

Executive Perspective

AI-Enabled CRM Transformation

A perspective for commercial, medical, and technology leaders in life sciences on how to navigate CRM migration while minimizing disruption to the business and enabling AI adoption in live environments.

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CRM Migration: Business disruption or accelerator?

Life sciences CRM migration is no longer optional. By 2029, many organizations will be navigating overlapping migrations while platforms continue to evolve, all under growing pressure to accelerate AI adoption and deliver measurable impact from commercial and medical teams.

This creates a fundamentally different challenge than in previous CRM cycles. Migration is no longer primarily a technology decision. It is an execution problem that must be managed within live environments, where disruption is not tolerated, capacity is constrained, and change must deliver value early. As McKinsey research shows, up to 70 percent of large-scale transformations fail to achieve their intended outcomes, often due to challenges related to engagement, capabilities, and execution.¹

AI adds a new dimension to this challenge. Many organizations are delaying AI adoption until after CRM migration, missing the opportunity to use it as a stabilizing layer during transition. Others are already experimenting with AI in field and medical workflows, but struggle to achieve sustained impact when it is deployed without a robust data foundation, clear workflow integration, and enterprise-grade validation.

In these cases, AI outputs are inconsistent, trust is limited, and adoption does not scale, especially when underlying CRM data is incomplete or evolving during migration. When implemented differently, AI can act as a continuity layer, grounded in high quality, multi-source data, embedded directly into field workflows, and governed for accuracy and compliance, preserving how users access and act on insights across systems and maintaining execution as platforms evolve.

The defining constraint in this environment is not platform selection. It is the ability to maintain productive field and medical execution while systems, data, and workflows continue to evolve. When execution is disrupted, adoption weakens, and once adoption declines, value does not scale. This dynamic ultimately determines whether programs succeed in practice.

¹<https://www.mckinsey.com/capabilities/transformation/our-insights/why-do-most-transformations-fail-a-conversation-with-harry-robinson>
<https://www.mckinsey.com/capabilities/transformation/our-insights/perspectives-on-transformation>

Exponentially more complex

Many CRM migrations are still positioned around speed or transformation. Organizations are encouraged to move quickly to modern platforms or to use migration as a catalyst for broader change. While both narratives are compelling, they are often disconnected from how these programs unfold in reality.

Moving too quickly introduces instability, leading to rework and loss of trust. Pushing transformation ahead of execution readiness delays value and strains already constrained teams. Treating migration as a discrete event ignores the fact that platforms, data models, and workflows continue to evolve during and after the transition.

What has changed is not that CRM migrations occur in live environments, but the level of complexity and expectation under which they now operate. These programs increasingly involve multiple systems, data layers, and AI capabilities evolving in parallel, with far less tolerance for disruption to field and medical execution.

At the same time, organizations are expected to deliver value earlier, often before platforms are fully stabilized, and with constrained capacity. As a result, migration is no longer a phased transition but an ongoing operating condition that must perform while it evolves.

