

# Veeva vs IQVIA vs Salesforce: 2025 Life Sciences CRM Guide

By Adrien Laurent, CEO at IntuitionLabs • 12/31/2025 • 40 min read

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# Veeva vs IQVIA OCE vs Salesforce Life Sciences Cloud: 2025 Comparison

**Executive Summary:** This report provides an in-depth comparative analysis of three leading life sciences CRM platforms as of late 2025: **Veeva Vault CRM** (from Veeva Systems), **IQVIA Orchestrated Customer Engagement (OCE)**, and **Salesforce Life Sciences Cloud**. The life sciences industry (pharmaceuticals, biotechnology, medical devices) has unique CRM requirements – it must support stringent regulatory compliance (FDA, EMA, HIPAA, GDPR, Sunshine Act, etc.) while [managing complex, data-rich interactions with healthcare professionals \(HCPs\)](#), patients, and institutions (<sup>[1]</sup> [www.gartner.com](http://www.gartner.com)). Life sciences companies have increasingly moved toward cloud-based, omnichannel CRM solutions, driven by factors such as the post-COVID shift to remote/virtual engagement and the rise of AI. In this context, **Veeva** has been the long-time market leader (estimated ~80% global market share (<sup>[2]</sup> [www.zensar.com](http://www.zensar.com))), offering a specialized cloud suite (Commercial Cloud, Vault applications) tailored to pharma/biotech needs. **IQVIA OCE** is known for its integrated data and analytics pedigree (leveraging IQVIA's OneKey HCP data, claims, patient records, etc.) and serves roughly 400 global customers across 130 countries (<sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com)) (<sup>[4]</sup> [www.zensar.com](http://www.zensar.com)). In 2024–2025, **Salesforce** has entered this space ambitiously by launching Life Sciences Cloud (built on its Einstein 1 platform), in partnership with IQVIA (licensing IQVIA's OCE technology and data) (<sup>[5]</sup> [www.iqvia.com](http://www.iqvia.com)) (<sup>[6]</sup> [www.zensar.com](http://www.zensar.com)). These three solutions differ in origin, technical architecture, feature focus, and strategic partnerships:

- **Veeva Vault CRM** (GA April 2024) runs on Veeva's own Vault data platform (formerly built on Salesforce, but decoupled in 2023 (<sup>[7]</sup> [www.zensar.com](http://www.zensar.com))) and is packaged within Veeva's Commercial Cloud. It emphasizes comprehensive regulatory compliance (e.g. validated system for GxP, HIPAA-ready modes), unified content management (promotional, medical, training materials), sample/specimen tracking, and integrated analytics (e.g. Veeva Compass, Veeva Link). Veeva has announced advanced AI features (Vault CRM Bot and Voice Control) for late 2025 (<sup>[8]</sup> [ir.veeva.com](http://ir.veeva.com)). Veeva Systems serves over 1,000 life sciences organizations (<sup>[9]</sup> [ir.veeva.com](http://ir.veeva.com)) and reported FY2025 revenues of ~\$2.75 billion (up 16% YoY) (<sup>[10]</sup> [ir.veeva.com](http://ir.veeva.com)). Its solution is mature and widely adopted, but relatively costly and forms a closed ecosystem.
- **IQVIA OCE** (launched 2017 (<sup>[11]</sup> [www.iqvia.com](http://www.iqvia.com))) is built on the Salesforce platform (<sup>[6]</sup> [www.zensar.com](http://www.zensar.com)) and leverages IQVIA's vast healthcare data (OneKey HCP/HCO registry, medical claims, sales/Rx, etc. (<sup>[12]</sup> [www.zensar.com](http://www.zensar.com))). It supports omnichannel engagement (CLM, email, meetings, events, etc.) and has AI-enhanced "Next Best Action" recommendations (OCE+ since 2018 (<sup>[4]</sup> [www.zensar.com](http://www.zensar.com))). IQVIA will maintain and support OCE through at least 2029 (<sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com)), serving ~400 customers worldwide (<sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com)). In April 2024, IQVIA and Salesforce announced a strategic alliance: IQVIA will license the OCE CRM software to Salesforce and co-develop Salesforce's Life Sciences Cloud (LS Cloud), with an expected launch of the unified platform in 2025 (<sup>[5]</sup> [www.iqvia.com](http://www.iqvia.com)). This partnership (described by IQVIA as "bringing the best of our combined capabilities in data, AI and technology" (<sup>[13]</sup> [www.iqvia.com](http://www.iqvia.com))) is intended to transition OCE customers to the new Salesforce offering over ~4–5 years (<sup>[6]</sup> [www.zensar.com](http://www.zensar.com)). A longstanding source of tension is Veeva's 2017 antitrust lawsuit against IQVIA (pending trial in early 2025) over data access issues (<sup>[14]</sup> [www.assemblestudio.com](http://www.assemblestudio.com)), which underscores how data licensing and ecosystem lock-in affect life sciences CRM choices.
- **Salesforce Life Sciences Cloud**, announced in 2023 and rolling out in 2024, is Salesforce's **industry cloud** built on its Einstein 1 Data Cloud and digital labor technologies. It aims to provide a unified, AI-driven platform for commercial and clinical operations in pharma/medtech. Unlike standard Sales/Service Cloud, it includes specialized modules such as **Commercial Operations** (offering AI-enabled sales insights and predictive analytics via Tableau) and **Clinical Operations** (including Data Cloud for Health and chain-of-

custody/ [participant management for trials](#)) (<sup>[15]</sup> [www.salesforce.com](#)) (<sup>[16]</sup> [www.salesforce.com](#)). It is HIPAA-ready, [GxP-compliant](#) (<sup>[17]</sup> [investor.salesforce.com](#)), and emphasizes an AI agent workforce (Agentforce) to analyze data flowing from multiple sources (e.g. actual claims, EHR, publishing channels) (<sup>[18]</sup> [investor.salesforce.com](#)) (<sup>[19]</sup> [investor.salesforce.com](#)). Pricing (as published) is roughly \$350/user/month for the Enterprise edition and \$525 for Unlimited (<sup>[20]</sup> [www.salesforce.com](#)) (<sup>[21]</sup> [www.salesforce.com](#)), with add-ons like Agentforce (~\$750) and a base Customer Engagement edition (~\$150) (<sup>[20]</sup> [www.salesforce.com](#)) (<sup>[22]</sup> [www.salesforce.com](#)). The Salesforce offering is relatively new in life sciences, and in practice sales automation for pharma customers only became generally available after Sept 2025 (<sup>[23]</sup> [www.iqvia.com](#)). Salesforce is leveraging a large partner network (including top consulting firms like Bain, BCG, McKinsey) to aid life sciences deployments (<sup>[24]</sup> [investor.salesforce.com](#)).

**Key findings:** Veeva remains the incumbent leader with deep regulatory integration and broad product depth, but is countercyclical to Salesforce's agility and ecosystem. IQVIA's OCE brings rich data and analytics that are now folding into Salesforce's platform. Each platform has strengths: Veeva's single-vendor integrated suite simplifies governance, IQVIA's OCE offers unmatched market data and domain expertise, and Salesforce's LS Cloud promises cutting-edge AI and interoperability. Real-world use cases are emerging: for example, an industry report notes that AbbVie uses Veeva CRM's predictive analytics, Sanofi has customized IQVIA OCE for clinical trial follow-ups, and AstraZeneca has deployed Salesforce tools to monitor oncologist engagement (<sup>[25]</sup> [rss.globenewswire.com](#)). With the industry's ongoing digital transformation and fast adoption of generative AI (spurred by LLMs like ChatGPT) (<sup>[26]</sup> [www.zensar.com](#)), life sciences companies will need to weigh long-term strategic fit – including innovation roadmaps, implementation cost, and data governance – when choosing among these platforms. Overall, this report examines the history, architecture, feature sets, adoption metrics, case examples, and future outlook of Veeva, IQVIA OCE, and Salesforce Life Sciences Cloud, supported by extensive data and expert insights.

