

**RIGHT ON TIME:**

# When to Move to Vault CRM Matters More Than You Think

How timing decisions shape execution, flexibility, and downstream impact.

# Introduction

For many life sciences organizations, Veeva CRM remains a familiar and reliable system. Commercial and medical teams know how to work within it, and day-to-day operations continue without disruption.

At the same time, migration conversations are getting harder to defer. Questions about timing, budget, internal capacity, and long-term flexibility are starting to surface — often without clear answers. What once felt like a distant platform change now requires active planning, even if execution still feels far off.

**Support for Veeva CRM ends in December 2029, requiring customers to migrate to remain within the Veeva ecosystem.**

**But for many teams, the larger challenge isn't the date on the calendar. It's deciding when and how to move before options narrow.**

This article walks you through what to expect when migrating from Veeva CRM to Vault CRM, including the stages of a smart migration, execution pitfalls to avoid, and how teams can prepare early instead of reacting later.

# Why Companies Are Moving Sooner Rather Than Later

## **Veeva CRM Is Stable — But No Longer Evolving**

**What has changed is where Veeva is focusing its future investment.**

Veeva CRM is now in maintenance mode. While it remains supported, it is no longer evolving. New development and innovation have shifted to Vault CRM, and that distinction matters for leaders who rely on CRM to support commercial execution and medical engagement.

*Vault CRM became generally available in 2024, and migrations are now underway across the ecosystem, with many organizations planning their move between 2026-2027.<sup>1</sup>*

**Staying put can still feel like the lowest-risk option. But it also means anchoring critical workflows to a platform that will not advance alongside the business while newer capabilities are being built elsewhere.**

## **Where Innovation Is Actually Happening**

Enterprise investment in AI solutions is projected to grow from **\$307 billion in 2025 to \$632 billion by 2028**, reflecting how quickly enterprise platforms are evolving to support more automated, data-driven decision-making.<sup>2</sup>

**That shift is visible in where Veeva is focusing its product development.**

New capabilities are being built on Vault CRM, including AI-enabled workflows, more advanced

commercial tools, and expanded support for medical and medical affairs teams. These capabilities are not being backported to Veeva CRM and adopting them requires moving to the newer platform.

**For commercial, medical, and technology leaders, this creates a clear decision point. Remaining on Veeva CRM means operating without capabilities that are already shaping how peers plan, engage, and execute.**



## Waiting Feels Passive — But It’s an Active Choice

At this point, the decision to wait does not feel like a decision at all. The platform still works. Day-to-day operations continue. There is no immediate pressure forcing action.

### But waiting is an active choice with compounding tradeoffs.

Each year spent on a system in maintenance mode is a year without access to newer efficiencies, automation, and decision support. That gap is easy to overlook early on, but it becomes harder to justify as peer teams adopt tools that materially change how work gets done.

Timing also affects how much control leadership retains. As December 2029 approaches, migration resources across the ecosystem tighten — including Veeva, systems integrators, and experienced partners. Leaders who delay often find themselves navigating compressed timelines, fewer options, and less flexibility to align the work with internal priorities.

**For many executives, moving earlier is not about urgency. It’s about preserving control — sequencing the migration on their terms, aligning it with budget cycles, and avoiding a reactive scramble driven by an external deadline.**

## Why This Isn’t Just an IT Project

Although the migration to Vault CRM is often initiated within IT, its impact quickly extends beyond technology teams.

**Decisions about timing, scope, and sequencing start to touch commercial leadership, medical and medical affairs teams, finance, and executive sponsors.**

The effort brings more than platform changes into scope — integrations, reporting and configuration work, enablement, and coordination across internal teams and external partners tend to surface alongside it.

The value of Vault CRM also shows up beyond the technical layer. Capabilities in areas like AI-enabled workflows, commercial execution,

and medical and medical affairs support influence how teams plan, engage, and operate day to day. When those capabilities matter to the business, conversations about timing naturally widen.

This is usually the point where things get more complex. Sequencing decisions start to affect business teams. Testing requires real-time feedback from people outside IT. Questions about priorities and outcomes come into focus.

Teams that involve IT, business leaders, and executive sponsors earlier tend to navigate these moments with greater clarity. The work feels less reactive, and decisions land with fewer surprises as timelines take shape.



# 5 Steps to a Smart Vault CRM Migration



## Execution

Migration takes place alongside day-to-day operations. Earlier decisions influence how controlled this phase feels, with broader change unfolding after go-live as new capabilities are adopted.



## Planning

Ownership and sequencing become clearer. Capacity, testing effort, and coordination requirements begin to shape expectations.



## Strategy

Timing, scope, and sequencing begin to take shape. Constraints and dependencies start to influence direction and tradeoffs.



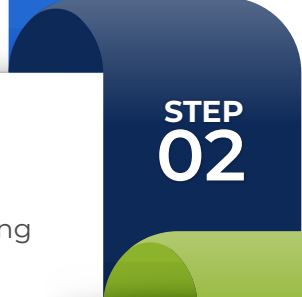
## Assessment

Configuration, integrations, and data are reviewed in detail. Reporting and dashboards often require rework as schemas and field names change, revealing complexity as dependencies come into focus.



## Education

Teams align on why Vault CRM exists, what will change, and what will stay familiar. Establishing a shared understanding early helps reduce friction later.





## Common Execution Pitfalls and How to Avoid Them

Even when teams understand the overall path, specific challenges tend to surface consistently during execution.



