraging Vault's audio and text-based compliance checks (Free Text Agent) to auto-flag unsafe statements in real-time ([42] www.veeva.com). Boehringer prepared for Vault's AI pipeline by setting up structures so that future Vault enhancements plug into their CRM. Their Case Study indicates a staged rollout, integrating Vault CRM with their Veeva PromoMats and data platform (Veeva Link) to create an end-to-end data ecosystem.

These examples illustrate some common themes: build deep subject-matter expertise (partners acted as accelerators in each), focus on data/integration as a project phase, and use the migration as an opportunity to reimagine processes (not just copy the old CRM wholesale).

Implications and Future Directions

The shift to Vault CRM has broad implications:

- **Vendor Ecosystem and Competition**: With Salesforce's Life Sciences Cloud and IQVIA's CRM products on the scene, life sciences companies have more CRM choices than ever ([5] www.salesforce.com) ([12] bridgeviewls.com). Some organizations may use the migration event to re-evaluate their CRM strategy (e.g. consider a branch to Salesforce LS Cloud). At the same time, Vault CRM's deep integration with other Veeva products (RIM, Quality, Link data) will likely lock in many customers who want a unified view. Partners like C&F argue that sticking with Veeva is generally safer as "solution purpose-built for life sciences" ([11] candf.com).

- **Internal Adoption and Skills**: On the human side, Vault CRM brings a learning curve. Field teams and IT staff must adapt to Vault's terminology (Section Attributes, Security Profiles) and mobile experience. Training and change management costs can be significant ([17] www.veeva.com) ([16] vaultcrmhelp.veeva.com). In the long run, CRM admin skills will shift from Salesforce/traditional CRM to Vault/VaultCDO skills. This may require hiring or upskilling admin staff.

- **Data Strategy**: Vault CRM centralizes more data on one platform. Companies can potentially tie commercial CRM data directly with clinical trial registries (via Veeva Link/MasterData) or post-market surveillance data (Rim) in novel ways. The ability to run AI queries across these datasets could transform customer engagement. For instance, sales leaders could use Veeva AI to target HCPs with specific prescribing patterns, blending CRM and prescription data seamlessly. Early adopters are positioning themselves for this.

- **Regulatory/Quality**: By using Vault (a validated platform) for CRM, companies reduce the risk of compliance issues in sales processes. Vault's audit trails and release management (already used in Quality and R&D) now extend to CRM. This may improve inspection readiness for commercial activities (e.g. Sunshine Act reporting, which is being unified by some companies through Veeva systems).

- **Future Upgrades and Maintenance**: With CRM on Vault, Veeva can deliver upgrades continuously without the synchronization challenges of Salesforce releases. Customers will need to engage in Vault's twice-yearly or quarterly release cycles instead of Salesforce's cadence. On the plus side, Vault CRM releases will likely be aligned with Veeva's industry development priorities (e.g. AI features).

In sum, migrating to Vault CRM is not merely a technical lift: it enables a modernization of life sciences commercial IT. Over the next decade, we expect most firms to either adopt Vault CRM or choose a competitor's specialized solution. The migration projects of 2025–2030 will shape commercial operations for years to come.

Conclusion

Transitioning from Veeva's Salesforce-based CRM to the new Vault CRM platform is a complex, multi-year endeavor with high stakes for life sciences companies. Through meticulous planning and execution of the tasks outlined above, organizations can navigate this change with minimal disruption. Key recommendations include: performing comprehensive pre-migration data audits ([15] moldstud.com) ([28] moldstud.com), leveraging automation for export/import ([43] moldstud.com), and involving expert partners for custom code and integration challenges ([12] bridgeviewls.com) ([2] www.veeva.com). Our review of press releases, partner case studies, and best-practice guides leads to the conclusion that **no major Veeva CRM user can afford to delay**. The coming years will see Vault CRM's capabilities fully mature (with advanced AI and pervasive compliance checks) and crystallize life sciences CRM standards. Companies that execute the 50 tasks above will position themselves to reap the benefits: a future-proofed CRM environment, unified data platforms, and ultimately, better engagement with patients and providers.

All claims and data in this report are supported by authoritative sources: official Veeva communications ([1] www.veeva.com) ([2] www.veeva.com), consulting analyses ([4] bridgeviewls.com) ([12] bridgeviewls.com), industry research ([15] moldstud.com) ([28] moldstud.com), and documented customer experiences ([7] www.veeva.com) ([40] craftware.com), as cited throughout. The migration roadmap and checklist summarized here should serve as a definitive guide for businesses undertaking this critical transformation.

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