## Introduction and Background

The pharmaceutical, biotechnology, and medical device sectors face unique commercial and scientific challenges that set them apart from other industries. Chief among these is the need to manage highly regulated relationships with healthcare professionals (HCPs), key opinion leaders (KOLs), healthcare organizations (HCOs), and patients while adhering to stringent compliance requirements (FDA/EMA regulations, HIPAA, GDPR, Sunshine Act, etc.) (<sup>[1]</sup> [www.gartner.com](#)). Life sciences Customer Relationship Management (CRM) systems are thus "purpose-built for pharmaceutical, biotechnology, medical device and diagnostics organizations" to enable "compliant engagement across the entire customer life cycle" (<sup>[1]</sup> [www.gartner.com](#)). Core functions of a life sciences CRM include tracking all sales and medical outreach activities (such as sample distribution, promotional meetings, speaker programs), ensuring content is approved by medical/legal/regulatory review before use, and capturing detailed audit trails for interactions. They must also support complex sales models (e.g. by specialty, multi-indication therapies) and integrate medical/scientific content delivery alongside commercial messaging.

Historically, large pharma companies initially relied on generic CRM or homegrown systems, which proved inadequate for the industry's complexities. **Veeva Systems**, founded in 2007, was one of the first to offer a dedicated cloud-based CRM for life sciences (<sup>[27]</sup> [www.assemblestudio.com](#)). In the mid-2000s, the visionaries behind Veeva extended [Salesforce.com](#)'s cloud platform with Modules offering promotional content management and validation workflow, ushering in a new era where pharma reps could "streamline all the compliances that can complicate the customer experience" in a single cloud platform (<sup>[27]</sup> [www.assemblestudio.com](#)). Over time, Veeva expanded this Commercial Cloud with tightly integrated applications for content ("Vault PromoMats"), medical information, events, and CRM analytics, and also developed a parallel Quality & Regulatory suite of Vault applications (for R&D, clinical, quality processes). Veeva's solutions were built under GxP validation processes

(following FDA 21 CFR Part 11 guidelines) and with mandatory auditability, giving it a compliance edge in the industry.

**IQVIA** (formed by the 2016 merger of Quintiles and IMS Health) has traditionally been a giant in healthcare data, analytics, and clinical research. While IQVIA offers a broad life sciences technology stack, its commercial CRM presence solidified with the launch of **Orchestrated Customer Engagement (OCE)** in 2017 <sup>[11]</sup> [www.iqvia.com](http://www.iqvia.com)). OCE was designed on the Salesforce platform <sup>[6]</sup> [www.zensar.com](http://www.zensar.com)) as an omnichannel CRM and marketing orchestration suite, enriched by IQVIA's syndicated data assets. IQVIA has leveraged its OneKey HCP/HCO reference database, claims/Rx data, and patient/payer information as part of the OCE ecosystem <sup>[12]</sup> [www.zensar.com](http://www.zensar.com)). OCE's feature set (later enhanced as "OCE+" in 2018) introduced machine-learning-driven next-best-action recommendations to guide field reps and marketers <sup>[4]</sup> [www.zensar.com](http://www.zensar.com)). In the late 2010s and early 2020s, OCE gained several hundred pharma/biotech clients globally (IQVIA reports ~400 customers in 130+ countries <sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com))).

**Salesforce**, long the #1 CRM vendor in general, had up to 2023 not offered a life-sciences-specific edition of its software. It primarily served large health organizations through its Health Cloud, which addressed patient data and care coordination. In November 2023 (Dreamforce '23), Salesforce introduced **Life Sciences Cloud**, explicitly targeting pharma and medtech, and codifying capabilities around clinical trials, patient recruiting, and HCP/patient engagement <sup>[28]</sup> [www.salesforce.com](http://www.salesforce.com)). In 2024, Salesforce expanded its Life Sciences offering in partnership with IQVIA: IQVIA licensed OCE technology to Salesforce and will jointly develop future Life Sciences Cloud enhancements <sup>[5]</sup> [www.iqvia.com](http://www.iqvia.com)). Salesforce positions this agent-centered platform (powered by its Einstein 1 Data Cloud) as a "trusted, secure platform" that streamlines drug development lifecycles and personalizes stakeholder engagement via data and AI <sup>[28]</sup> [www.salesforce.com](http://www.salesforce.com)).

This report examines these three platforms in depth. It discusses the market context (market size, growth, digital transformation trends), then details each solution's provenance, architecture, and capabilities. We analyze implementation factors, technical integration (AI, data, analytics), customer adoption metrics, and cite case examples. Finally, we discuss the strategic implications for life sciences companies and where the CRM space is headed, especially as generative AI and digital health continue to evolve.

## Market Landscape and Industry Trends

The life sciences CRM market is substantial and rapidly growing. A January 2025 market report estimated the global pharmaceutical and biotech CRM software market at approximately **US\$7.21 billion in 2024**, growing at a projected 15.2% CAGR to about \$20.0 billion by 2033 <sup>[29]</sup> [rss.globenewswire.com](http://rss.globenewswire.com)). North America is the largest region (44.5% of 2024 sales) <sup>[30]</sup> [rss.globenewswire.com](http://rss.globenewswire.com)), reflecting the concentration of large pharma in that market. Voice-of-analyst reporting indicates that roughly 57–58% of life sciences CRM deployments are now cloud-based <sup>[30]</sup> [rss.globenewswire.com](http://rss.globenewswire.com)), underlining the industry's shift away from legacy on-premises systems. Large enterprises (57.1% of the market) dominate adoption <sup>[30]</sup> [rss.globenewswire.com](http://rss.globenewswire.com)), in line with pharma/biotech companies' size.

A number of broad technology trends drive this growth. The COVID-19 pandemic accelerated the move to virtual and omnichannel engagement – pre-2020, many companies were already shifting toward inside sales teams and digital channels as HCPs had less time for in-person visits <sup>[31]</sup> [www.zensar.com](http://www.zensar.com)). During 2020–2024, life sciences organizations significantly expanded digital marketing, e-detailing, and remote monitoring. For example, the market analysis notes that by early 2025, nearly 90% of healthcare/life sciences firms had **not yet** realized their full digital transformation goals <sup>[32]</sup> [www.salesforce.com](http://www.salesforce.com)), indicating room for CRM modernization. At the same time, the explosion of AI and machine learning (e.g. 2023's release of GPT-4 and other generative models) has intensified interest in embedding intelligence in CRM systems <sup>[26]</sup> [www.zensar.com](http://www.zensar.com)). All the major CRM vendors are now incorporating AI-assisted features: from predictive lead scoring to generative content creation and AI agents. For instance, one industry blog highlights that companies like Aktana and Tact.ai are

converging conversational AI with field execution tools (<sup>[33]</sup> [www.zensar.com](http://www.zensar.com)), illustrating how closely CRM is intertwining with AI.

These trends are underscored by data on complexity: life sciences enterprises typically juggle dozens of separate IT systems. Salesforce data reports that, on average, a pharmaceutical or medical device manufacturer uses **78 different systems** and generates roughly **36% of the world's data** (of which 90% is unstructured) (<sup>[18]</sup> [investor.salesforce.com](http://investor.salesforce.com)). This points to a massive integration challenge: CRM platforms must not only manage interactions, but also harmonize data from lab, manufacturing, supply chain, patient engagement, and commercial channels. Salesforce's solution is to provide an "open ecosystem" (via MuleSoft, Salesforce Data Cloud, etc.) to unify real-time claims, clinical, and behavioral data from various sources (<sup>[34]</sup> [investor.salesforce.com](http://investor.salesforce.com)) (<sup>[19]</sup> [investor.salesforce.com](http://investor.salesforce.com)).

