ROADMAP TO VAULT CRM MIGRATION

Veeva has announced the transition of its CRM application from the Salesforce platform to the Veeva Vault platform. This decision has taken the life sciences industry by surprise, as no pharma clients were anticipating a CRM change at this time. Consequently, all Veeva CRM clients must now migrate to the Vault platform or another CRM option, such as Salesforce Life Science Cloud. Regardless of the platform preference, this migration is inevitable. This paper aims to guide pharma customers through the migration process, offering strategies to make the transition as smooth and painless as possible.

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Target Audience:

This paper is intended for technical professionals and decision-makers involved in CRM system architecture and migration strategies, particularly those familiar with Veeva CRM on Salesforce. It is specifically targeted at:

- **Technical Architects and Engineers:** Those who have in-depth knowledge of Veeva CRM's structure and deployment on Salesforce and are responsible for designing and executing migration strategies to Veeva Vault.

- **CRM Administrators and Developers:** Professionals involved in configuring and customizing CRM systems who need to understand the implications of migrating from Salesforce to Vault, particularly regarding integration and data management.

- **IT Managers and Project Leads:** Individuals who oversee CRM and content management systems and are interested in understanding the technical steps and considerations for a successful migration.

This document assumes familiarity with Salesforce architecture, Veeva CRM functionality, and related technical processes, as it will focus on the intricacies of the migration to Veeva Vault rather than basic CRM concepts.

Initially, Veeva built its core CRM product on the Salesforce platform to leverage its robust features and provide a reliable base for pharmaceutical clients. However, as the needs of these clients have evolved, Veeva CRM's reliance on the Salesforce platform has presented challenges that require a strategic shift. Consequently, Veeva CRM has decided to migrate to the Vault CRM platform. This transition aims to address existing issues, streamline operations, and leverage Vault CRM's unique capabilities to better meet organizational needs and client expectations. Veeva will discontinue its CRM product on Salesforce by 2030. Pharma companies currently relying on Veeva CRM will have to assess all possible options to select a new CRM platform that can support their current operation along with the capability to further expand their business and ensure minimal disruption to services and maintain data integrity while achieving the desired enhancements in functionality and performance.
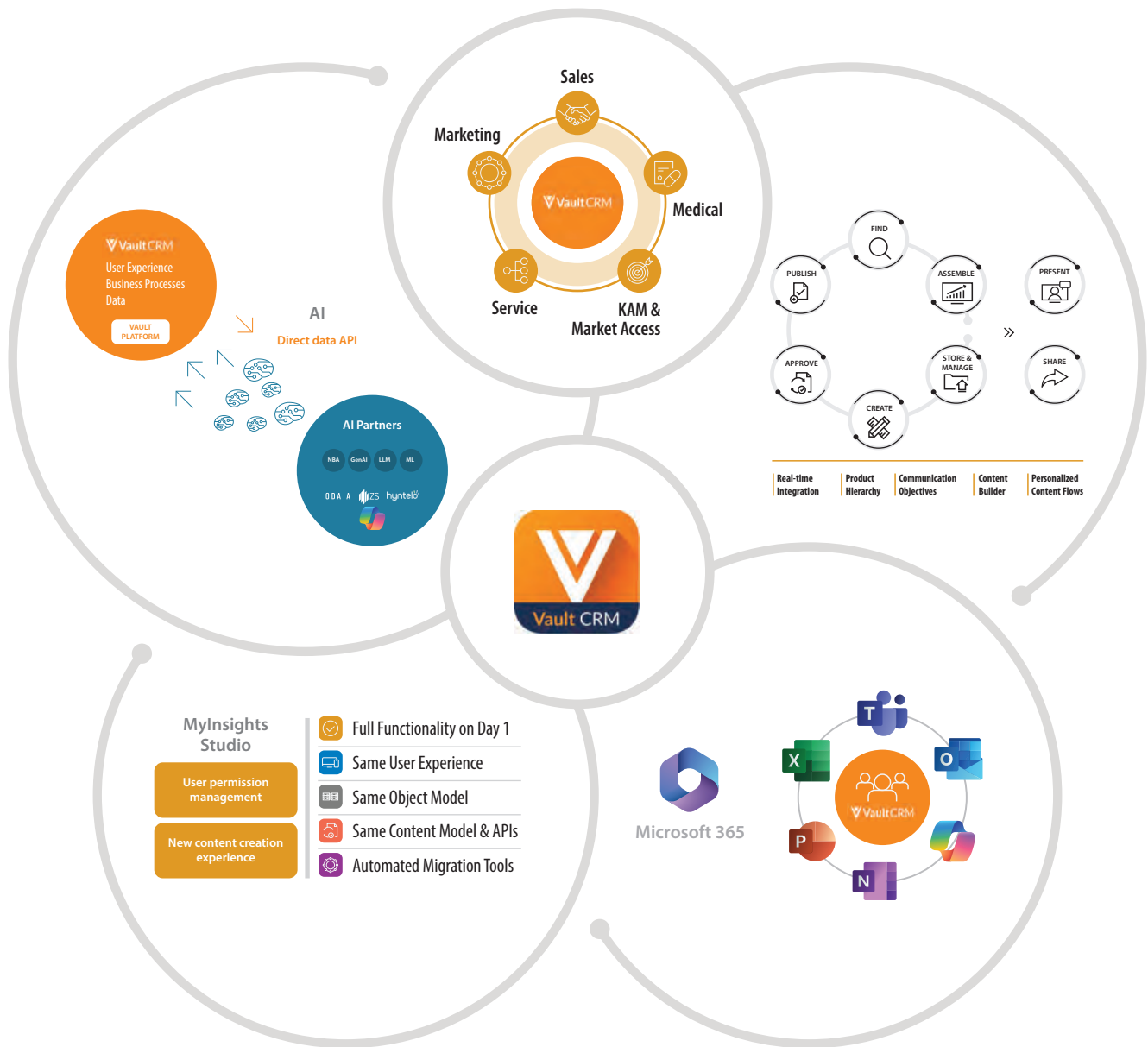
1.1 Pros for migrating to Veeva Vault:

