

THE FUTURE OF CRM IN LIFE SCIENCES:

A foundation for intelligent customer engagement

Future CRM systems need to integrate more aspects of the customer experience by orchestrating omnichannel engagement, capturing real-time insights, and supporting personalized, compliant interactions across the customer journey.

Introduction

The role of customer relationship management (CRM) is no longer confined to tracking calls or logging sample requests. Today's platforms serve as the connective tissue across commercial functions, integrating marketing automation, sales enablement, medical affairs, field service, and data analytics tools. CRM systems now integrate more aspects of the customer experience by helping to orchestrate omnichannel engagement, capturing real-time insights from every touchpoint, and supporting personalized, compliant interactions across the customer journey. The platforms are now central to how modern pharma and life sciences organizations operate and grow.

The evolution of intelligent customer engagement

CRM platforms have evolved in part because of the changing nature of life sciences business. CRMs used to focus on tracking call activity, medical inquiry requests, order forms, and samples requests and putting it all in one place. Today, emphasis has shifted away from tracking and incentivizing call activity to focus on arming sales reps with information so they can be as prepared as possible before they approach providers. The platforms can guide sales reps on the best time to make contact and send personal emails to physicians and nurse practitioners.

These changes result in part from a shift from mass-marketed products to treatments for rare and ultrarare diseases. As companies invest more and more in each individual treatment, the value of a prescription increases. Today's CRM systems empower sales reps with relevant data and self-service tools to enable individuals to be as prepared as possible.

As CRM systems have evolved, they have grown more interconnected than ever before. Currently, many vendors and services connect directly to a company's CRM. These include software for data analytics, document management, product ordering, and more. When starting out, many SMBs began with a pragmatic focus on immediate growth, prioritizing sales enablement over long-term infrastructure. Later integrations were added piecemeal around the CRM system, rather than built on a unified data foundation.

Veeva and Salesforce are ending their long-running partnership, with Veeva's old CRM set to

power down in December 2029. This break-up means that 85–90% of the life sciences market is currently seeking its next CRM. However, instead of viewing this event as a problematic disruption, life sciences companies have an opportunity to reflect holistically on the effectiveness of their customer engagement and proactively start creating new engagement strategies and refreshing their technology stack to align with business needs.

Migrating to a new CRM platform can take some organizations 2–3 years, which means that businesses must begin their assessment and planning now to prepare for their move.

This is the time to evaluate whether the interconnectedness and integration of the platform should continue as is, or whether to explore other alternatives, such as moving to a centralized data warehouse and building integrations to the CRM system, to ensure that you are not beholden to any one company or technology. In addition to considering workflows, evaluate data architecture and whether your current strategy will work moving forward.

The window for assessment and planning is closing quickly, so whichever way small-to-medium pharma and life sciences companies decide to go, one thing is certain: this transition will be more than a simple lift and shift from one CRM to the next, even for companies staying with the same provider.

Build a foundation for innovation

In addition to the way CRM platforms are evolving, companies must consider how CRM providers are innovating and the role emerging technologies such as AI will play.

Due in part to the integration of AI-driven customer insights, the pharma and biotech CRM market is projected to grow by 18.1% per year between now and 2029, according to data from the Business Research Company.¹ Companies that delay CRM modernization risk being left behind.

As they embark on assessment and planning, now is the time for every company to evaluate its end-to-end workflows and develop its use cases for AI. Some, such as suggestions of when to look at claims and sales data, when to speak to a doctor, and when to send out an email, will be helpful for all life sciences and pharma companies. But each company will have their own, individual use cases that are unique to their business. These can range from simple, such as managing calendars or call planning, to more complex. For example, AI can help sales reps reach doctors in cases where a treatment benefits only a few hundred patients across the US.

For example, a rare disease company launching a new therapy might want alerts based on updated claims data, automated insights that flag key providers for engagement, or even predictive models that surface geographic pockets of potential patients. These are some of the capabilities emerging from CRM providers that integrate AI. However, these will work only if the underlying data is solid and workflows are designed with intentionality.

Integrating Emerging Capabilities



Updated
claims data
alerts



Automated
engagement
insights



Predictive
patient
identification

If a company rushes headlong into using AI without a cohesive strategy, it risks repeating the mistakes many companies made when rushing out to implement a CRM solution. Businesses need to align on critical areas such as which datasets to feed into the systems, such as HCP engagement history or clinical trial data; which channels to develop, such as field sales or medical science liaison teams; and ultimately, how to set up the infrastructure so they can capitalize on the tool.