The competitive landscape beyond the three primary vendors is fragmented. Veeva's dominance (estimated ~80% share (<sup>[2]</sup> [www.zensar.com](http://www.zensar.com))) has historically limited room for challengers, but new entrants and alternatives exist. Other CRM offerings for pharma include Exeevo (a Microsoft Dynamics-based suite with content and event management) and Zaidyn (by ZS Associates, leveraging commercial data and AI) (<sup>[35]</sup> [www.zensar.com](http://www.zensar.com)). Several US-based products (Synergistix CATS, Close-Up CRM, Tika) serve niche needs with lower cost, limited features (<sup>[36]</sup> [www.zensar.com](http://www.zensar.com)). However, none of these have the scale or support of Veeva, IQVIA, or Salesforce. Thus, as summarized by industry analysts, Veeva currently holds "around 80%" of the worldwide life sciences CRM market (<sup>[2]</sup> [www.zensar.com](http://www.zensar.com)), although imminent changes (Salesforce's entry and the IQVIA deal) threaten to reshape that share.

In summary, the market context is one of booming demand for industry-specific CRM (driven by cloud adoption and AI), with Veeva as the entrenched leader. Salesforce's heavyweight entry (backed by IQVIA data) in 2024–2025 has the potential to disrupt this status quo. Life sciences organizations are now evaluating CRM not just on traditional CRM metrics, but on criteria like data integration, AI capability, and global compliance management – all in a hyper-growth market projected to nearly triple by 2033 (<sup>[29]</sup> [rss.globenewswire.com](http://rss.globenewswire.com)).

## Veeva Systems

**Company and Product Overview:** Veeva Systems (NASDAQ: VEEV) is a publicly traded company (also a public-benefit corporation) focused exclusively on cloud software for the global life sciences industry (<sup>[9]</sup> [ir.veeva.com](http://ir.veeva.com)). Founded in 2007 by former Salesforce executives, Veeva initially built its commercial CRM on top of the Salesforce platform, tailored to pharmaceutical needs. The company's flagship offerings are now organized under the **Veeva Vault Platform** (for regulated content and quality processes) and the **Veeva Commercial Cloud** (for sales, marketing, medical affairs, and data management). Key products include Vault (with applications for R&D and quality compliance), Vault CRM (promotional and medical CRM), Vault PromoMats (content/materials management), Vault RIM/QMS, Veeva Network (master data for HCPs/HCOs), Veeva Link (commercial data subscriptions), and Veeva Compass (analytics on prescriber/patient trends).

**Technology and Architecture:** In mid-2024, Veeva made a pivotal announcement that its CRM would move off the Salesforce platform onto its own infrastructure (<sup>[7]</sup> [www.zensar.com](http://www.zensar.com)) (<sup>[37]</sup> [www.zensar.com](http://www.zensar.com)). The new **Vault CRM** (GA April 2024) uses Veeva's proprietary cloud and maintains the same underlying data model and user experience, but with greater architectural flexibility (<sup>[7]</sup> [www.zensar.com](http://www.zensar.com)). Existing Veeva Commercial Cloud customers (using the older Salesforce-based CRM) entered a "stability mode" in which the core data model and front-end remain fixed, to enable a smooth migration to Vault CRM (<sup>[37]</sup> [www.zensar.com](http://www.zensar.com)). In fact, Veeva reports that existing Veeva CRM (Salesforce) will be supported through **September 2030** (<sup>[38]</sup> [www.zensar.com](http://www.zensar.com)), allowing a gradual transition. Notably, Vault CRM has built-in integrations with Microsoft Office/Outlook (<sup>[39]</sup> [www.zensar.com](http://www.zensar.com)) to minimize disruption. Veeva also emphasizes interoperability: the new Vault CRM is designed to seamlessly import any existing content from Vault Content customers, and Veeva Network continues as the golden record of customers and accounts.

**Regulatory Compliance:** Veeva's long-term mantra has been "Regulatory Compliance First." All Vault applications are designed and maintained under FDA 21 CFR Part 11 validation and Good Practice (GxP) standards. Vault CRM in particular is said to be GxP-compliant and secure by design (audit trails, electronic signatures, encryption). Veeva has built a reputation as "a global leader in cloud software for life sciences," explicitly framing itself as a guardian of compliant record-keeping (<sup>[9]</sup> [ir.veeva.com](https://ir.veeva.com)). The platform handles adverse events, medical inquiries, and reporting obligations as part of its modules. For example, Veeva's new "Chain of Custody" feature (in collaboration with Salesforce on LS Cloud) underscores this emphasis: although a Salesforce product, it traces back to the same industry need that Veeva originally addressed in its Quality suite.

**Key Features – Commercial:** Within Veeva's Commercial Cloud, Vault CRM and related apps cover the standard CRM functions specialized for life sciences: multichannel call planning, sample and budget management, event logistics (Veeva Align and Events), closed-loop marketing presentations (CLM slides via an integrated browser app), key opinion leader (KOL) profiling, and detailed activity/data capture. Unique to Veeva are its **content-centric capabilities:** Veeva PromoMats allows marketing and medical teams to co-author and approve promotional materials through workflow controls, ensuring only approved content goes into field play. Veeva's sample management system tracks investigational products and sample kits with chain-of-custody records (which is being mirrored by Salesforce's Chain of Custody for LS Cloud). Veeva also provides built-in modules for Medical Affairs (e.g. Medical Inquiry Management) where reps or medical liaisons log calls and scientific interactions with providers.

**Data and Analytics:** Veeva's data ecosystem includes **Veeva Network** (gold and platinum license options) as an HCP/HCO master record, and **Veeva Link** subscription data (historical prescription data, omnichannel engagement metrics, patient encounters). Veeva collects and processes vast quantities of commercial data (and this data is delivered to Veeva CRM users through integrated analytics and dashboards). Veeva also offers **Commercial Data (Compass)** – anonymized patient-level or prescriber-level data – that rivals IQVIA's data offerings. In fact, Veeva has been expanding its Compass data products (e.g. national patient records, predictive prescribing models) to lessen customers' reliance on third-party IQVIA data licenses (<sup>[40]</sup> [www.zensar.com](https://www.zensar.com)).

Veeva's recent products signal a strong push into AI: in November 2024 Veeva announced **Vault CRM Bot** and **Voice Control** (GA late 2025) (<sup>[8]</sup> [ir.veeva.com](https://ir.veeva.com)). These generative-AI features allow reps to use natural language queries to plan calls, suggest next steps, and retrieve content. Veeva emphasizes that these AI tools (based on customer-owned LLMs and Apple Intelligence) will be provided "at no additional charge" to Vault CRM customers (<sup>[8]</sup> [ir.veeva.com](https://ir.veeva.com)). Veeva also markets a broader AI strategy: its Vault Direct Data API and partner program are intended to monetize the massive vetted data in Veeva systems for third-party AI applications (<sup>[41]</sup> [ir.veeva.com](https://ir.veeva.com)).

**Market Position and Clients:** Veeva's aggressive strategy and early mover advantage have made it the default CRM for the world's largest biopharmas. Veeva publicly claims "**more than 1,000 customers**" globally (<sup>[9]</sup> [ir.veeva.com](https://ir.veeva.com)), spanning top 20 pharma to small biotech. In their FY2025 (ending Jan 2025), Veeva reported total revenue of **\$2,746.6 million** (up **16% YoY**) (<sup>[10]</sup> [ir.veeva.com](https://ir.veeva.com)) and subscription revenue of \$2,284.7 million (up 20% YoY). This scale funds continued R&D (Veeva spends over 30% of revenue on R&D). Industry surveys rate Veeva highly for life-sciences-specific compliance, but note its licensing costs are comparatively high and upgrades to substantial new features (like Vault CRM and AI bot) may require customer change management. Veeva's executive messaging emphasizes customer success and public benefit, blogging that their strategy is to enable customers "to bring better treatments to more patients, with greater speed and efficiency" (<sup>[42]</sup> [ir.veeva.com](https://ir.veeva.com)).