Although the migration of Veeva CRM to Vault was not the first choice for many pharma clients, it may present an unexpected opportunity. Vault CRM brings distinct advantages over the current CRM system, potentially offsetting the migration costs for businesses.

- **AI Integration:** Vault CRM offers seamless collaboration with Microsoft Co-Pilot to deliver built-in Gen AI capabilities. These features enhance sales reps' ability to engage with potential customers more effectively. Unlike other solutions, AI is embedded in the core of the CRM, sparing pharma clients the expense of developing their own AI-driven systems.

- **Microsoft 365 Integration:** Vault CRM includes native integration with Microsoft 365 tools like PowerPoint,
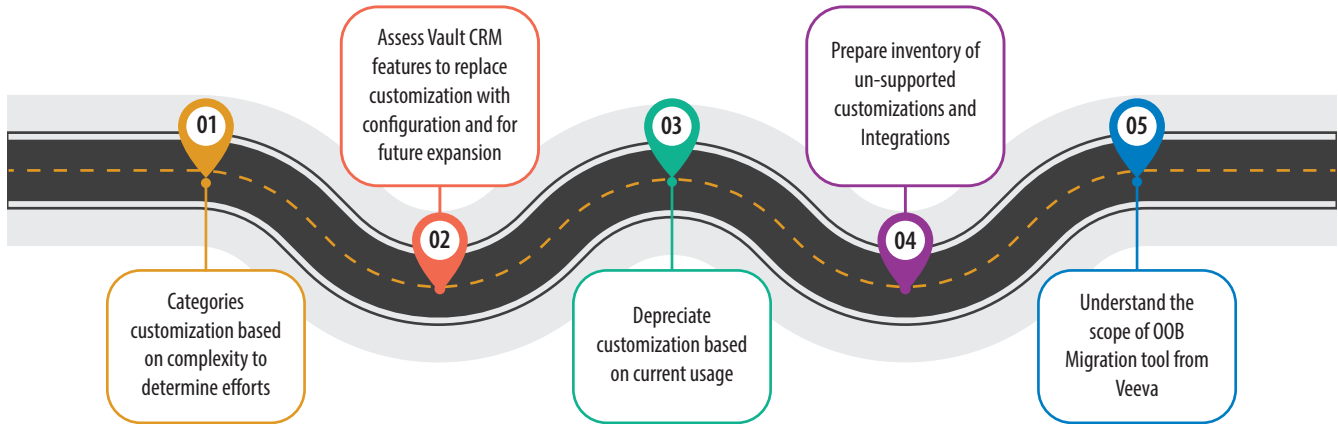
Excel, Teams, and OneNote. This integration empowers sales representatives to navigate between CRM and collaboration tools with ease, enhancing productivity and workflow efficiency.