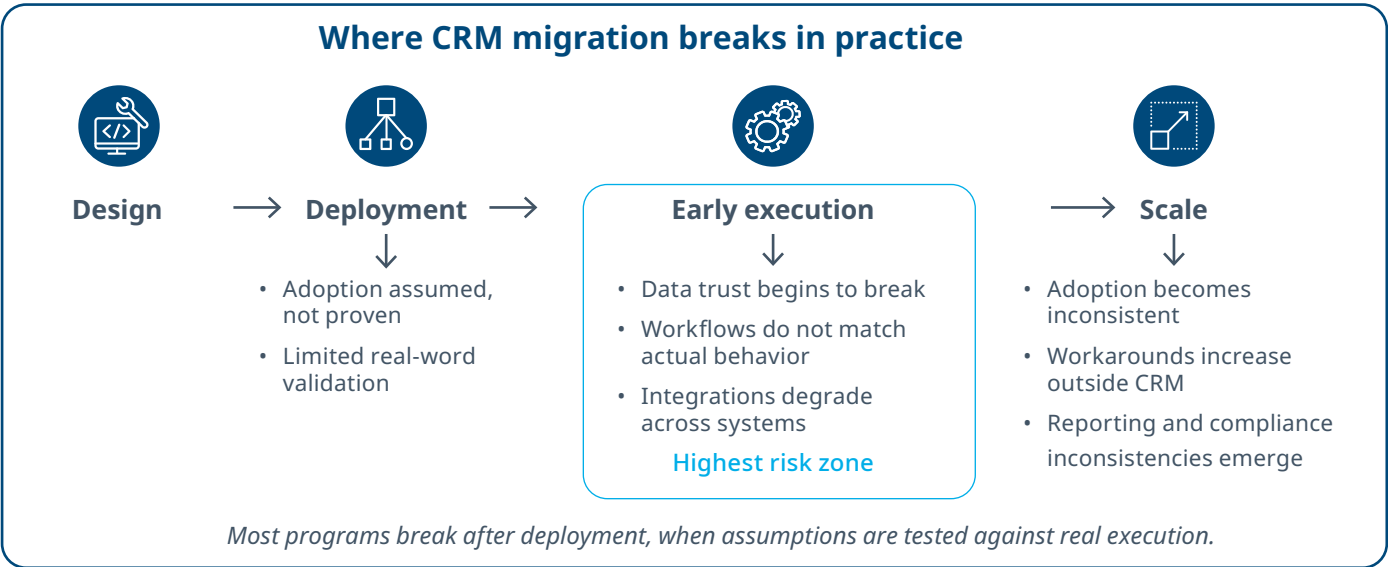
Numerous breakage points

Most CRM migrations do not fail because of technology limits. They fail when design assumptions collapse under real operating conditions, especially during coexistence when multiple systems must perform at once.

Programs typically break in predictable ways:

- Field behavior shifts to workarounds or disengagement
- Customer, interaction, and consent data becomes inconsistently trusted
- Integrations and reporting degrade during parallel run
- New workflows do not match how work actually happens in the field and medical teams
- Adoption is treated as a deployment event instead of a sustained behavior outcome

Programs often appear complete from a delivery standpoint, but these failure patterns emerge once they are exposed to real operating conditions. This is the critical gap between implementation and execution. Systems can meet design specifications and still fail in practice if they cannot sustain behavior, data trust, and workflow alignment under live use.



Defining success at scale

Across CRM migrations that scale successfully, a consistent pattern emerges. These programs maintain execution continuity while introducing change, ensuring that the business continues to operate effectively throughout the transition.

This is reflected in a set of conditions that consistently hold in successful programs:

- Field and medical teams continue to execute without disruption
- Customer, interaction, and consent data remain trusted across systems
- Integrations and reporting remain stable despite platform coexistence

- Adoption is demonstrated through consistent behavior, not assumed at go-live
- Compliance is validated continuously in the live environment

These are not delivery choices or best practices. They are the minimum conditions required for a system to function at scale. Programs that do not maintain these conditions may complete deployment, but they struggle to deliver sustained value.

Successful programs are built differently. They treat execution continuity as the governing constraint and sequence change around it. This shifts migration from a linear program to an operating model that must perform while it evolves.



The reality

- Fixed 2029 deadline
- Multiple concurrent migrations
- Platforms still evolving
- Partner capacity tightening



What breaks

- Execution slows during transition
 - » Adoption drops
 - » Value never scales



Successful migrations

- Sequence change, don't force it
- Prove workflows in real execution
- Scale based on evidence

AI should not wait for migration to finish

AI stabilizes adoption while everything else change

- Starts now inside workflows
- Reduces friction during change
- Reinforces adoption early
- Carries forward as platforms evolve



Execution continuity model



User interaction layer (AI-enabled)

Consistent across old and new systems



Execution workflows

Field + medical behaviors, decisioning



Systems in transition

Legacy CRM → new CRM (coexistence)