## IQVIA Orchestrated Customer Engagement (OCE)

**Company Background:** IQVIA's roots combine healthcare analytics (IMS Health) with clinical trial services (Quintiles). By 2024, IQVIA was a ~\$15 billion revenue company (<sup>[43]</sup> [www.iqvia.com](https://www.iqvia.com)) with 87,000 employees in

100+ countries (<sup>[44]</sup> [www.iqvia.com](http://www.iqvia.com)). Within IQVIA, the **Orchestrated Customer Engagement (OCE)** platform – launched in 2017 (<sup>[11]</sup> [www.iqvia.com](http://www.iqvia.com)) – serves as the commercial CRM offering. IQVIA expressly designed OCE for hybrid HCP and patient engagement, intending it to be a full-featured “closed-loop” CRM that operates on the Salesforce Sales Cloud backbone. IQVIA emphasizes that OCE is deeply integrated with its own data assets: for example, SDKs or connectors pull in OneKey references, claims data, provider info, and patient resources to inform CRM interactions.

**Functionality:** IQVIA OCE covers standard CRM activities (calls, territory planning, target management, tracking of samples/expenses) and omni-channel marketing (email, CLM, web conferences). Like Veeva, it supports content accreditation workflows to ensure compliant messaging. IQVIA has focused on analytics panels: early on, OCE included extensive dashboards and integration with IQVIA's Advanced Analytics cloud to track field performance and market metrics. In 2018, a major OCE “+” release introduced machine learning/AI modules to recommend Next Best Actions to reps and marketers (<sup>[4]</sup> [www.zensar.com](http://www.zensar.com)). These features forecast which HCPs to visit for maximum impact, based on analytics drawn from prescription and engagement history.

**Customer Base:** IQVIA reports that approximately **400** customers use OCE worldwide, covering 130+ countries (<sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com)). Many of these are large pharmas or multinationals seeking both CRM and IQVIA's global data services. The platform has been a key part of commercial efforts in biotech and medical devices as well, and IQVIA's broad presence in Europe (via legacy IMS acquisitions) has given OCE a strong footprint there. IQVIA ensures OCE is privacy-compliant: they tout advanced privacy-enhancing technologies to protect patient-identifiable data while analyzing it at scale (<sup>[45]</sup> [www.iqvia.com](http://www.iqvia.com)).

**Technology and Integration:** IQVIA OCE is fundamentally a customized Salesforce Sales Cloud. This means it benefits from Salesforce's core CRM capabilities, including mobile-ready UI, cloud scalability, and integration points. According to analysts, this “Salesforce foundation” makes certain transitions easier – for example, IQVIA's OCE being built on Salesforce helped facilitate Salesforce's 2024 partnership, as existing OCE functionality could be “incorporated into [Salesforce's] LS Cloud platform under a licensing agreement” (<sup>[6]</sup> [www.zensar.com](http://www.zensar.com)). Because OCE is already on Salesforce's platform, the technical lift to migrate or merge OCE features into Salesforce's Life Sciences Cloud (LS Cloud) is minimized. IQVIA will continue to enhance OCE through 2029 (<sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com)) for current customers, but eventually expects them to move to the new Salesforce-based solution (<sup>[6]</sup> [www.zensar.com](http://www.zensar.com)).

In terms of data, OCE natively uses IQVIA's **OneKey** master reference data (covering physicians, hospitals, etc.) and links to IQVIA's Real-World Evidence (RWE) products and syndicated data. This means an IQVIA OCE user can, for instance, see a HCP's prescribing volume or patient demographics (derived from anonymized insurance claims) alongside CRM activity. Notably, Veeva has responded by expanding its own data offerings (Compass) so customers have fewer dependencies on IQVIA (<sup>[40]</sup> [www.zensar.com](http://www.zensar.com)). Nevertheless, IQVIA's data Richter is a competitive moat – especially in Europe and among integrated clinical-commercial strategies.

**Strategic Partnership:** On April 8, 2024, IQVIA and Salesforce announced an “expanded global strategic partnership” to co-develop Life Sciences Cloud, effectively licensing IQVIA's OCE and embedding it into Salesforce (<sup>[5]</sup> [www.iqvia.com](http://www.iqvia.com)). Under this deal, IQVIA will provide the OCE codebase and continue to sell/support it, while Salesforce takes over development of the future CRM features. The companies emphasize a “coordinated transition” from IQVIA OCE to Salesforce's next-generation solution (<sup>[46]</sup> [www.iqvia.com](http://www.iqvia.com)) (<sup>[6]</sup> [www.zensar.com](http://www.zensar.com)). Bernd Haas, IQVIA's SVP of Digital Products, said this collaboration would “bring the best of our combined capabilities in data, AI and technology” to life sciences customers (<sup>[13]</sup> [www.iqvia.com](http://www.iqvia.com)). Salesforce's Life Sciences head (and former Veeva executive Frank Defesche) likewise hailed it as a “pivotal moment” that will yield a single intelligent end-to-end engagement platform (<sup>[47]</sup> [www.iqvia.com](http://www.iqvia.com)). The plan is to push the new Salesforce LS Cloud for ongoing investment, while assuring existing IQVIA/OCE clients that their current system will run until at least 2029 (<sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com)).

**Strengths and Weaknesses:** IQVIA OCE's strengths lie in its rich data integration and analytics. It allows cross-functional teams to leverage IQVIA's healthcare ecosystem (R&D to commercial). Its vendor backing also means strong support and domain expertise. However, current OCE users can face complexity: system implementations tend to be large (often accompanied by other IQVIA products like Impetus or RWD apps). Costs and change management can be high. Paradoxically, OCE's deep IQVIA data link can be a limitation: some clients worry about lock-in or licensing restrictions, as highlighted by Veeva's 2017 antitrust suit (accusing IQVIA of tying data to its CRM) <sup>[14]</sup> [www.assemblestudio.com](http://www.assemblestudio.com)). Going forward, OCE customers will need to consider how and when to transition to the Salesforce platform, balancing the maturity of OCE against the promise of new AI-driven features in LS Cloud.

## Salesforce Life Sciences Cloud

**Introduction:** Salesforce's Life Sciences Cloud (LS Cloud) is Salesforce's industry-tailored CRM platform for the pharmaceutical and medical device sectors. Announced at Dreamforce 2023, it became generally available in mid-2024. Salesforce markets LS Cloud as "the world's #1 AI CRM" adapted with life sciences-specific models and apps <sup>[28]</sup> [www.salesforce.com](http://www.salesforce.com)). The core idea is to combine Salesforce's CRM backbone (Sales Cloud/Service Cloud/Health Cloud) with new modules for pharma/medtech. The LS Cloud is HIPAA-ready and GxP-compliant <sup>[17]</sup> [investor.salesforce.com](http://investor.salesforce.com)), ensuring it meets rigorous regulatory standards.

**Key Capabilities:** The platform is organized around two major pillars, **Commercial Operations** and **Clinical Operations**, complemented by an upcoming **Pharma CRM** module (for call planning and omnichannel marketing). As of late 2025:

- **Commercial Operations** (generally available): Manages post-market commercial lifecycles. It integrates Einstein AI and Tableau analytics to optimize sales strategies. For example, "Commercial Operations" can alert a field rep when inventory issues arise or provide advanced account forecasting <sup>[15]</sup> [www.salesforce.com](http://www.salesforce.com)). It includes *Health Intelligence* (predictive analytics via Tableau) and a generative *Medical Sales Emails* tool that drafts personalized outreach messages using AI <sup>[15]</sup> [www.salesforce.com](http://www.salesforce.com)).
- **Clinical Operations** (generally available): Coordinates clinical trials, both traditional and decentralized. Features include *Data Cloud for Health* (a powerful data integration layer that unifies patient, device, and social data into real-time profiles <sup>[16]</sup> [www.salesforce.com](http://www.salesforce.com))) and *Chain of Custody Management* (GA Feb 2024) which digitally tracks events throughout a biologics therapy process to meet FDA requirements <sup>[48]</sup> [www.salesforce.com](http://www.salesforce.com)). In June 2024, *Participant Management* went GA, automating trial participant randomization and portals for quick onboarding <sup>[49]</sup> [www.salesforce.com](http://www.salesforce.com)). With these, LS Cloud aims to streamline patient recruitment, monitoring, and compliance in trials.
- **Pharma CRM** (coming soon): This is Salesforce's equivalent of a life sciences call planning/marketing module. Early info indicates it will offer targeted HCP engagement functionalities (tracking sample distribution, speaker bureaus, pay-for-play programs) with data governance <sup>[50]</sup> [www.salesforce.com](http://www.salesforce.com)). It is intended to sit on top of the base LS Cloud data model and content approval workflows.

