



## CUSTOMER SUCCESS STORY:

# Accelerating the Transition to a Modern, Connected CRM Platform

DELIVERING A FAST, ACCURATE, AND SCALABLE MIGRATION TO VEEVA VAULT CRM

## The Circumstances

The organization was transitioning from Salesforce-based Veeva CRM to Vault CRM under aggressive timelines while needing to maintain continuity across commercial operations, reporting, integrations, and downstream systems.

In addition to the technical migration, the program required alignment across business and IT teams, simplification of complex persona structures, and preparation for future scalability and AI-driven capabilities within Vault CRM.

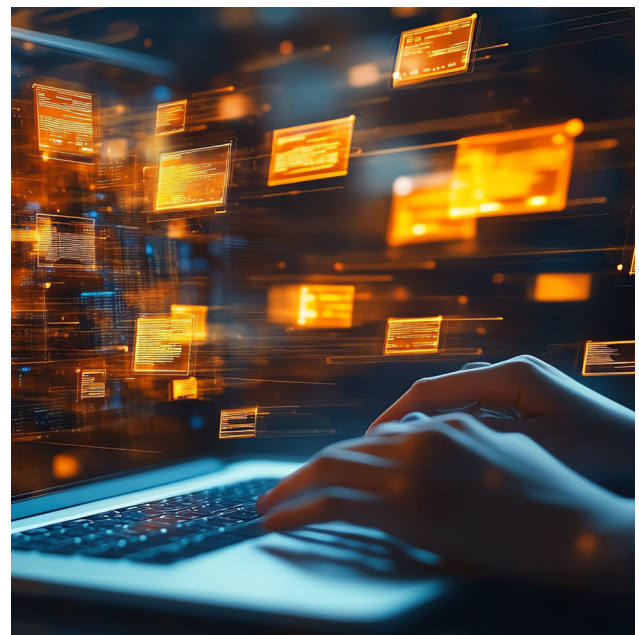
### The organization needed a structured approach that would:

- Minimize disruption to field and commercial teams
- Preserve reporting and data consistency
- Ensure integrations continued operating reliably
- Support adoption and operational readiness post go-live
- Deliver a scalable and future-ready CRM foundation
- Coordination across business, IT, and vendor teams

## The Solution

**Conexus enabled a rapid, low-risk migration from Salesforce-based Veeva CRM to Vault CRM, delivering a fully integrated, scalable platform in as little as 6–8 weeks.**

This structured partnership model ensured the organization had the right expertise to manage the migration while maintaining continuity across business and technology teams. Close coordination with Veeva, combined with dedicated migration and managed services support, provided the oversight, technical depth, and hands-on execution required to guide the transition and prepare the environment for adoption.



## The engagement included:

- ✓ End-to-end migration oversight
- ✓ Migration planning and execution support
- ✓ Integration and reporting continuity
- ✓ Data validation and readiness support
- ✓ Persona and platform standardization
- ✓ Hands-on guidance for adoption and operational readiness
- ✓ Coordination across business, IT, and vendor teams

Conexus ensured downstream systems, reporting environments, and operational processes remained aligned throughout the transition to minimize disruption and accelerate readiness.

## The Results

The migration established a reliable, connected, and scalable Vault CRM foundation — improving operational visibility while positioning the organization for future growth and innovation.



### Accelerated Migration Timelines

Successfully completed migrations in as little as 6–8 weeks for organizations operating under compressed timelines.



### Business Continuity Maintained

Rebuilt and validated reports, integrations, and data flows to preserve consistency across analytics and downstream systems.



### Simplified Platform Management

Standardized and reduced personas from as many as 30 profiles to a streamlined model, simplifying testing, support, and administration.



### Scalable, Future-Ready Architecture

Enabled growth across teams and product launches on a unified Vault CRM platform designed to support future AI-driven capabilities.



### Improved Operational Visibility

Delivered more consistent and connected data, helping teams make faster and more informed decisions.

Conexus provided the structure, technical leadership, and hands-on execution needed to ensure the environment was fully integrated, validated, and ready for adoption — on schedule and with minimal disruption.



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



📞 (609) 536-6009

✉ info@cnxsi.com

🌐 cnxsi.com

📍 3121 US Hwy 22 East Suite 303  
Branchburg, NJ 08876