Without a solid foundation, even the most advanced tools risk underperformance and disengagement from the teams that might benefit from them. To drive sustained adoption, organizations should establish structured feedback loops that allow frontline users to inform ongoing optimization, both to improve the tool and to strengthen alignment between technology and business outcomes.

Doing the groundwork of defining use cases now, before migrating to a new CRM, means that any capabilities that are added later will be better integrated into business processes and aligned to drive better business outcomes. This applies not only to AI but other innovative technologies, such as data warehousing and master data management systems.

1. The Business Research Company, "Pharma And Biotech CRM Software Market Report 2025," January 2025

Approach your decision thoughtfully



The CRM platform you choose today will shape how your business sells, scales, and serves customers for years to come.

It won't simply support current operations but will either constrain or enable future growth. That's why the selection process must go beyond features and cost to align with your long-term strategy, support data-driven decision-making, and adapt as your business needs evolve. Industry reports indicate that more than two-thirds of top-performing businesses rely on a managed service provider to bolster their strategic advantage.²

At Conexus, we guide life sciences organizations through this pivotal decision with a structured, use-case-driven approach that ensures alignment between technology and business goals. Our process helps clients look beyond features and cost to ensure the CRM platform supports their long-term vision, data strategy, and commercial ambitions.

What to evaluate when choosing a CRM platform

Follow these steps to ensure your CRM decision is grounded in operational reality, long-term strategy, and input from all key stakeholder groups:

- 1. Inventory your current ecosystem:** Map your workflows, data sources, and content management processes. Identify friction points and dependencies across teams, platforms, and channels.
- 2. Assess your current strategy:** Understand what's working, where there are gaps, and how a new CRM platform can address business pain points or unlock new value.
- 3. Benchmark CRM providers:** Evaluate potential platforms for scalability, interoperability, and fit with your business model, including how well they support field enablement, data analytics, and omnichannel coordination.
- 4. Make a forward-looking decision:** Choose a CRM that's not only right for today, but adaptable enough to support your future growth—whether that includes market expansion, new product launches, or potential acquisition.

² PwC, "PwC Targets Managed Services Opportunity," PwC, September 19, 2023

Plan with the full picture in mind

In parallel, factor in the broader operational realities that will influence your timeline and approach:



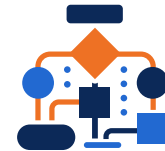
Resource planning

Determine whether you have the resources, time and budget for a full reimplementation or a phased approach.



Timing and alignment

Align your migration roadmap with major business initiatives, such as product launches or organizational shifts.



Change management

Plan for user training, communications, and field readiness to reduce disruption and drive adoption.

Above all, treat your CRM selection as more than a software upgrade. This is a foundational decision, one that will shape how your business captures insights, engages customers, and delivers value for the decade ahead.

Think of your current CRM like a house you've lived in for a decade. Over the years, you've made improvements and added new features, but your needs have likely evolved. Now is the time to assess whether a renovation will support your long-term goals or whether it's time to invest in a new home that better fits how you live and work today, even if the upfront cost is higher.

Choosing a CRM system isn't just a technical decision; it defines the environment where your teams will operate, collaborate, and drive growth for the next decade.

Leveraging a managed service provider with deep domain expertise in both Veeva and Salesforce, and who can evaluate how your existing ecosystem is built today, can help you better understand how moving CRM platforms will impact the future of your business.

Set for success

Not deciding is not an option. As CRM platforms evolve, much of the innovation, including AI capabilities, will be embedded directly within their ecosystems. The earlier businesses begin assessing their position, the better equipped they'll be to make a strategic, well-informed decision rather than one driven by time pressure.

Success depends on more than just choosing the right CRM platform; it requires aligning that platform with optimized business processes, a clear data strategy, and long-term commercial goals.

When all of these elements work together, your CRM becomes a powerful tool to support growth, innovation, and sustained value.

About **Conexus Solutions, Inc.**

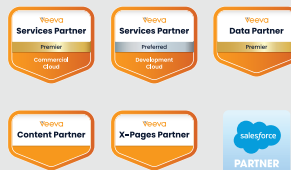
At Conexus, we combine deep industry knowledge with specialized talent to support meaningful progress for pharma and life sciences companies. Our team brings practical experience in commercial operations and technology, helping organizations strengthen capabilities, navigate change, and deliver results efficiently.

By aligning strategy with the right tools, we help clients reduce risk, respond to evolving market demands, and build long-term value.

Schedule a consultation at cnxsi.com.



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