### Business Impact Shows Up Late

Early planning may move smoothly, but tension often surfaces once sequencing, testing, or field enablement decisions begin to affect business teams directly. At that point, value questions emerge under pressure, and course correction becomes harder.



### Integrations Set the Timeline

Early plans usually assume internal readiness will set the pace. That assumption shifts once third-party systems enter the picture. External vendors move at different speeds, and those dependencies shape sequencing, testing windows, and cutover timing. This is often where plans that seem solid on paper begin to tighten.



### Legacy Complexity Carries Forward

Workflows, customizations, and integrations added incrementally over the years often no longer reflect how the business operates today. Migrating them forward without review adds fragility and increases rework later in the process.



### Waiting Limits Your Options

As migration windows narrow, access to experienced Veeva resources and partner availability become more constrained, along with internal budget flexibility. Decisions that once felt optional start to feel forced, increasing both risk and operational strain.

# Pre-Migration Readiness Checklist

This checklist is intended for commercial, medical, IT, and operations leaders who are ready to take the next steps and want a practical way to assess readiness before setting timelines.

The questions below reflect the areas that most often shape how smoothly a migration unfolds, where delays tend to occur, and how much control teams retain.

## Integration Complexity & Vendor Readiness

- A complete list of external integrations is documented
- Third-party vendor readiness and potential delays are understood
- Budget input has been gathered from external vendors

## Budget & Timing

- Budget is allocated for migration, integrations, testing, and follow-on enhancements
- Timing constraints are understood (fiscal calendar, blackout periods, sales meetings)
- A plan exists to secure the budget if it has not yet been allocated

## IT and Business Alignment

- IT and business leaders are aligned on priorities and expected outcomes
- Executive sponsorship is confirmed

## Clear Business Reason to Migrate

- There is a clear business reason to migrate beyond the December 2029 deadline

## Capabilities and Roadmap Planning

- Planned Vault CRM capabilities are defined (e.g., Campaign Manager, Service Center, Veeva AI, Deep AI Agents)
- Migration scope is clearly separated from post-migration enhancements

## Internal Resourcing and Capacity

- Internal owners and subject-matter experts are identified
- Time and capacity requirements are understood
- Resources are available for UAT and testing

## The Decision Point

By now, it's clear the question isn't whether a move to Vault CRM will happen. It's when, and how much control your team retains when it does.

Teams that wait until the deadline approaches often find their options narrowing. Teams that engage earlier have more room to align timing, scope, and sequencing with the business's operating model.

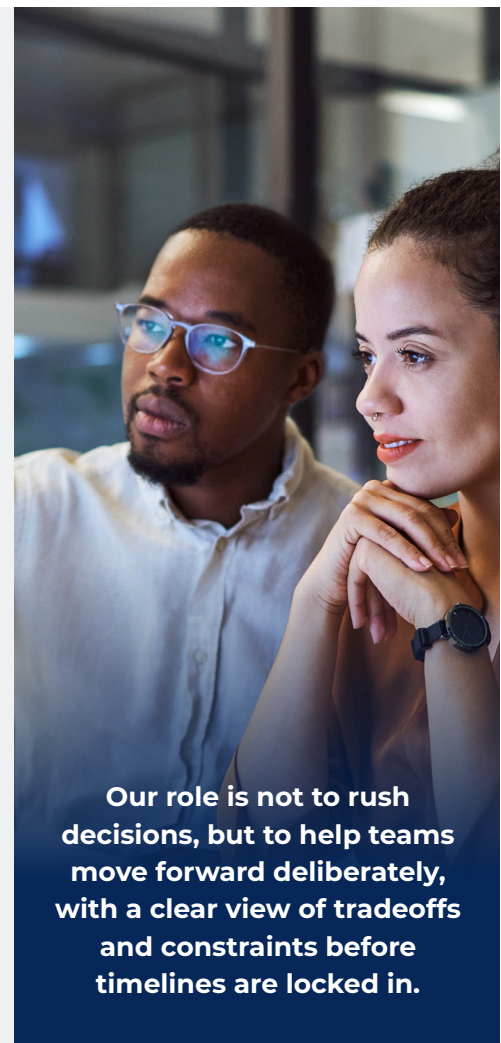


### Where Conexus Helps:

Conexus partners with life sciences organizations as they prepare for and execute the move to Vault CRM, helping teams navigate migration with clarity, coordination, and control:

#### We support migration efforts by helping organizations:

- **Align IT, business, and external partners** around a shared migration approach
- **Bring structure** to sequencing, integrations, testing, and cutover planning
- **Reduce risk** by addressing integration complexity and vendor dependencies early
- **Clarify what moves now** versus what is better phased in post-migration
- **Support SIT and UAT** to keep business operations stable through transition
- **Prepare teams** through role-based training and enablement aligned to new Vault CRM workflows
- **Provide structured project management** to coordinate stakeholders, manage dependencies, and keep migration milestones on track



**Our role is not to rush decisions, but to help teams move forward deliberately, with a clear view of tradeoffs and constraints before timelines are locked in.**

# About **Conexus Solutions, Inc.**

We combine deep industry knowledge with specialized talent to support 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](https://cnxsi.com).

#### Sources

1. Veeva Systems, *Veeva Vault CRM Now Available for All New Customers*, PR Newswire, April 2024
2. IDC, *FutureScape: Worldwide AI and Automation Forecast, 2024–2028*



The **team** behind your **team**.



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