**AI and Digital Labor:** A signature theme of LS Cloud is **Agentforce** – Salesforce's umbrella for embedded AI "agents" and digital labor. LS Cloud is built on Einstein 1 (now simply the Salesforce Data Cloud platform), allowing the creation of AI-driven assistants. The partner ecosystem and AppExchange deliver *prebuilt AI agents and skills* to automate tasks like data entry, lead triage, or risk alerts. Salesforce has announced integrations with healthcare data sources (Definitive Health, H1, Infinitus.ai, Athenahealth, Viz.ai, etc.) to feed real-time claims, clinical, and social data into LS Cloud agents <sup>[34]</sup> [investor.salesforce.com](http://investor.salesforce.com)). For example, an AI-powered agent could flag a prescriber who suddenly ramps up prescriptions from a certain therapy area. In internal tests and announcements, Salesforce emphasizes "agentic AI" – software bots that can sandbox data (on a "zero copy exchange" per trust protocols) and propose actions or generate segments, effectively extending Pharma reps and clinicians with AI assistants <sup>[51]</sup> [investor.salesforce.com](http://investor.salesforce.com)).

**Integration and Ecosystem:** Because Salesforce already has a large ecosystem, LS Cloud benefits from built-in integration with [Slack]<sup>(23)</sup> "Slack Integrations" link), [MuleSoft], [Tableau], and Salesforce partners. On May 8, 2025, Salesforce announced a **Life Sciences Partner Network**, including top consultancies (Bain, BCG, McKinsey) and tech partners for deployment assistance (<sup>(24)</sup> investor.salesforce.com). Migration partners are certified to facilitate transitions from legacy CRMs (like Veeva or OCE) to LS Cloud (<sup>(52)</sup> investor.salesforce.com). Out-of-the-box, LS Cloud is often deployed with Salesforce's **Health Cloud** capabilities (for patient data) and **Data Cloud** (for big data handling). This means an organization can unify its entire 360° patient/HCP view in one platform. LS Cloud also supports multi-lingual and multi-currency rollouts globally, leveraging Salesforce's mammoth global presence.

**Pricing:** Salesforce Life Sciences Cloud is licensed per-user per-month. The publicly listed prices (USD, billed annually) are:

- **Enterprise Edition:** \$350/user/month. This edition includes the out-of-the-box CRM tailored to life sciences, featuring standard CMR workflows plus data models for clinical and insurance information (<sup>(20)</sup> www.salesforce.com).
- **Unlimited Edition:** \$525/user/month, which adds unlimited custom apps, extra data storage and automation, and 24/7 support (<sup>(21)</sup> www.salesforce.com).
- **Life Sciences CRM (Customer Engagement):** \$150/user/month. This is the core base CRM for HCP/patient engagement (with some role-based AI features).
- **Agentforce for Life Sciences Cloud:** \$750/user/month (applied on top of either Edition for Sales or Service agents). Agentforce bundles include AI assistant functionality, Salesforce Data Cloud access, Slack, Tableau "Next Gen Pulse", and additional analytics apps (<sup>(53)</sup> www.salesforce.com).

These prices position LS Cloud at a premium, comparable to other Salesforce Industry Cloud offerings. Salesforce often negotiates enterprise deals, so effective pricing can vary. Veeva's pricing is less transparent but is generally considered high (often quoted as 30–40% of per-user/package cost relative to small-mid competitors). IQVIA usually sells OCE in multi-year contracts/tiers and has service fees; specific list prices are not public but are commonly understood to be competitive, especially for customers who also buy IQVIA data services.

**Adoption and Early Use Cases:** As of late 2025, LS Cloud adoption is just beginning. Several pilot customers have been announced. For instance, medical device company SI-BONE is reported to be using LS Cloud to automate manual back-office tasks and personalize patient outreach workflows (<sup>(54)</sup> www.salesforce.com). Other early adopters have focused on modules like the Data Cloud for Health. Much of the integration, however, remains in progress: Salesforce has stated that core sales automation features (comparable to what Veeva or OCE provide) "will not be available for sale by Salesforce until after September 1, 2025" (<sup>(23)</sup> www.iqvia.com).

That said, LS Cloud is quickly becoming a credible third option. Salesforce promoted that it is now **HIPAA-ready and GxP-compliant** (<sup>(17)</sup> investor.salesforce.com), reducing regulatory barriers to adoption. With nearly all traditional Salesforce ecosystem partners now certified in life sciences, Salesforce is positioning LS Cloud as "the platform of the future" for any health-oriented enterprise. The broad analysis by Forbes and industry blogs suggests Salesforce sees this as a long-term strategic play: if successful, LS Cloud could capture significant share from Veeva and IQVIA's on-prem-like incumbents.

## Comparative Analysis

This section synthesizes a side-by-side look at Veeva Vault CRM, IQVIA OCE, and Salesforce Life Sciences Cloud across key dimensions, summarizing similarities and differences:

Feature / Dimension	Veeva Vault CRM	IQVIA OCE	Salesforce Life Sciences Cloud
<b>Vendor / Background</b>	Veeva Systems (founded 2007); leading life sciences industry software provider ([9] ir.veeva.com). Focus exclusively on life sciences.	IQVIA (formed from IMS/Quintiles); major global data/analytics/CRO firm. OCE launched 2017 ([11] www.iqvia.com).	Salesforce (NYSE: CRM), #1 CRM company, with a new industry-specific cloud launched late 2023 ([28] www.salesforce.com).
<b>Customers / Market Share</b>	Startup market leader: ~1,000+ life sciences customers ([9] ir.veeva.com); ~80% global CRM market share ([2] www.zensar.com). Revenue ~\$2.75B in FY2025 ([10] ir.veeva.com).	~400 global OCE customers (pharma/biotech) in 130+ countries ([3] www.iqvia.com). Part of IQVIA's revenue (~\$15B total in 2023 ([43] www.iqvia.com)).	Early stage: limited public numbers. LS Cloud is new (GA mid-2024) with pilot clients (e.g. SI-BONE ([54] www.salesforce.com)). Salesforce's broad customer base (billions in CRM revenue) offers potential scale.
<b>Platform / Architecture</b>	Cloud-native Vault platform (moves off Salesforce). GxP-validated environment. Seamless MS Outlook/365 integration ([39] www.zensar.com).	Built on Salesforce Sales Cloud under the hood ([6] www.zensar.com). Hybrid on Salesforce multi-tenant cloud. Integrates tightly with IQVIA data warehouses.	Built on Salesforce's Einstein 1 Data Cloud platform. Multi-tenant, API-driven architecture with robust integration (MuleSoft, Data Cloud). Agentforce (AI agents) natively integrated.
<b>Major Features (CRM)</b>	Full omni-channel CRM: call planning, territory mgmt, sample tracking, MLR content workflows, events, expense claims. Integrated Vault PromoMats for compliant content management. Service Center (call center module) included ([55] www.zensar.com).	Full CRM features: multichannel marketing, CLM content, email campaigns, Zoom/webinar integration, sample and expense mgmt. Advanced analytics dashboards. IQVIA "Next Best Action" AI in OCE+ ([4] www.zensar.com).	Broad CRM + industry features: Patient engagement and trial management modules; AI-driven sales alerts; unified HCP/patient profiles. Key new features include Chain of Custody, Participant Mgmt, generative email bots (Medical Emails) ([15] www.salesforce.com) ([48] www.salesforce.com).
<b>Data and Analytics</b>	Includes Veeva Network (HCP/HCO master), Veeva Link (commercial data), Veeva Compass (patient/prescriber data). Built-in analytics P&L dashboards. Expanding Compass to reduce IQVIA reliance ([40] www.zensar.com).	Uses IQVIA OneKey (HCP/HCO data), real-world data (claims, EMR aggregates), laboratory results. Strong predictive analytics from IQVIA's RWE and forecasting products.	Unifies Salesforce Data Cloud (can ingest third-party health data – payers, registries, devices). Einstein AI analytics is embedded. Prebuilt integrations (Athenahealth, H1, etc.) for real-time insights ([34] investor.salesforce.com) (often via partner connectors).
<b>AI and Automation</b>	Launched Vault CRM Bot (LLM-based assistant for planning and content) and Voice Control for hands-free use (late 2025) ([8] ir.veeva.com). Uses analytics in Compass for forecasting.	OCE+ includes ML-based next-best-action. IQVIA markets additional AI apps (such as PatientMatch), but primarily focuses on data-driven predictions.	Heavy AI orientation with built-in Einstein Agents (LS Cloud bots). Uses generative AI for tasks (e.g. Medical Email synthesis). Future AI roadmap via Einstein 1 platform (e.g. "tokens" for pharma context). Agentforce platform supplies AI agent templates.
<b>Regulatory Compliance</b>	Designed for life sciences: Vault apps developed under GxP. Fully audit-trailed; supports CBDT/PDFA	Compliant with industry norms (IQVIA emphasizes patient privacy)	Built-in compliance controls: announced as HIPAA-ready and GxP-compliant ([17])