- **Unified and Connected Product Life Cycle:** Vault CRM is designed to unify clinical and commercial data, generating more comprehensive customer profiles. It also extends support to Marketing and Sales, along with Medical Interactions, all within the same customer base.

- **Content Supply Chain:** Vault CRM enables a more powerful content management system, offering a robust and reliable platform for content creation and sharing. This allows clients to design, approve, search for, and present content all within the same system, facilitating personalized and cohesive communications.

- **MyInsight Studio:** MyInsight Studio is tightly integrated with Vault CRM, providing an easy-to-use UX for businesses. This integration allows users to create custom MyInsight dashboards, test them, and deploy them—all within the same platform.

2. How to prepare for Vault Migration:

01 Categories customization based on complexity to determine efforts

02 Assess Vault CRM features to replace customization with configuration and for future expansion

03 Depreciate customization based on current usage

04 Prepare inventory of un-supported customizations and Integrations

05 Understand the scope of OOB Migration tool from Veeva

2.1 Scope of out of Box migration supported by Veeva:

Veeva is working on a migrator tool that will auto migrate most of the components from Salesforce org into Vault CRM platform with minimum intervention required from clients. Below is the list of Salesforce components that are currently supported in migrator tool from Veeva.

Salesforce Components	OOB migration
Custom Metadata	Yes
Custom Object	Yes
Custom Setting	Yes
Flows	Yes
Formula / Roll Up Summary / External ID Fields	Yes
Global Picklist	Yes
Lightning & Classic Apps	Yes
Page layouts/Search Layouts/Lookup Layout	Yes
Permission set	Yes
Process Builder	Yes
Public Groups	Yes
Record Types	Yes
Security Profile	Yes
Tabs	Yes
Territory Type / Model	Yes
Validation Rules	Yes

Workflow	Yes
Apex Class	No
App Exchange / 3rd Party Apps	No
Approval Process	No
Audit Trail/ Field Tracking	No
Connected Apps	No
Custom Label	No
Dashboard	No
Email Alerts & Notifications	No
Email Service (Inbound / outbound)	No
Email Templates	No
Lightning & AURA Components	No
Links & Buttons / Actions	No
Platform Events	No
Remote Sites/ Public Sites	No
Report Types	No
Reports	No
Sharing Rules	No
Triggers	No
Visual Force Page	No

2.2 Prepare an inventory of the current non- supported configuration:

Run below queries to prepare an inventory of the current configuration and customization that are not going to be supported in the migration tool from Veeva.