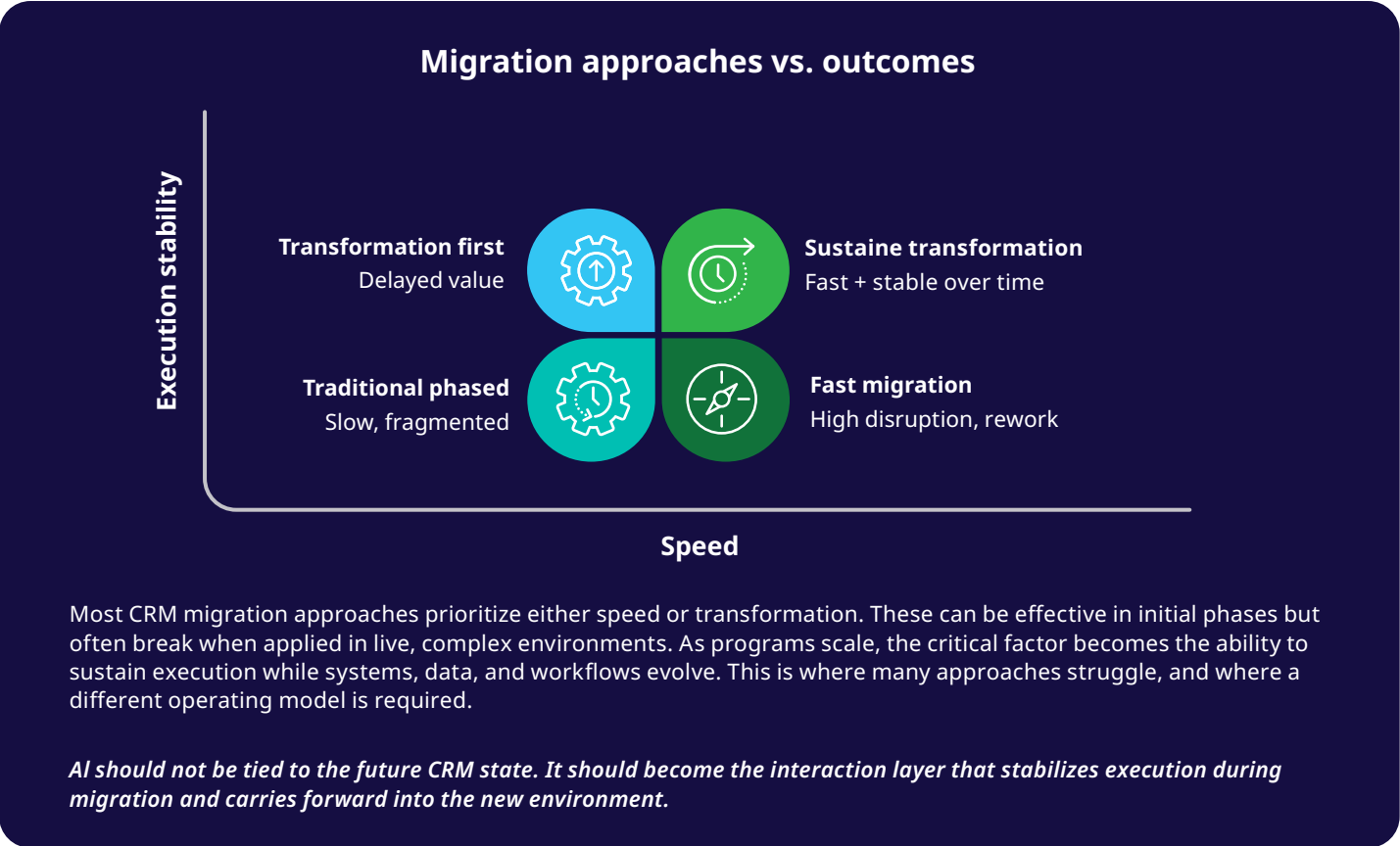
Execution continuity means the business can run at full speed while systems change. We define it with measurable conditions

- Stable daily execution for field and medical roles with no material productivity drop
- Trusted customer, consent, and interaction data across old and new environments
- Reporting parity and integration stability during parallel run
- Adoption measured as sustained behaviors over time, not training completion or go live
- Continuous compliance validation in the live environment, not only in test cycles

Execution continuity: Migrate without breaking the business

Execution-first migration is a response to this reality. It is not a philosophy or a sequencing preference. It is a delivery discipline designed to operate in live environments where change cannot interrupt execution.