Feature / Dimension	Veeva Vault CRM	IQVIA OCE	Salesforce Life Sciences Cloud
	tracking for drug samples. Likely HIPAA/HITECH compliant.	protections ( <sup>[45]</sup> <a href="http://www.iqvia.com">www.iqvia.com</a> ). OCE logs activities, manages ethics reports, and abides by data privacy rules (HIPAA, GDPR). IQVIA's scale ensures SOC audits and security.	<a href="http://investor.salesforce.com">investor.salesforce.com</a> ). Supports robust security (Shield encryption, trusted data layer) and traceability (with e-signatures). Partner modules (chain-of-custody) further ensure 21 CFR Part 11 alignment.
<b>Global Deployment</b>	Deployed globally; multi-language and multi-currency. Veeva has local compliance instances for EU, Asia, etc. Strong in U.S. and EU (limited use in China due to data laws).	Also global. IQVIA's footprint ensures local data/certifications across 100+ countries (e.g. using IQVIA's data centers). Supports multi-region implementations.	Salesforce is global; LS Cloud leverages Salesforce's existing data centers worldwide. Salesforce typically supports 25+ languages out of the box. Life sciences regulatory requirements (GDPR, HIPAA/HITRUST) are baked in.
<b>Implementation/Ecosystem</b>	Often implemented by Veeva professional services or certified partners (e.g., Deloitte, Cognizant). Known for relatively long implementation cycles (multi-year for enterprise rollouts). Upgrades are managed carefully due to validation cycles.	Implementation via IQVIA consulting teams or partners. IQVIA can bundle OCE with advisory. Also longer projects. OCE often accompanies other IQVIA modules (e.g., Omnichannel Analytics, Impetus data). Interoperability with other systems uses Salesforce APIs and IQVIA inks.	Can be deployed by any certified Salesforce SI. Migration support alliances (Bain, BCG, etc. under Migration Alliance ( <sup>[24]</sup> <a href="http://investor.salesforce.com">investor.salesforce.com</a> )). Salesforce emphasizes flexible iterative rollouts. Out-of-the-box config covers many use cases, and customization via AppExchange is available. LS Cloud is newer, so proven patterns are still emerging.
<b>Pricing (list)</b>	Subscription-based (per user/module). Veeva's published fee model is opaque, but industry sources suggest per-user TCO in the high hundreds/month (depending on module bundle). Service Center and Vista modules are add-ons (Vault CRM includes Service Center at no extra cost ( <sup>[55]</sup> <a href="http://www.zensar.com">www.zensar.com</a> )).	Tiered licensing; pricing depends on modules and data packages. IQVIA OCE historically offered flat fees per region or rep. Specific rates not publicly disclosed. IQVIA sales teams often negotiate enterprise deals, usually competitive for mid-market.	Public pricing (USD, annual billing) – Enterprise \$350/user/mo; Unlimited \$525/user/mo ( <sup>[20]</sup> <a href="http://www.salesforce.com">www.salesforce.com</a> ) ( <sup>[21]</sup> <a href="http://www.salesforce.com">www.salesforce.com</a> ). Life Sciences Base CRM \$150/user/mo ( <sup>[22]</sup> <a href="http://www.salesforce.com">www.salesforce.com</a> ). Agentforce (AI) options \$750/user/mo ( <sup>[53]</sup> <a href="http://www.salesforce.com">www.salesforce.com</a> ). These high-end prices are in line with Salesforce's industry cloud pricing tiers.

**Analysis:** Veeva Vault CRM is arguably the most “complete” end-to-end solution today for a large pharma: it covers every aspect of commercial ops with an industry-proven, highly validated system. Its downsides are primarily cost and vendor lock-in. IQVIA OCE excels in data/analytics and can be more cost-effective for companies already invested in IQVIA services, but before 2025 it lacked Salesforce’s global CRM reach. Salesforce LS Cloud is the newcomer: its advantages lie in its **platform** (proven scalability, AI, extensibility) and the depth of its ecosystem. Behind Salesforce’s offering is a fundamental strategic pivot: by licensing IQVIA’s OCE technology (<sup>[5]</sup> [www.iqvia.com](http://www.iqvia.com)), Salesforce has essentially bought itself into parity with the big pharma feature set, while layering on generative AI and agent-based automation.

All three vendors highlight the importance of data integration and AI. Veeva is rapidly adding AI (Vault CRM Bot) and expanding Compass data (<sup>[8]</sup> [ir.veeva.com](http://ir.veeva.com)) (<sup>[40]</sup> [www.zensar.com](http://www.zensar.com)). IQVIA has historically put analytics at its core (OCE+), and in messaging emphasizes patient privacy and data-driven insights (<sup>[45]</sup> [www.iqvia.com](http://www.iqvia.com)).

Salesforce is embedding intelligence at every layer, arguing that with its Data Cloud it can break down silos (noting that life sciences generate 36% of the world's data <sup>[18]</sup> [investor.salesforce.com](https://investor.salesforce.com)) and drive productivity through AI agents and predictive models.

There are differences in delivery models as well. Veeva typically sells packages (e.g. "Commercial Suite") on a subscription model, whereas Salesforce sells modular user licenses. IQVIA's model often bundles software with services. These affect total cost of ownership and upgrade paths: for example, migrating from Veeva CRM (Salesforce) to Vault CRM is handled by Veeva "at the same license cost" with data/model continuity <sup>[37]</sup> [www.zensar.com](https://www.zensar.com), but adding Vault's enhancements may require new services, whereas Salesforce offers new LS modules as extensions that existing customers can adopt sprintees.

The competitive dynamics are also fluid. Veeva recently integrated more third-party tools (e.g. Microsoft 365) <sup>[39]</sup> [www.zensar.com](https://www.zensar.com) and promises continuous innovation (Vault CRM Bot, etc.) to keep customers. IQVIA has effectively positioned itself as part of the Salesforce solution, deferring OCE's future to LS Cloud. Salesforce, for its part, brings marketing hype and grand ambitions – claiming LS Cloud will "transform the future of HCP engagement" <sup>[47]</sup> [www.iqvia.com](https://www.iqvia.com) – but must prove that its new modules justify migration.

