VEEVA CRM
AUDIT & GOVERNANCE

WHITE PAPER

Strengthening CRM Governance and Commercial
Operations at a Global Biopharmaceutical Company

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Big Picture Overview

A leading global biopharmaceutical company engaged Sierra Solutions Group to strengthen oversight and performance within its Veeva CRM commercial technology ecosystem. The partnership supported an internal audit, governance improvements, and operational enhancements aimed at optimizing how commercial teams engage with healthcare providers and organizations. Leveraging Veeva CRM as an enterprise platform, the engagement spanned multiple initiatives—from refining data management and operational documentation to supporting CRM enhancements that align with the needs of diverse therapeutic franchises. Together, these efforts provided the organization with clearer governance structures, improved operational efficiency, and a more reliable foundation for commercial execution.

The Situation

A leading global biopharmaceutical organization utilizes Veeva CRM as the foundational architecture for its commercial operations and healthcare provider (HCP) engagement. Recognizing the platform's technical and strategic complexity, leadership initiated a comprehensive governance audit to ensure data integrity, regulatory compliance, and cross-functional efficiency. By partnering with Sierra Solutions Group, the organization implemented advanced business analysis and project management frameworks to modernize its CRM ecosystem and align its digital operations with long-term commercial objectives.

The Challenge

As the organization's commercial footprint expanded, leadership identified a critical need for enhanced transparency across the CRM ecosystem. This initiative sought to address several core operational challenges:

- Technical Validation: Determining if current CRM configurations remained synchronized with evolving business requirements.
- Data Integrity: Auditing reporting tools and dashboards to ensure they provide an accurate, real-time reflection of operational data.
- Compliance & Standardization: Verifying that system processes and internal documentation adhere to stringent regulatory and corporate expectations.
- Master Data Management (MDM): Establishing a robust framework for managing healthcare provider (HCP) and organization (HCO) data across the enterprise platform.

Furthermore, the organization required expert project leadership to synchronize disparate CRM initiatives, ensuring seamless alignment between Commercial IT, compliance departments, and key business stakeholders.

Our Approach

Sierra Solutions Group collaborated with the Commercial IT organization to conduct a high-fidelity assessment of the CRM environment, establishing a more resilient governance framework. This engagement was structured across four strategic workstreams designed to bridge technical gaps and accelerate platform enhancements, ensuring the CRM architecture fully supports evolving commercial demands and regulatory standards.

- CRM Internal Audit and System Review
- Business Process and Compliance Documentation
- Customer Master Data Improvement Initiative
- Platform Enhancements and User Enablement

Framework for Operational Excellence

CRM Internal Audit and System Review

Sierra Solutions Group conducted a rigorous evaluation of the Veeva CRM environment to determine platform efficacy in supporting global commercial operations. The audit focused on:

- Technical Architecture: Analyzing system configurations and core platform functionality.
- Data Visualization: Reviewing the accuracy and utility of reporting tools and dashboards.
- Hardware Integration: Assessing the device environments used by field teams for optimal performance.
- Strategic Alignment: Evaluating the synergy between system capabilities and overarching business requirements.

This assessment provided leadership with actionable insights into system performance, identifying key opportunities for operational optimization and technical enhancement.

Business Process and Compliance Documentation

To ensure long-term operational consistency and regulatory alignment, Sierra Solutions Group developed a comprehensive documentation framework for the CRM environment. This workstream focused on codifying tribal knowledge into formal assets, including:

- Requirements Definition: Capturing and validating complex business needs from cross-functional commercial stakeholders.
- Process Engineering: Mapping end-to-end workflows to standardize CRM usage across different therapeutic franchises.
- Technical Translation: Converting business and compliance mandates into actionable technical specifications for system configuration.
- Governance Standardization: Authoring Standard Operating Procedures (SOPs) to provide a sustainable foundation for ongoing CRM oversight.

These deliverables bridged the gap between functional intent and technical execution, significantly mitigating compliance risks within the commercial technology landscape.

