



Improving Life. Empowering Customers.

The Future of CRM in Life Sciences

Agenda

- 01** What's Driving CRM Change
- 02** Key Evaluation Factors
- 03** Balancing Innovation with Control
- 04** Avoiding Common Pitfalls
- 05** Real-World Lessons
- 06** Q&A

Why This Conversation Matters Now



- ✓ **From Call Logging to Intelligent Engagement:** CRM is shifting from transactional activity tracking to enabling real-time, AI-driven engagement and personalization.
- ✓ **Hybrid Field Engagement:** Sales and Medical teams now operate in hybrid environments, balancing in-person and virtual HCP interactions.
- ✓ **AI Raises the Bar:** Stakeholders expect predictive insights, not just reports – placing pressure on CRM systems to deliver integrated, intelligent data.
- ✓ **Compliance Is Still Critical:** Data privacy, audit trails, and regulatory adherence are non-negotiable even in a digital-first CRM model.
- ✓ **Investment Must Show ROI:** Leadership expects measurable business outcomes from CRM modernization, not just better interfaces.

Market Forces Shaping CRM Evolution



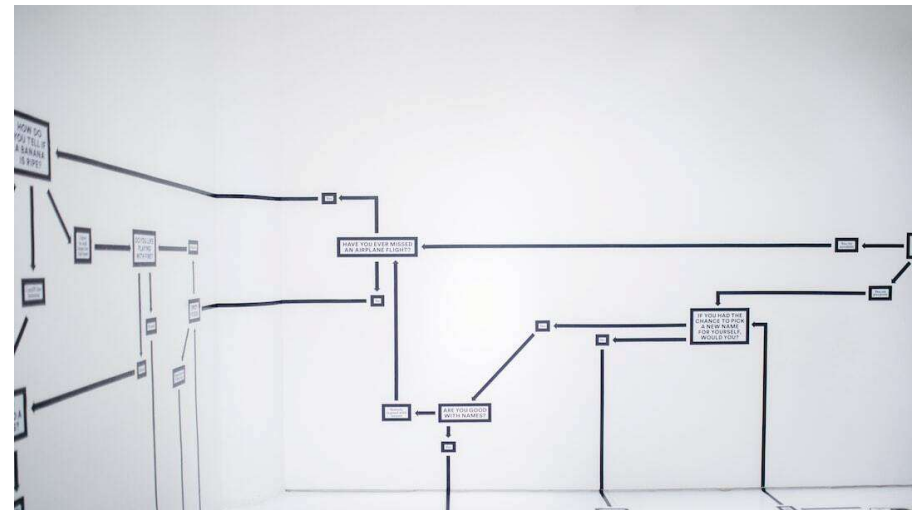
- ✓ **AI-Driven Personalization:** CRM systems now leverage AI for next-best-action, call planning, and engagement recommendations tailored to individual HCPs.
- ✓ **Hybrid Field Engagement:** Post-pandemic, field models have shifted to include virtual and in-person touchpoints, requiring flexible CRM architectures.
- ✓ **Cross-Functional Integration:** CRM must unify data and processes across Sales, Marketing, and Medical to enable omnichannel consistency
- ✓ **Data Compliance & Quality:** Systems must ensure GxP compliance, auditability, and consistent data governance across regions and platforms.
- ✓ **Alignment:** Coordination of HCP engagement with Commercial, Medical, and Access field



The Role of AI and Data in Modern CRM



- ✓ **Smarter Call Planning:** AI enables reps to optimize call frequency, channels, and messaging based on behavioral and segmentation data.
- ✓ **Data Governance Gaps:** AI effectiveness is limited by poor data hygiene, disconnected systems, and lack of standardization.
- ✓ **Insights from Integrated Data:** Predictive recommendations rely on unified, compliant pipelines that feed real-time engagement tools.
- ✓ **CRM as a Data Hub:** A modern CRM must serve as the orchestrator across data sources, ensuring quality, timeliness, and traceability.



Global vs. U.S. Trends in CRM Transformation



- ✓ **U.S. Focus - Compliance-First:** Stringent regulations drive U.S. organizations to prioritize validation, auditability, and data privacy in CRM decisions.
- ✓ **Global Priority - Scalability:** Non-U.S. markets often seek scalable platforms that support multilingual, multi-country operations efficiently.
- ✓ **Unified Platform Demand:** Multinational companies increasingly require a single CRM backbone with flexible regional configurations.
- ✓ **Regional Risk Profiles:** Different regions carry varying regulatory burdens and technology maturity, requiring context-aware implementation plans.

Framework for Evaluating CRM Partners



Scalability & Performance: Can the CRM handle global scale, hybrid access, and heavy data volumes without performance issues?

AI & Automation Readiness: Assess the vendor's AI maturity, roadmap, and how AI features integrate with your data sources.

Compliance & Validation: Look for partners with proven GxP validation experience and built-in audit and traceability features.