In practice, this means core elements such as data integrity, integration stability, and workflow viability are validated under real operating conditions during coexistence, not assumed through testing or design. Programs are scaled only once execution is proven with actual field and medical users, rather than based on predefined timelines.



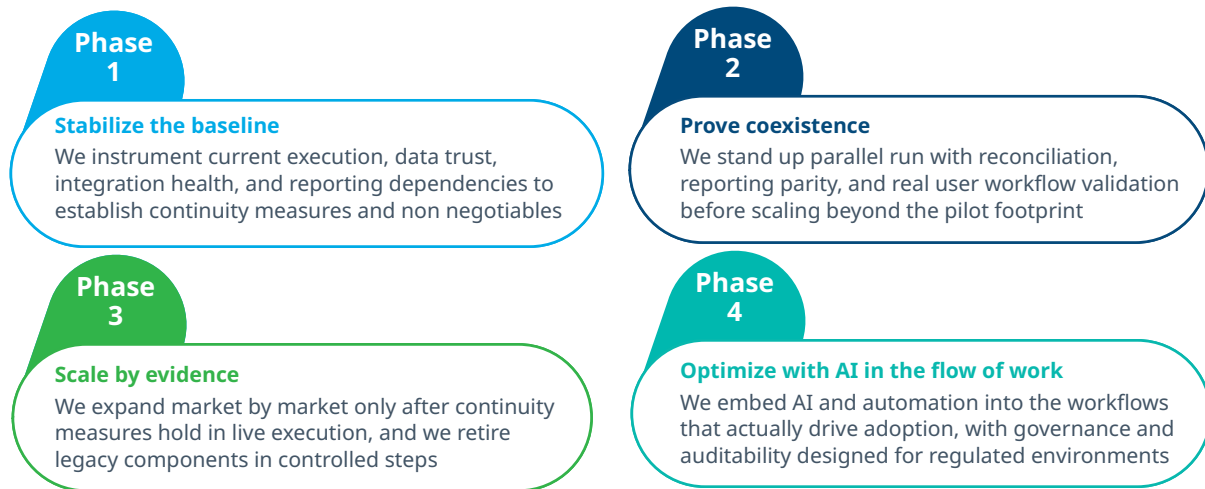
Scaling is done in controlled progression based on evidence, not on predefined timelines. Coexistence between systems is maintained deliberately until the new environment has demonstrated stability under real conditions.

This is where differences between partners become more visible. Many can define a future-state architecture or accelerate initial deployment. Fewer can manage

extended periods of coexistence without degrading performance. Even fewer have experience sustaining this across multiple markets, brands, and functions at the same time.

Execution-first delivery assumes that the most complex part of migration is not building the new system. It is operating confidently while both the old and new systems must work together.

The execution continuity delivery model



Why partner selection is shifting from build to execution

Traditional selection criteria such as certifications, speed of deployment, and prior implementation experience remain relevant, but they are no longer sufficient indicators of success. They tend to favor partners who can mobilize quickly and articulate a strong transformation narrative. This is often enough to win early phases of work, but not to sustain execution or deliver outcomes at scale.

However, as programs move beyond initial deployment and into sustained execution, the requirements change. The focus shifts to whether the partner can operate in a live environment, manage coexistence across systems, and maintain stability over time. It becomes critical to demonstrate the ability to handle the realities of field execution, compliance requirements, and ongoing platform evolution.

Partners who are optimized for design and initial build can struggle at this stage because their delivery models are not designed for prolonged coexistence or continuous validation. In contrast, partners with experience operating at scale in life sciences environments tend to differentiate through their ability to maintain execution while change is being introduced, particularly where regulatory, data, and field engagement complexities must be managed simultaneously.

Partner selection is shifting because the hardest part is not the build. The hardest part is the messy middle: months of coexistence where data, integrations, compliance, and user trust must stay stable while change continues. Certifications and speed predict early milestones. They do not predict whether execution holds through parallel run, multi market scale, and ongoing platform evolution.