Customer Master Data Improvement Initiative

Sierra Solutions Group spearheaded a strategic initiative to optimize the management of Healthcare Organization (HCO) and Healthcare Provider (HCP) master data. Recognizing that data accuracy is the bedrock of commercial effectiveness, this workstream focused on enhancing the reliability of account addresses and governance protocols through:

- Stakeholder Orchestration: Coordinating alignment between Commercial Operations, IT, and Data Stewards to unify disparate data objectives.
- Process Optimization: Defining rigorous requirements to streamline address management workflows and reduce data decay.
- Governance Framework Development: Establishing sustainable policies for master data maintenance to ensure long-term platform integrity.
- Quality Assurance: Implementing validation checks to guarantee that customer information remains an "accurate source of truth" for field engagement.

By reinforcing the master data architecture, the organization achieved higher precision in its targeting efforts and strengthened its overall compliance posture.

Platform Enhancements and User Enablement

Beyond foundational governance, Sierra Solutions Group executed a series of tactical enhancements to optimize the end-user experience and drive platform adoption. This workstream ensured that system upgrades translated into tangible field effectiveness through:

- Curated Learning Solutions: Developing comprehensive Veeva CRM training assets tailored to specific commercial user roles.
- Actionable Intelligence: Engineering custom CRM dashboards to provide leadership and field teams with real-time operational visibility.
- Technical Rigor: Leading systematic testing and validation activities to ensure platform stability during feature deployments.
- Operational Codification: Documenting end-to-end lifecycle procedures to provide a sustainable manual for ongoing platform management.

These initiatives bridged the gap between technical deployment and functional proficiency, ensuring that commercial teams could fully leverage the enhanced CRM ecosystem to drive engagement.

The Facts

Record Accuracy Rate Improvement

8%

POST-OPTIMIZATION ACCURACY FOR HCP/HCO MASTER DATA ACROSS THE ENTERPRISE

Workstream Alignment

4 CORE

INTEGRATED WORKSTREAMS ESTABLISHED TO BRIDGE TECHNICAL GAPS AND COMMERCIAL REQUIREMENTS

Field Force Readiness

100%

GLOBAL COMMERCIAL TEAMS SUCCESSFULLY ONBOARDED THROUGH ROLE-SPECIFIC TRAINING ASSETS

Strategic Impact & Business Value Delivery

The implementation of a robust governance framework and the optimization of customer master data have transitioned the CRM from a tactical tool into a strategic asset. By aligning technical architecture with commercial intent, the organization has mitigated compliance risks, enhanced data transparency, and established a scalable foundation for future therapeutic launches.

Business Impact

Strengthened CRM Governance

The comprehensive internal audit provided leadership with granular visibility into the platform's operational environment. By codifying governance practices, the organization established a clear line of sight between technical configurations and global compliance standards, ensuring long-term system integrity.

Enhanced Customer Master Data Management

The HCP/HCO address management initiative established a robust governance framework for customer data. By reconciling disparate records, the organization achieved a 'single source of truth' across the CRM platform, significantly increasing targeting precision and data reliability.

Improved Documentation and Compliance Alignment

The development of a comprehensive documentation library and Standard Operating Procedures (SOPs) has standardized workflows across the CRM environment. This initiative ensures that all commercial technology operations are executed with consistent precision and full regulatory alignment.

Improved Operational Visibility for Commercial Teams

The implementation of custom executive dashboards and advanced reporting tools has provided leadership with real-time visibility into field activities. This enhanced transparency allows for data-driven decision-making and more agile adjustments to commercial strategies.

The Result

Through its strategic partnership with Sierra Solutions, the organization has successfully transformed its Veeva CRM environment into a high-performance commercial asset. By institutionalizing rigorous governance, codifying complex operational processes, and optimizing customer master data, the team has achieved a strong state of technical readiness. This engagement ensures that the commercial technology ecosystem is not only aligned with current business requirements but is also architected to scale alongside the organization's evolving therapeutic portfolio.

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