Execution-First CRM Migration

How life sciences leaders can migrate CRM without compromising execution, data trust, or field adoption

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What this guide covers

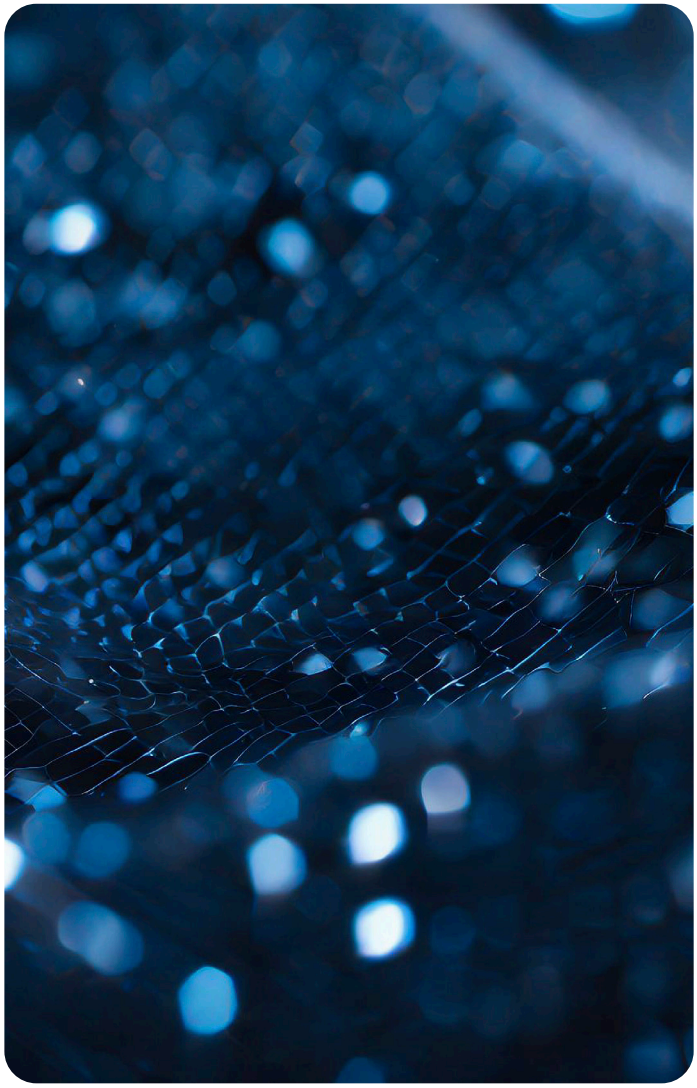
CRM migration in life sciences is often evaluated as a platform, implementation, or timeline decision. In practice, success is determined by whether commercial and medical execution remain stable as systems, data, and workflows change. This guide outlines an execution-first migration approach: one designed to help leaders protect execution continuity while moving from pilot to scale.

It is intended for commercial operations and commercial IT leaders assessing how to sequence CRM change, manage coexistence, and introduce AI in a way that supports adoption rather than disrupts it.

The guide focuses on four questions:

- Is this the right migration approach for our organization?
- How should migration be sequenced to reduce execution risk?
- What conditions should be validated before scaling?
- How can AI be introduced without adding instability?

By answering those questions, the document is designed to help leaders make better early decisions, not simply advocate for a platform or delivery philosophy.



Executive summary

Execution-first migration is an approach to CRM transformation that treats continuity of execution, not technical deployment, as the primary measure of success. It starts by defining the workflows, data dependencies, and decisions that cannot be disrupted. It then validates those conditions in a pilot, scales through controlled waves based on evidence, and establishes governance early enough to support stable long-term operation.

In this model, AI acts as a stabilizing execution layer, helping to maintain consistency in decision making and workflows even as systems and data evolve.

This approach is not necessary in every migration. It is most relevant when leaders are managing complex data and integration environments, multiple markets or business units, meaningful regulatory variation, or significant coexistence between legacy and target systems. In those settings, timeline-driven migration may appear faster at first but can defer complexity into post-go-live disruption. Execution-first migration usually takes a more disciplined path, but it reduces the risk of scaling behaviors, workflows, and data conditions that have not yet been proven in live use.

Indicative migration timelines by organization complexity

ORGANIZATION COMPLEXITY	TYPICAL CHARACTERISTICS	INDICATIVE DURATION TO COMPLETE MIGRATION
Small	Single region or limited markets, fewer integrations, narrower persona set	9 to 15 months
Medium	Multi-market rollout, moderate integration inventory, localized compliance variation	15 to 24 months
Large	Global footprint, multiple business units, high integration density, strong regulatory variance, wave-based scale	24 to 36 months

These ranges assume pilot-led validation and wave-based scaling. Timeline-driven cutover approaches may be shorter in duration but often introduce more execution risk during and after migration.

When an execution-first migration approach makes sense

Execution-first migration is generally the better fit when a CRM migration affects revenue-critical, field-critical, or medically sensitive workflows that cannot tolerate disruption. It is especially relevant when leaders are managing parallel systems during transition, reconciling data across multiple sources, or coordinating rollout across markets that differ in operating model, compliance requirements, or adoption readiness.

In these situations, the question is not only whether the new platform can be deployed, but whether the organization can continue to execute with confidence while change is underway.