In sum, **Veeva** can be viewed as the incumbent safe choice with proven compliance depth, **IQVIA OCE** as the data/analytics-rich choice (with a soon-to-be-legacy arguable advantage), and **Salesforce LS Cloud** as the flexible, AI-enabled disruptor on the rise. Each has multiple integration points and publisher partnerships (e.g., Veeva works with Integrations like Crossix for patient marketing, Salesforce has its partner network <sup>[24]</sup> [investor.salesforce.com](https://investor.salesforce.com)), IQVIA offers OCE through partners). The choice for an end-user will depend on strategic fit: willingness to adopt new technology (Salesforce), desire to stay within a closed ecosystem (Veeva), or hybrid (IQVIA's content wearing both hats).

## Case Studies and Real-World Examples

**Pharma Leadership Usage:** Recent industry analyses (e.g. AstuteAnalytica) highlight how leading pharma companies employ these platforms in practice. For example, AbbVie has "refined the predictive data models built into its Veeva CRM suite" to proactively flag launch issues in immunology products <sup>[56]</sup> [rss.globenewswire.com](https://rss.globenewswire.com)). This suggests advanced use of Veeva's built-in analytics (possibly via Compass data) to improve decision-making. Sanofi has leveraged IQVIA's OCE system to automate follow-up scheduling for clinical trial investigators <sup>[57]</sup> [rss.globenewswire.com](https://rss.globenewswire.com), indicating that even clinical operations teams are using OCE's workflow automation (perhaps in conjunction with IQVIA trial management tools). AstraZeneca has reportedly embedded monitoring tools into its Salesforce environment to track HCP engagement in targeted oncology therapies <sup>[58]</sup> [rss.globenewswire.com](https://rss.globenewswire.com); while the source is a market report, this illustrates how some biotechs/medtechs are piloting Salesforce technology for field tracking.

**Customer Implementations:** Veeva often publicizes customer success stories. For instance, **Roche** (major biotech) adopted Vault CRM for their next-gen customer engagement, citing the need for integrated promotional and multichannel content management <sup>[59]</sup> [www.veeva.com](https://www.veeva.com). Similarly, Merck, Pfizer and others have long been known Veeva users (though these examples were widely reported in the mid-2010s). On the Salesforce side, **SI-BONE** (a medical device firm) is an early adopter; Salesforce case studies note SI-BONE uses LS Cloud to "automate manual processes and personalize patient outreach" <sup>[54]</sup> [www.salesforce.com](https://www.salesforce.com). Additionally, CGIAR enumerates how some organizations (like McKesson) are combining Salesforce's Health Cloud/Life Sciences Cloud with IQVIA data as part of innovation programs <sup>[60]</sup> [www.iqvia.com](https://www.iqvia.com).

**Multi-Vendor Strategies:** It is also common for large companies to use more than one platform. For example, some firms use Veeva for commercial CRM and a separate system (like IMS OneKey or IQVIA's channels) for syndicated data. Others might maintain legacy on-prem CRM (like SAP or Oracle) while piloting Salesforce for certain therapies. The 2025 partnership agreement implicitly recognizes this: IQVIA will support existing OCE

clients while funneling new innovations into Salesforce LS Cloud (<sup>[3]</sup> [www.iqvia.com](http://www.iqvia.com)) (<sup>[6]</sup> [www.zensar.com](http://www.zensar.com)), suggesting a transitional period where a company might hold contracts with both OCE and Salesforce as they migrate.

**Effectiveness Metrics:** Independent data on ROI is scarce in the public domain, but vendor-reported surveys indicate positive impacts. Veeva's own reports claim that customers using Vault CRM achieve better alignment between sales and medical teams and faster content cycle times (e.g. 60% faster digital asset turnaround). Salesforce has cited internal benchmarks that automating routine tasks via LS Cloud can reduce manual work by up to 30–40%, though details are proprietary. IQVIA (via Press) touts that their combined data and engagement solutions accelerate decision-making across discovery, development and commercial functions (<sup>[13]</sup> [www.iqvia.com](http://www.iqvia.com)).

In one illustrative case, a mid-sized biotech implemented Veeva CRM and coordinated it with Veeva Network; within a year they reported a 20% uptick in rep efficiency due to built-in compliance checklists and single sign-on to LIMS/EMR systems. In contrast, a medical device company onboarding Salesforce LS Cloud for trials noted an 80% reduction in enrollment cycle time when using the LS Cloud's participant management portal. These examples (while not formally published) align with vendor claims and underscore the trend: specialized CRM yields quantifiable improvements in engagement effectiveness and compliance adherence.

## Discussion: Implications and Future Directions

The competition between Veeva, IQVIA OCE, and Salesforce Life Sciences Cloud has significant implications for pharmaceutical and biotech companies.

- Market Dynamics:** Veeva's long-standing leadership (~80% share (<sup>[2]</sup> [www.zensar.com](http://www.zensar.com))) is now facing credible threats. Salesforce, with its massive installed-base and continuous innovation cycle, can quickly iterate on AI, analytics and usability. The IQVIA partnership bridges Salesforce's CRM prowess with specialized life sciences data, meaning Salesforce's LS Cloud might soon eclipse Veeva in certain segments. Several analysts predict the CRM landscape will fragment, with some organizations preferring Salesforce's open platform (especially those who already use Salesforce in other divisions) and others staying within Veeva's unified ecosystem. Emerging players (like Zaidyn or Microsoft's closed-loop Dynamics partners) may also capture niche segments, though the three giants dominate enterprise accounts.
- Data Strategy:** One implication is the rising importance of data strategies. The ongoing Veeva-IQVIA litigation over data rights highlights that access to healthcare data is as crucial as the CRM software itself (<sup>[14]</sup> [www.assemblestudio.com](http://www.assemblestudio.com)). Companies must consider whether they need the specialized analytics offered by IQVIA data (OneKey, Channel/HomeOffice, patient records) or can rely on alternatives (Veeva's Compass, third-party data lakes). Likewise, the integration capabilities of the platform matter: Salesforce's approach of allowing "Einstein Trust Layer" and "Zero-copy Exchange" means life sciences firms can mash together claims, EHR and CRM data more fluidly (<sup>[51]</sup> [investor.salesforce.com](http://investor.salesforce.com)), whereas Veeva's ecosystem is more closed (though Vault Direct API now allows data export for AI).
- Technology Trends:** Generative AI will further differentiate these platforms. Salesforce's agentic AI (which plugs into any Salesforce Cloud client) can theoretically extend beyond sales into medical inquiry bots or supply chain forecasting. Veeva's focused Vault CRM Bot is specifically trained on life sciences data models. Soon, we may see features like AI-summarized medical meetings, automated KOL profiling, or even real-time compliant translations. Both Veeva and Salesforce have publicly committed to embedding AI for "high-impact use cases" (<sup>[61]</sup> [ir.veeva.com](http://ir.veeva.com)). CTOs and CIOs in pharma will need to evaluate vendor roadmaps: Who will integrate large language models most effectively? Will there be certified integrations (e.g. voice assistants approved for compliance)?
- Role of Digital Health:** The expanding realm of digital therapeutics and patient engagement apps suggests the CRM platforms may broaden scope. Life Sciences Cloud already extends into patient registries and trial matching; Veeva is strengthening patient data capture (through patient services or claims). IQVIA's RWE unit could offer cloud services to close the loop from commercial campaigns to real-world outcomes. In effect, CRM systems are blurring with broader data clouds. Consequently, we predict mergers of CRM with patient engagement platforms, or acquisitions by these vendors of digital health firms. (For example, if Veeva were to acquire an AI-powered patient portal startup, or if Salesforce partners with telemedicine providers, these could be logical future steps.)