Salesforce Components	OOB Migrated?	How to prepare inventory
Apex Class	No	Run query in production orgs to fetch all the custom apex classes that are not part of any Managed package including Veeva CRM package, Review the class names to exclude any classes created by unmanaged package or Veeva OOB but not having vod in the name.
App Exchange / 3rd Party Apps	No	Run query in production orgs to fetch all Apps that are installed from app exchange or created within.
Approval Process	No	Run query in production orgs to fetch all Approval process details
Audit Trail/ Field Tracking	No	All fields are automatically tracked when enabled at the object level. History objects are exported and delivered as CSVs, but cannot be migrated to Vault CRM platform
Connected Apps	No	Run query in production orgs to fetch list of all Connected applications

Custom Label	No	Run query after enabling Tooling API to fetch all the list of custom labels
Dashboard	No	Run query to fetch list of all the Dashboard, and query to identify the Report components in each of the dashboards
Email Alerts & Notifications	No	Run query to fetch list of all workflow email alerts
Email Service (Inbound / outbound)	No	Run query to fetch list of all active email services, and query to fetch domain address details
Email Templates	No	Run query to fetch list of all the email templates
Lightning & AURA Components	No	Run query to fetch Lightning LWC Component and Aura components directly from production org.
Links & Buttons / Actions	No	Export the Meta data api for the object definition to extract details of custom links/buttons/actions defined for each object.
Platform Events	No	Navigate to Setup --> Integrations --> Platform Events to fetch list of all platform events configured in a production org.
Remote Sites/ Public Sites	No	Run query to fetch list of all Remote Sites:
Report Types	No	Run REST API call to fetch list of all report types:
Reports	No	Run query to fetch list of all Reports created in production org:
Sharing Rules	No	Use Metadata API to fetch list of sharing rules
Triggers	No	Run query to fetch list of all active trigger running in production org:
Visual Force Page	No	Run query to fetch list of all Visual Force Page:

2.3 Prepare inventory of integrations:

Integration inventory must be prepared by looking into all the inbound and outbound integration from salesforce org.

2.4 Depreciate customization based on current usage:

Below guideline can be used to identify customizations that were created for some requirement back in days but are no longer used/required and can be depreciated without impact to end users.

Salesforce Components	Usage Metrics
Apex Class	Navigate to Setup -> Security -> Event Monitoring -> Event log File Browser and extract the file for the Apex Execution to get the list of all the apex class execution log for upto last 1 year.
Triggers	Query the latest date when a record of given object was created/updated to identify if the associated trigger is still in use. A deep dive in the trigger logic might be required to further analyze if the trigger is still executing valid business requirements
Visual Force Page	Run query to check if a given Visual force page was last accessed withing 90 days or not. Veeva Product team can query logs in the backend that show the Visual force page access for upto 3 years.
Approval Process	Run query to check the last running instance of the approval process:
Dashboard	Run query to fetch the last View/Reference date for a given dashboard and probably retire Dashboard that is not used in last 1 year.
Reports	Run query to identify last run date for a given report and probably retire reports that are not run in last 1 year
Email Alerts & Notifications	Navigate to Setup -> Environments -> Logs -> Email Log Files to run a report on the email notification that are send out from Salesforce in last 30 days
Platform Events	Run query to fetch report of all Platform events that are actively publishing data in last 45 days

2.5 Assess customization to replace with OOB configuration features:

Review existing customization that are still used by business and explore Vault CRM component repository [1] from below link to assess if any of the current customization can be replaced with a OOB configuration component in the new Vault CRM platform. This will reduce tech debt on the new platform and will help in better support from Veeva product team.

Some examples of customizations that can be replaced by Vault CRM latest features are:
- Remote Signature Capture for Sample/Consent
- Recommended Emails for Events and Campaign
- WhatsApp & SMS approved messaging
- Adding QR codes to Print Invitation Templates in Events
- Attendee Self-Registration with Events
- Remote Detailing using Teams and Zoom meetings

2.6 Categorized customization based on Complexity:

Custom components like Apex class/trigger/Visual Force page can be further categorized based on complexity to determine the total effort for migrating this component. Multiple tools/apps are available in market that can help with scanning the complexity of apex code using different algorithms, one such recommended tool from Salesforce is PMD Code Analyzer Engine. Output of this analysis will be a cognitive complexity number defined to each apex class and trigger that can be used to determine if the apex code is Simple/Medium/Complex.