Many partners can define a target state or shape a compelling transformation vision. Fewer can translate that vision into a pragmatic execution model that works under real operating conditions, adapting to constraints, validating in the field, and maintaining performance over time.

At the same time, capacity constraints are becoming a critical factor. As demand converges toward the 2026 to 2029 window, many large, horizontal system integrators are scaling across industries.

As a result, the differentiating capability is no longer design or initial deployment. It is the ability to operate the transition in live conditions, maintaining data trust, reporting stability, and user adoption through extended periods of coexistence. That capability is what determines outcomes in the 2026 to 2029 execution window.

AI as a continuity layer for execution

Data is where most programs either stabilize or begin to fail. When trust in data breaks, users revert to workarounds and execution moves outside the system. Data quality remains one of the primary barriers to effective transformation, with 64 percent of organizations citing it as a top challenge and 77 percent rating their data quality as average or worse, limiting the ability to scale digital and AI initiatives.²

This becomes even more critical as organizations introduce AI into field and medical workflows. AI can amplify productivity and decisioning, but only when it is grounded in trusted data and embedded into real workflows with governance, auditability, and adoption measures. In live life sciences environments, AI does not compensate for weak foundations. It exposes them faster.

The opportunity in this migration cycle is to use AI differently, not as a feature tied to a future CRM state, but as a continuity layer that stabilizes how users access insights and take action across systems during coexistence. When embedded into workflows rather than tied to a single platform, AI enables consistent engagement with data even as underlying systems evolve.

²[16 Digital transformation statistics for 2026](#)

AI as a continuity layer enables practical use cases during migration

- Guided next action in the flow of daily work, consistent across old and new systems
- Automated data quality and consent checks that prevent trust erosion during parallel run
- Standardized summaries and context that reduce dependence on a specific CRM interface
- Assisted documentation that reduces rep admin time without breaking compliance controls
- Adoption reinforcement by keeping behaviors consistent through cutover, then accelerating scale in the new platform

This shifts the role of AI in migration. It is no longer a post-migration enhancement. It becomes a mechanism for preserving execution continuity and accelerating adoption as systems evolve.



AI continuity lever diagnostic

Can your AI program sustain execution through CRM migration, or will it reset during transition?

A strong AI program can do more than improve productivity. It can act as a continuity layer that keeps field behavior stable while CRM platforms change underneath. This diagnostic assesses whether an AI capability will actually protect adoption and execution during migration, and then carry forward cleanly into Agentforce Life Sciences or Veeva Vault CRM.

1. Proof of pull test

What good looks like

AI is used consistently in daily workflows because it reduces friction in core field activities such as preparation, engagement, and follow-up. Evidence includes improved efficiency, strong user satisfaction, and increased high-value activity.

Proven signal

- +27% time savings in preparation and follow-up
- 85% user satisfaction
- Increased multichannel engagement activity

Why it matters

When AI creates pull, it anchors behavior and prevents adoption reset during CRM change.

2. CRM independence test

What good looks like

AI is not dependent on a single CRM platform and can operate where users work today, while transitioning seamlessly as CRM decisions and timelines evolve.

Proven signal

- AI is deployed within the current CRM and remains usable through migration85% user satisfaction
- User workflows remain consistent across CRM environments
- Integration supports transition into Agentforce Life Sciences or Veeva Vault CRM without rework

Why it matters

When AI is CRM-independent, user behavior remains stable even as the underlying platform changes, preventing adoption reset during coexistence.

3. Agentic value beyond CRM

What good looks like

AI delivers value by combining multiple agent capabilities and data sources, with the CRM acting only as the interface, not the primary source of insight.

Proven signal

- AI integrates inputs across multiple domains including CRM activity, sales performance, next best action logic, digital engagement signals, scientific and publication data, and event participation
- Recommendations are driven by combined agent outputs rather than a single CRM dataset
- Insights remain consistent and actionable even when CRM data is incomplete or evolving

Why it matters

During migration, CRM data is fragmented and unstable. AI that relies only on CRM breaks with it. AI that operates across multiple data sources and agents continues to deliver value, making CRM changes largely invisible to the user and preserving execution continuity

4. Trust and governance test

What good looks like

AI outputs are trusted and consistently used in live execution, supported by validation frameworks, governance, and compliance controls.