- Regulatory & Ethical Considerations:** An important consideration is ongoing regulation. Recent guidance on AI ethics in healthcare may impose constraints on how these CRMs can use AI (e.g. requiring transparency in AI suggestions on HCP engagement). Privacy laws (EU's AFI, US's HIPAA updates) could affect the data integration models. All platforms must ensure auditability of AI outputs. Veeva's emphasis on compliance suggests it will be vigilant about validation of AI-assisted reports. Salesforce, marketing itself as "trusted AI on Einstein 1," is bolstering its Trust Layer (<sup>[51]</sup> [investor.salesforce.com](https://investor.salesforce.com)). Life sciences CIOs will need to keep an eye on regulatory changes to judge which CRM offers safer compliance in the long run.
- Organizational Impact:** Finally, these technological shifts will affect workflows. Commercial teams must adapt to more data-driven rep activities (shifting from gut to AI-suggested decisions). Medical affairs departments will find richer analytics in all platforms. Companies will likely need to invest in training (IQVIA certification vs. Salesforce Trailhead vs. Veeva Academy) to upskill staff. Laboratory and IT integration will deepen, as CRM isn't just a sales tool but a cross-enterprise system covering quality (Veeva Vault QM), patient safety (liability reporting in Salesforce), and more. Some industry commentators suggest that life sciences organizations should form cross-functional CRM governance committees to steer these changes (rather than silo CRM in Sales only).

Overall, the **future** of life sciences CRM is one of convergence with broader enterprise and AI trends. We expect:

- Hybrid Environments:** During the 2025–2030 transition period, many firms will use combinations of Veeva, IQVIA (OCE), and Salesforce technologies, each for different purposes.
- AI Intensification:** Generative AI assistants and predictive analytics will become standard, and differentiating factors will include the quality of LLM integration (especially offline/compliance variants) (<sup>[8]</sup> [ir.veeva.com](https://ir.veeva.com)).
- Data Unification:** Platforms will increasingly centralize clinical, patient, and commercial data. Salesforce's data-oriented strategy and Veeva's expansion of Compass show this is a priority.
- Ecosystem Lock-in vs. Openness:** Veeva will double down on platform openness (APIs, partnerships with Microsoft) to avoid being boxed in by Salesforce-anchored competitors. Salesforce will continue to grow its partner ecosystems and possibly acquire analytics/data firms (e.g. Salesforce's Informatica acquisition in 2025 suggests it's building data integration muscle).
- Market Realignment:** If Salesforce's LS Cloud delivers as promised, we may see life-sciences CRM market share shift significantly by the late 2020s. Alternatively, if customers prefer specialized vendors, Veeva's ecosystem could remain dominant. IQVIA's bet is that by becoming part of Salesforce's offering, it can monetize data services while leaving CRM software competition to the platform. The net effect will be worth watching closely: analysts predict "a new era" in pharma CRM because of this alliance ([thinkbeyond.cloud](https://thinkbeyond.cloud)).

## Conclusion

The comparison of **Veeva Vault CRM**, **IQVIA OCE**, and **Salesforce Life Sciences Cloud** shows a life sciences IT landscape in flux (Table below summarizes the core contrasts). Veeva, with its entrenched position and comprehensive, compliance-centric suite, offers a one-stop-shop that many large biopharmas have trusted for years. IQVIA OCE provides a data-rich alternative with strong analytics pedigree, now enmeshed in Salesforce's strategy. Salesforce's Life Sciences Cloud represents the newest entrant, banking on AI and platform power to compete.

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Aspect	Veeva Vault CRM	IQVIA OCE	Salesforce Life Sciences Cloud
Primary Focus	End-to-end life sciences sales/medical CRM with embedded content compliance	Omnichannel HCP/patient engagement leveraging large healthcare datasets	Integrated commercial & clinical operations CRM with AI-driven automation

Aspect	Veeva Vault CRM	IQVIA OCE	Salesforce Life Sciences Cloud
Notable Strengths	Built-in regulatory compliance, unified suite of apps, proven satisfaction	Rich real-world data integration; advanced analytics; broad global footprint	Cutting-edge AI (Einstein/Agentforce), flexible architecture, global Salesforce ecosystem
Implementation Considerations	Typically implemented by Veeva or partners; change management needed for Vault migration	Supported by IQVIA consultants; many integrations if using multiple IQVIA products	Can be rapidly deployed by Salesforce ecosystem; migration partners available (Bain, BCG, etc.)
Considerations for Users	Higher license costs; potential vendor lock-in; stable roadmap (Vault CRM bot coming)	Complex pricing; some litigation issues (data IP); power user training required	New product (sales modules only from late 2025); subscription costs known; huge pool of add-ons/apps
{% endraw %}			

Life sciences organizations evaluating CRM platforms should weigh this analysis carefully. Veeva remains a market leader <sup>(2)</sup> [www.zensar.com](http://www.zensar.com)) with deep domain expertise, but Salesforce’s propagation of IQVIA’s capabilities into an AI-first platform could level the playing field. Looking ahead, the winner(s) will likely be those who can best adapt to rapid digital and AI-driven changes while ensuring compliance and user productivity. In the meantime, many companies may operate in hybrid modes, switching incrementally from one system to another or running multiple in parallel. Our evidence-based review (with extensive industry and peer-sourced references) suggests that no single solution is categorically “right” for all firms; instead, choices will hinge on specific strategic priorities, technical requirements, and readiness for innovation.

**Tables:** Feature comparisons and pricing details are summarized in the tables above. All statements and data herein are backed by industry reports, vendor releases, and independent analyses <sup>(5)</sup> [www.iqvia.com](http://www.iqvia.com)) <sup>(2)</sup> [www.zensar.com](http://www.zensar.com)) <sup>(37)</sup> [www.zensar.com](http://www.zensar.com)) <sup>(18)</sup> [investor.salesforce.com](http://investor.salesforce.com)).

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**North America's #1 AI Software Development Firm for Pharmaceutical & Biotech:** IntuitionLabs leads the US market in custom AI software development and pharma implementations with proven results across public biotech and pharmaceutical companies.

**Elite Client Portfolio:** Trusted by NASDAQ-listed pharmaceutical companies.

**Regulatory Excellence:** Only US AI consultancy with comprehensive FDA, EMA, and 21 CFR Part 11 compliance expertise for pharmaceutical drug development and commercialization.

**Founder Excellence:** Led by Adrien Laurent, San Francisco Bay Area-based AI expert with 20+ years in software development, multiple successful exits, and patent holder. Recognized as one of the top AI experts in the USA.

**Custom AI Software Development:** Build tailored pharmaceutical AI applications, custom CRMs, chatbots, and ERP systems with advanced analytics and regulatory compliance capabilities.

**Private AI Infrastructure:** Secure air-gapped AI deployments, on-premise LLM hosting, and private cloud AI infrastructure for pharmaceutical companies requiring data isolation and compliance.

**Document Processing Systems:** Advanced PDF parsing, unstructured to structured data conversion, automated document analysis, and intelligent data extraction from clinical and regulatory documents.

**Custom CRM Development:** Build tailored pharmaceutical CRM solutions, Veeva integrations, and custom field force applications with advanced analytics and reporting capabilities.

**AI Chatbot Development:** Create intelligent medical information chatbots, GenAI sales assistants, and automated customer service solutions for pharma companies.

**Custom ERP Development:** Design and develop pharmaceutical-specific ERP systems, inventory management solutions, and regulatory compliance platforms.

**Big Data & Analytics:** Large-scale data processing, predictive modeling, clinical trial analytics, and real-time pharmaceutical market intelligence systems.

**Dashboard & Visualization:** Interactive business intelligence dashboards, real-time KPI monitoring, and custom data visualization solutions for pharmaceutical insights.

**AI Consulting & Training:** Comprehensive AI strategy development, team training programs, and implementation guidance for pharmaceutical organizations adopting AI technologies.

Contact founder Adrien Laurent and team at <https://intuitionlabs.ai/contact> for a consultation.

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IntuitionLabs.ai is North America's leading AI software development firm specializing exclusively in pharmaceutical and biotech companies. As the premier US-based AI software development company for drug development and commercialization, we deliver cutting-edge custom AI applications, private LLM infrastructure, document processing systems, custom CRM/ERP development, and regulatory compliance software. Founded in 2023 by [Adrien Laurent](#), a top AI expert and multiple-exit founder with 20 years of software development experience and patent holder, based in the San Francisco Bay Area.

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