One the code category has been defined, below matrix can be used to identify the total efforts needed to migrate the customization from Salesforce to Vault.

Salesforce PMD tool [2] help to identify Cognitive and Cyclomatic complexity with below logic:

Cognitive Complexity:

Cognitive complexity is a measure of how difficult it is for humans to read and understand a method. Code that contains a break in the control flow is more complex, whereas the use of language shorthand's doesn't increase the level of complexity. Nested control flows can make a method more difficult to understand, with each additional nesting of the control flow leading to an increase in cognitive complexity. The complexity of methods directly affects maintenance costs and readability. Concentrating too much decisional logic in a single method makes its behavior hard to read and change.

Cyclomatic complexity:

Cyclomatic complexity assesses the complexity of a method by counting the number of decision points in a method, plus one for the method entry. Decision points are places where the control flow jumps to another place in the program. As such, they include all control flow statements, such as 'if', 'while', 'for', and 'case'. classes with many methods of moderate complexity get reported as well once the total of their methods' complexities reaches 40, even if none of the methods was directly reported.

Range for Cognitive Complexity:	Range for Cyclomatic Complexity:
🟩 0-200 → Simple	🟩 1-4 → Simple
🟧 200-500 → Medium	🟧 5 - 7 → Medium
🟥 Above 500 → complex	🟧 8 - 10 → complex
	🟥 11+ → Very complex

Customization Efforts Range (In hrs)	
🟢 LOW	< 8
🟠 MEDIUM	8 – 16
🔴 HIGH	> 16

2.6.1 Estimated Efforts for migrating (re-writing) Salesforce customization into Vault CRM

Features	Efforts (In hrs) Simple	Efforts (In hrs) Medium	Efforts (In hrs) Complex
Apex Class (job, Service)	MEDIUM	HIGH	HIGH
Approval Process	LOW	MEDIUM	MEDIUM
Connected Apps	LOW	LOW	LOW
Custom Label	LOW	LOW	LOW
Dashboards	LOW	MEDIUM	HIGH
Email Alerts & Notifications	LOW	MEDIUM	HIGH
Email Service (Inbound)	LOW	MEDIUM	HIGH
Email Templates	LOW	LOW	LOW
Links & Buttons / Actions	LOW	LOW	MEDIUM
Platform Events	MEDIUM	HIGH	HIGH
Report Types	LOW	LOW	LOW
Reports	LOW	LOW	MEDIUM
Sharing Rules	LOW	LOW	LOW
Triggers	MEDIUM	MEDIUM	HIGH

2.7 Data Migration:

CRM data can be broadly categories into below 2 categories:

2.6.1 Veeva Object Data: Veeva Vault data model is designed like Veeva CRM to keep the data migration simple for OOB objects, Data that is stored in Veeva provided VOD objects will be migrated as is by migrator tool without any intervention needed from customers.

2.6.2 Custom Object Data: Custom object data that is created by customers can also be migrated using Veeva migrator tool but will need a little intervention from customers to identify the custom object and fields that needs to be migrated to new Vault platform along with the data residing in them.

2.8 Deployment Strategy:

Vault currently supports below deployment options that can be levered by customers to design a release management strategy.

2.8.1 Pre-Production Vaults: Pre-production vaults allow your organization to fully manage a vault's lifecycle from initial to go-live. When ready, Vault Admins can promote the pre-production vault to a production vault from Admin > Deployment > Sandbox Vaults.

2.8.2 Vault Package: Create a VPK with your source files -> Import the VPK to Vault -> Deploy the VPK

2.8.3 Maven Plugin Goals [3]: This Maven plugin provides a set of easy-to-use commands that allow you to package, validate, import, and deploy Vault Java SDK source code by using defined Maven goals

2.8.4 MDL: Use MDL (Metadata Definition Language) to manage Vault configuration. Like DDL (Data Definition Language) in databases, you can use MDL to create, describe (read), update, and drop (delete) Vault components that make up its configuration.

