VAULT CRM MIGRATION READINESS:

How Early Assessment Reduces Surprises

How life sciences teams can clarify scope, uncover dependencies, and address readiness gaps before migration execution begins.

Introduction

> **The biggest surprises in Vault CRM migration come from assuming the work is only about moving the system.**

After all, the CRM is already in place. Commercial and field teams already use it. The business processes exist, and the system has history, structure, and familiar ways of working.

As teams get closer to the active project phase, that assumption gets tested. Existing decisions, handoffs, and operational realities start to surface as vendors, internal stakeholders, and technical requirements begin moving together.

> **That is why early preparation matters. It gives teams a clearer view of what the switch to Vault CRM will touch before preventable surprises create added cost, rework, or project pressure.**

What Assessment Reveals Before Vault CRM Migration Begins

Even when teams understand the need to assess early, they may still treat the work as a light planning exercise rather than a dedicated part of the project.

That is where teams can miss the existing CRM complexity that later shapes timing, cost, and level of effort.

A CRM environment usually reflects years of business decisions, technical adjustments, evolving workflows, reporting needs, and integration choices. Some of that structure may still support the business well. Some may no longer be used. Some may work in the current system while creating unnecessary effort once the project begins.

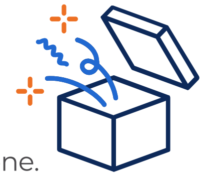
This is why assessment needs to look beyond whether the system can move. It should help teams understand what they are actually bringing into the process.

That may include objects, record types, or flows that are no longer needed. It may include workflows that still exist in the system, even though the business process behind them has changed. It may also include integrations that are live, but not optimized for the path ahead.

The value is in identifying these areas early enough to separate what needs to move, what should be cleaned up, and what should be handled later as a future enhancement.

> **"Migration often reveals existing complexity rather than creating it, which makes early visibility into the current environment critical."**

Where Migration Surprises Usually Show Up



Live does not imply migration-ready.

Surprises tend to surface when teams mistake a functioning CRM environment for a migration-ready one. On paper, each workstream may look manageable. Once the project is underway, the connections between vendors, internal teams, integrations, testing, and configuration become harder to ignore.

When Integration Work Depends on Outside Teams

During a recent project, there was a team that was already weeks into kickoff when external partner plans and estimates were still being clarified. Those conversations should have happened much earlier, before timelines started to tighten.

The issue was timing. External partners needed to understand what was changing, what they owned, and when their input was required. Without that alignment, decisions had to be worked through after the work was already moving.

Integrations can create similar issues because they involve more than confirming that a connection exists. Teams also need to understand how each system will connect in the new environment, who owns that coordination, and whether a vendor needs to redirect, reconnect, or validate anything before the work begins.

A live integration may still require planning if the endpoint, connector, or validation process changes.

When Decision Ownership Is Unclear

Surprises can also appear when internal teams need to make decisions faster than expected.

The project may require business, technical, and operational stakeholders to confirm what should move, support testing, validate workflows, or answer questions about existing configuration. Teams may know the system, but they still need the right people available at the right time to validate what the project team is seeing. This is where preparation affects momentum.

When teams clarify decision-making early, they reduce the chance that the work gets held up by questions no one is ready to own.

When Configuration Carries Years of Context

Configuration can also create surprises because functioning systems often carry years of history.

A team may find objects, record types, flows, or reports that still exist because they once supported a business need. Some may still matter. Others may reflect older processes, workarounds, or decisions no one has revisited in years.

Once migration begins, that history becomes part of the work. Teams need to decide what should move, what should be cleaned up, and what should wait for a later optimization effort.

The system may work because teams have adapted over time, but migration brings the underlying decisions back into view.

What Prepared Teams Do Differently

Prepared teams treat proactive review as part of the project, not as a preliminary step to move through quickly.

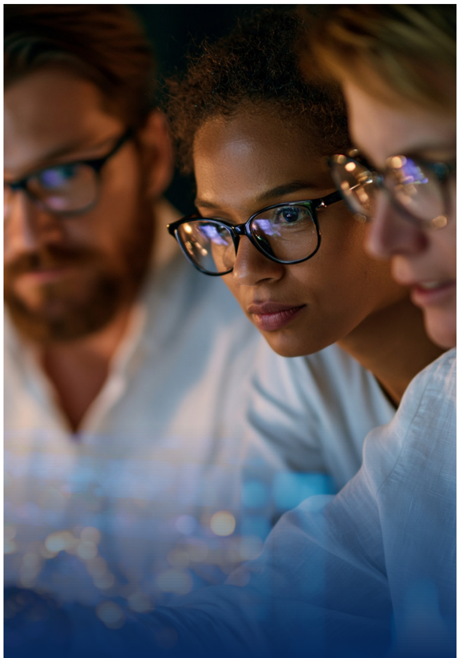
They use it to clarify what the work needs to accomplish, which systems and teams need coordination, and which decisions need to happen before the project moves forward. That includes reviewing integrations, vendor requirements, internal ownership, testing capacity, data quality, reporting needs, and configuration details early enough to make informed decisions.

For example, a prepared team may identify objects, record types, flows, or reports that no longer support the business in the same way. Instead of carrying everything forward by default, they decide what needs to move, what should be cleaned up first, and what belongs in a later optimization phase.

That distinction keeps the Vault CRM project focused on true requirements rather than turning every improvement idea into scope. It also gives business and technical stakeholders a clearer way to evaluate tradeoffs before timelines are locked.

Prepared teams also align the stakeholders involved in the work. They know who owns decisions, who needs to validate the system, who manages vendor coordination, and who supports cutover and stabilization. When those responsibilities are clear, questions can move through the project without unnecessary delays.

The strongest preparation does not make the work more complicated. It helps teams move through the decisions and handoffs already built into the current CRM with more clarity.



Readiness is not about moving everything as-is. It is about knowing what belongs in the move, what should be cleaned up, and what should wait.

Vault CRM Migration Readiness Checklist

A readiness review should clarify the current CRM environment, identify key handoffs, and separate true migration requirements from work that should happen before or after the move to Vault CRM.

A practical Vault CRM migration readiness checklist should include:

Ownership and governance
Who owns decisions, approvals, issue resolution, and stakeholder alignment?

Integration review
Which integrations need to be optimized, reconnected, or validated for the migration path ahead?

Vendor readiness
Which external partners need timelines, requirements, estimates, or technical inputs confirmed before migration work begins?

Business process and workflow review
Which workflows still support the business, and which reflect older ways of working?

Configuration and data review
Which objects, record types, flows, or other configuration elements are no longer needed, and what data is tied to what will actually move?

Reporting considerations
Which reports depend on existing configuration, data structures, or business logic that need to be reviewed?

Timeline and coordination points
Which internal teams, vendors, or systems need to be aligned before the migration is underway?

Testing and UAT capacity
Who needs to test, validate, or sign off, and when will they be available?

Migration vs. enhancement decisions
What must move now, what should be cleaned up first, and what should wait for a later optimization phase?

What This Means for Teams Planning Their Migration

Vault CRM readiness starts before timelines are locked and the project is underway.

The strongest efforts are shaped early, when teams still have time to clarify scope, review integration and vendor needs, assign ownership, and decide what should move versus what should wait. That early clarity helps life sciences organizations avoid discovering critical details after the work has already started.

The goal isn't to make the transition feel larger than it needs to be. It is to make the work more predictable.

When teams treat proactive review as a meaningful part of planning, they can reduce preventable surprises and move forward with a clearer view of the environment, the people involved, and the decisions ahead.

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