Leaders should consider this model when any of the following conditions are present:

- Core commercial or medical workflows depend on stable data across systems
- Integrations are numerous or difficult to validate outside live use
- Adoption risk is high because teams already work under time pressure
- Coexistence between legacy and target systems will persist for a meaningful period
- AI is part of the future-state vision and must be introduced without resetting behavior

How execution-first migration works in practice

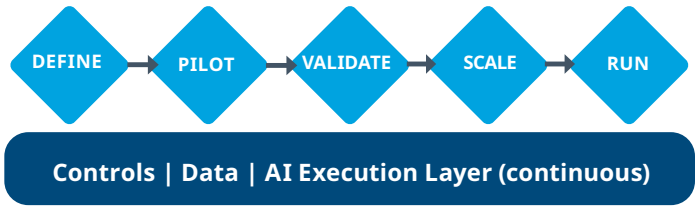
An execution-first migration follows a simple progression: define what must remain stable, validate it in pilot, scale through controlled waves, and build governance for steady-state evolution. The sequence matters because it prevents the organization from scaling unresolved issues.

Step 1: Define what cannot break
Start by identifying the workflows, data dependencies, and execution-critical processes that must remain reliable throughout migration. For commercial operations and IT leaders, this creates the practical constraints that should drive sequencing, readiness, and partner alignment. If those conditions are not clear at the outset, rollout decisions are more likely to be driven by build progress or calendar pressure rather than execution needs.

Step 2: Use pilot as an operational proof point
A pilot should confirm that users can complete live workflows with confidence, that data is trusted in day-to-day work, and that integrations hold under real timing and volume conditions. This is more than configuration testing. It is the point at which technical readiness becomes operational readiness.

Step 3: Scale only when proof exists
Controlled waves should expand only when the pilot demonstrates that execution conditions are holding. If users are relying on workarounds, verifying data outside the system, or reconciling reports across environments, the safer choice is to pause, resolve the issue, and proceed when the model is stable.

Step 4: Build governance before broad scale
Governance, design authority, release management, and ownership should be defined early, not after deployment. The point is not bureaucracy. It is to prevent local exceptions, fragmented ownership, and quietly diverging ways of working from undermining scale.



What leaders should validate before scaling

Before moving beyond pilot, leaders should be confident that the following conditions hold:

- Workflows hold in real use: users can complete critical tasks in the system without reverting to old tools or parallel processes
- Data is trusted enough to drive action: teams do not need to validate key records externally before acting
- Integrations perform reliably under live conditions: timing, dependencies, and reporting outputs remain consistent as usage scales
- Ownership is clear: Decision rights for scope, exceptions, data, workflows, and wave progression are understood and enforced
- Coexistence is manageable: Legacy and target environments can operate without creating conflicting reports, duplicate effort, or confusion for users

This is the practical decision lens: not whether the program is progressing on paper, but whether the operating model is holding well enough to scale responsibly.

What typically goes wrong and how to spot it early

CRM migration rarely fails because the design deck was weak. It usually falters when the operating model does not hold under real conditions. The clearest signs are behavioral drift, erosion of data trust, integration inconsistency, premature scaling, and fragmented ownership.

Common signals to watch for include:

- The system is technically live, but users still rely on excel, offline notes, or shadow tools
- Data exists in the system, but users check another source before acting
- Reporting requires recurring reconciliation across environments
- Issues from pilot are accepted and carried into the next wave
- Local teams create workarounds that are not reconciled centrally
- Adoption appears acceptable at go-live but weakens over time

These are not isolated operational annoyances. They are signs that migration may be moving faster than readiness. If these conditions are emerging, the more strategic question is whether the organization is scaling a platform or preserving an execution model.

Common execution risks

PATTERN	WHAT HAPPENS	IMPACT
BEHAVIOR DRIFT	users workaround	adoption drops
DATA DISTRUST	verification outside system	decision breakdown
INTEGRATION INSTABILITY	inconsistent data	reporting conflict
EARLY SCALING	issues amplify	rework
OWNERSHIP FRAGMENTATION	local fixes	divergence

How AI can support migration without increasing risk

AI can be useful during CRM migration, but only when introduced with the same discipline as the migration itself. In an execution-first model, AI should support workflows that are already stable and repeatable. Good early use cases include pre-call preparation, post-call documentation, summarization, and next-best-action support embedded into existing ways of working.

In those situations, AI can reduce effort and reinforce consistency during change. The risk comes when AI is introduced before the underlying conditions are reliable. If workflows vary by market, if data sources conflict, or if users already question system outputs, AI can amplify those inconsistencies rather than resolve them.

A useful executive test is simple: if users still need to verify the underlying data or question the logic behind recommendations, the model is not yet stable enough for AI to scale cleanly.

How IQVIA supports execution-first CRM migration

Execution-first CRM migration requires more than implementation capability. It requires operating through coexistence, managing data and integration complexity as part of live execution, and introducing AI in ways that support adoption rather than layer on change.

IQVIA's approach is differentiated by treating execution continuity as a delivery condition, using broader data foundations to support decision-making during migration, managing legacy and target environments as one operating reality, and embedding AI into repeatable workflows rather than delaying it as a separate phase.

Typical model vs. IQVIA approach

CAPABILITY	TYPICAL MODEL	IQVIA APPROACH
Delivery	phased	continuous
Data	post-migration	active during migration
AI	later	embedded
Ownership	fragmented	end-to-end

For commercial operations and commercial IT leaders, the question is not simply how to move from one CRM platform to another. It is how to do so without compromising the workflows, data trust, and operating discipline that commercial execution depends on. Execution-first migration is not the only model, but in complex life sciences environments it is often the more resilient one. It gives leaders a practical way to reduce risk, learn under real conditions, and scale with greater confidence. IQVIA is well suited to this model because the approach aligns with the way the organization already works across data, delivery, coexistence, and AI.

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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