Integration Ecosystem: Evaluate the ease of integration with your MDM, ERP, digital marketing, and analytics tools.

Total Cost of Ownership: Include implementation, training, upgrades, validation, and managed services-not just license fees.

Service & Governance: Partner success depends on robust managed services, SLAs, and governance processes.

Visual Comparison – What Top CRMs Prioritize



Vendor A: Compliance Focus

Strength lies in data governance, audit readiness, and strong support for regulatory alignment.



Vendor B: Integration Leader

Offers robust APIs and middleware support, enabling seamless connectivity with enterprise platforms.



Vendor C: AI & Analytics

Emphasizes automation and predictive analytics, delivering next-best-action tools for reps and managers.



Different Strengths, Different Fits

Each platform excels in different domains.
Alignment with your business model is more critical than feature parity.

Strategic Balance – The Four Pillars of CRM Success



- ✓ **AI - Intelligence at Scale:** Delivers smarter engagement through recommendations, automation, and contextual insights if powered by quality data.
- ✓ **Compliance - Trust by Design:** Requires validation, audit trails, and adherence to regulatory standards across GxP, HIPAA, and beyond.
- ✓ **Integration - Seamless Connectivity:** Unifies CRM with other systems like ERP, MDM, and marketing automation to reduce silos. Ensure CRM integrates with Medical Information and Access systems for a unified HCP view
- ✓ **Scalability - Future-Ready Architecture:** Supports growth via modular design, cloud infrastructure, and flexibility for regional deployment.

Practical Evaluation Approach



Use Weighted Scoring

Customize criteria weightings to reflect business priorities-e.g., compliance (30%), scalability (25%), AI (20%), integration(25%).



Plan for Integration

Evaluate how well the CRM integrates with your real-world tech stack, not just what's claimed on spec sheets.



Test with Real Data

Use sandbox environments or demo sessions with your data to validate capabilities-not just vendor demos.



Calculate TCO Holistically

Include training, managed services, data migration, and validation costs—not just licensing fees.

Selection Pitfalls

- ✓ **Overvaluing UI:** A clean interface is important, but scalability, data model depth, and service flexibility matter more.
- ✓ **Ignoring Validation Early:** GxP and HIPAA readiness must be designed in from the start not retrofitted during implementation.
- ✓ **Poor Cross-Team Alignment:** CRM strategy must bridge Commercial, IT, Compliance, and Field Ops to avoid costly misalignment.
- ✓ **Service Blind Spots:** Choosing software without evaluating implementation or support services creates long-term friction.





No Change Management Plan

CRM rollouts often fail due to lack of communication, training, and stakeholder engagement.



Data Governance Gaps

Without clear ownership of data quality, validation, and migration, AI and reporting suffer.



Underestimating Validation Effort

Documentation, audit trails, and validation protocols require significant planning and time.



Skipping Pilots or Phasing

Global rollouts without phased testing increase the risk of systemic failures and rework.

Case Study #1 – Specialty Pharma Transformation



- **Legacy System Challenges:** A mid-size specialty pharma faced audit delays and slow field insights due to outdated, siloed CRM systems.
- **Compliance-First Strategy:** Transformation prioritized validation, audit trails, and faster access to accurate field data for inspectors.
- **Operational Enablement:** Integrated dashboards empowered reps with timely insights, while reducing data prep time for audits.
- **Result - Streamlined Audits:** Regulatory inspections became faster and smoother thanks to centralized, validated data access.



Case Study #2 – Emerging Biotech CRM Assessment



- **Early-Stage Scalability Focus:** A U.S.-based biotech needed a CRM that could support phased commercialization without constant re-platforming.
- **Modular Architecture:** The selected CRM allowed for plug-and-play modules-enabling tailored growth from pre-launch to full commercial scale.
- **Low Total Cost of Ownership:** Prioritized cost-efficient licensing, managed services, and lightweight validation to stretch limited resources.
- **Future-Proofing:** Architecture designed to evolve with new data types, partners, and geographies over 5+ years.

Key Takeaways



Strategic Alignment Is Key

CRM decisions should support long-term commercial and compliance goals-not just short-term UX improvements.



Prioritize Integration and Scalability

Modern CRMs must be architected for seamless data flow and growth across global regions and business functions.



AI Demands Data Maturity

AI and automation are only as good as the data pipeline and governance feeding them.



Balance Innovation with Compliance

Smart design requires disciplined validation processes and cross-functional collaboration from day one.



Thank You for Joining

We appreciate your time and attention during today's webinar. Your CRM journey is strategic make every decision count.



Resources Mentioned

IQVIA 2024 Trend Report
Deloitte Life Sciences Outlook 2025
Improzo CRM Strategy Brief



Let's Continue the Conversation

Questions?
Feedback?
Connect with Jason Harlander at Improzo for deeper insights into CRM transformation.
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Thank you



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