2.9 Organizational Structure for Veeva Vault:

For optimal management of Veeva Vault, the following organizational structure is proposed:

A company utilizing Veeva Vault should implement a multi-domain setup, with each domain containing one or more Vaults [4]. A domain housing multiple Vaults is commonly referred to as a "multi-Vault domain." This configuration allows seamless switching between Vaults within the same domain without requiring additional logins, provided the user has the necessary access to both Vaults.

In a typical arrangement, a company maintains one domain for all production Vaults and a separate domain for sandbox or training Vaults. The domain is represented in the user's Vault username as everything following the "@" symbol (e.g., tibanez@veevapharm.com belongs to the veevapharm.com domain). When a user is created, they are stored at the domain level, with access granted to specific Vaults within that domain. If an attempt is made to create the same user on a different Vault within the same domain, Vault prompts the administrator to add the pre-existing user. Key security features, such as login policies, network access rules, and single sign-on settings, are also defined at the domain level and applied consistently across all Vaults within that domain.

The preferred structure for Veeva Vault consists of a **Global Data Vault (GDV)** at the core, which holds all standard configurations and global deployments applicable across all markets. In addition to the GDV, there should be regional Vaults, each containing the markets within the same geographic region.

Core configurations and enhancements are developed and deployed centrally in the GDV. Once validated, these changes are migrated to the respective regional Vaults. This approach ensures that global standards are maintained across all regions while allowing for region-specific configurations in individual regional Vaults. These additional configurations are necessary to comply with local regulations and market-specific requirements, offering both flexibility and control within the system.

By centralizing core configurations in the GDV and delegating market-specific adjustments to regional Vaults, this structure promotes efficient scaling, streamlined governance, and enhanced compliance management across diverse geographic regions.

3.0 Conclusion

Here are top 5 Reasons to Migrate to the Veeva Vault Platform:

1. Seamless Transition for End Users – No Additional Training Required

One of the key advantages of migrating to Vault CRM is its familiar user interface, closely mirroring the current Veeva CRM. This eliminates the need for re-training the sales force, ensuring that field representatives can begin using the new system immediately without disrupting their daily operations.

2. Integrated AI Capabilities

Vault CRM includes built-in AI functionality through Microsoft Co-Pilot, enabling companies to provide generative AI support to their users without requiring external integrations. This feature enhances productivity and intelligence within the CRM, offering advanced tools to optimize customer engagement.

3. Enhanced Interaction Channels

Vault CRM supports advanced communication channels, including approved integrations with WhatsApp and SMS, allowing sales representatives to reach healthcare professionals (HCPs) more quickly and conveniently. This feature offers faster, more effective ways to connect with clients in compliance with industry regulations.

4. Unified Clinical, Medical, and Commercial Collaboration

Many pharmaceutical companies already use the Veeva Vault platform for managing clinical data in their R&D divisions. By bringing CRM into the same Vault ecosystem, companies can leverage a shared customer database across clinical, medical, and commercial divisions, fostering stronger synergy and collaboration between these functions.

5. Streamlined Content Lifecycle Management

With the integration of content management (such as Approved Email, CLM, and Event Materials) within the same Vault platform (Promo mats) as the CRM, users gain real-time synchronization and a feedback loop for content usage. This gives sales representatives greater control over how they tailor and deliver content, resulting in more targeted and effective customer engagement strategies.

References:

1. Vault CRM Help

https://vaultcrmhelp.veeva.com/doc/Content/CRM_topics/Accounts/AcctConfig.htm

2. Salesforce PMD tool

https://developer.salesforce.com/docs/platform/salesforce-code-analyzer/guide/pmd-engine.html

3. Vault Developer Portal

https://developer.veevavault.com/sdk/#deploying-code

https://github.com/veeva/vaultjavasdk-maven-plugin

4. Vault Platform Help

https://developer.veevavault.com/sdk/#deploying-code

Curious for a more in-depth discussion on your Veeva CRM to Vault migration? Reach out to our team of experts!

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