Proven signal

- High user confidence in AI-generated insights
- Consistent output quality across accuracy, relevance, and completeness
- Low rate of errors or revalidation by users

Why it matters

During migration, trust is fragile. Trusted AI stabilizes execution and reinforces adoption, while untrusted AI accelerates disengagement and workarounds.

CLIENT SPOTLIGHT

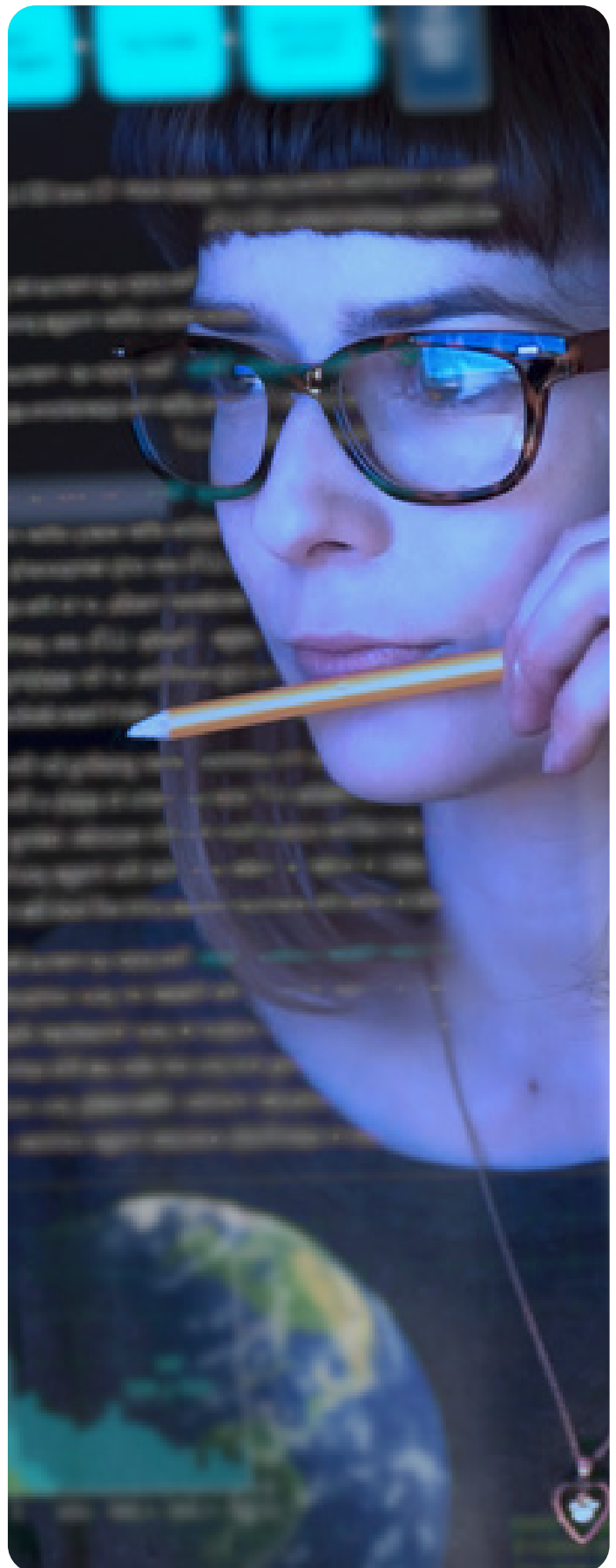
Decreased call preparation time by 27%

A specialty pharma company deployed an IQVIA AI field companion within its existing CRM to improve execution without disrupting workflows. Embedded into planning, engagement, and follow-up, the assistant reduced call preparation and follow-up time by 27 percent, achieved 85 percent user satisfaction, and increased multichannel engagement by more than 15 percent. More importantly, it became part of daily execution, with sustained use beyond initial rollout.

