

CASE STUDY



Migration to enable field users

Discover how a Boston- based biotech company **seamlessly migrated to Vault CRM.**

PromoMats

MedComms

OpenData

Veeva NETWORK

Veeva Link

Challenge

The client had, heavily invested in Veeva, faced internal hurdles planning their Vault CRM migration. Without a clear view of how the migration would affect their customized Veeva and integrated systems, the company struggled to define a comprehensive action plan. They also lacked a strategy to manage the full migration lifecycle spanning from program oversight to post go-live support, making it difficult to secure internal approval and budget for expert guidance.



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Solution

We provided a thorough pre-migration assessment and developed a comprehensive strategy for the entire migration lifecycle in partnership with Veeva.



Early deployment of Vault MedInquiry and Veeva Align to reduce workload



Collaborative sharing of customization and integration requirements



Joint review of the migration assessment report with stakeholders



Formalized agreement on pre and post-migration action plans



Established framework for a unified project plan with Veeva

Key Results

Our **strategic pre-migration planning** delivered significant value, creating a clear and efficient path forward for the company's Vault CRM migration.




Simplified migration scope through an **integrated project plan**



Provided clear **effort and budget estimates** for 2026



Minimized complexity by acting on key recommendations



Built trust by aligning closely with client needs



Reduced risk with a focused remediation plan