This outcome was driven by how the capability was designed. The assistant operated within existing workflows and combined CRM, sales, and external scientific data to maintain insight quality even when CRM data was incomplete. It functioned as a portable layer rather than being tied to a single system, allowing users to interact with a consistent execution experience as underlying platforms evolved.

This model becomes especially relevant as the organization prepares for CRM migration. Because the assistant is not dependent on a single platform, the transition can proceed without resetting user behavior. Field teams continue to operate through the same AI-driven workflows while the CRM platform changes underneath. As the organization moves to Agentforce Life Sciences, the experience is maintained through API-based agent actions, allowing the initial investment to carry forward while insight quality improves through broader data and compounds in the target environment.

This example shows what is required for AI to act as a continuity layer in CRM migration. Adoption is anchored in measurable productivity gains that sustain daily use. The capability remains independent of a single CRM platform and continues to function through system change. It delivers value by integrating data beyond CRM and is trusted in live execution. When these conditions hold, AI sustains execution through migration and reinforces adoption as the platform evolves.



What organizations should do now to reduce execution risk

As more organizations move toward migration at the same time, access to experienced delivery capacity will become increasingly constrained. Skill gaps are already shaping transformation timelines, with many programs delayed due to limitations in required technology and implementation capabilities. The primary decision is no longer when to migrate, but how to do so without disrupting execution.

Organizations should start by identifying the elements of their business that must remain stable throughout the transition, and then prove changes under real operating conditions before scaling. Partner selection becomes critical, requiring delivery models that operate seamlessly across design, build, and live execution rather than handing off between phases. Embedding AI into workflows early can further support adoption and continuity.

With demand converging toward 2029, organizations will increasingly compete for the same partners and capabilities. The priority is not to delay, but to define a clear execution model early:

- Identify what must remain stable
- Prove what will change before scaling
- Align partners to operate across the full lifecycle
- Treat AI as part of continuity, not a post-migration phase

These decisions shape whether the program can maintain performance while evolving.

The bottom line: Execution determines outcome

Reaching a future state is necessary, but it is no longer sufficient. This migration cycle is defined by the ability to evolve continuously without breaking execution.

Organizations that succeed manage change in line with how the business actually operates in practice. They maintain continuity across systems, validate performance in real conditions before scaling, and build adoption through consistent execution over time.

This is what separates programs that complete deployment from those that deliver sustained value.

As a result, partner selection becomes a critical determinant of success. Most can define a target state or accelerate initial deployment. Far fewer can sustain execution through extended periods of coexistence, where data, workflows, and user behavior must remain stable while systems continue to evolve.

IQVIA has repeatedly demonstrated this capability in live environments across complex life sciences CRM transformations, delivering programs that maintain execution continuity while systems, data, and workflows evolve in parallel at scale.

At the same time, IQVIA has successfully deployed agentic AI at scale, grounded in high-quality, multi-source data and validated for real-world field use. This enables AI to act as a true execution layer, improving decision-making, reinforcing behavior, and maintaining adoption even as underlying platforms change.

This combination allows organizations to decouple execution from platform change, preserving adoption and continuously delivering value throughout the migration. This is what determines whether organizations simply deliver a new system, or successfully transform how the business performs.

Organizations should act now to align with partners such as IQVIA, who have already proven this model in practice and can sustain execution through the full migration lifecycle.

About the author



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With more than 20 years of experience, Aleksandra brings practical expertise across the full life sciences CRM landscape, including customer engagement, CRM migration, data and integration, analytics, omnichannel orchestration, and AI-enabled execution.

Her work spans global commercial and medical environments, with hands-on experience across the operating conditions that shape real-world transformation, from pilot validation and coexistence to wave-based scale and adoption.

She has played a key role in redefining how field and KOL engagement are supported through integrated data, workflow, and AI-driven solutions, helping organizations move beyond platform-centric models toward execution that holds in practice.

Her perspective is grounded in direct experience of how CRM transformation unfolds in practice, including where it breaks, how execution degrades, and what is required to sustain it at scale.

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