



PROJECT SPOTLIGHT

Veeva CRM Audit & Governance

EXECUTIVE SUMMARY

Effective commercial operations depend on a CRM environment that is both compliant and data-accurate. As business requirements evolve, legacy configurations and fragmented HCP/HCO data can create significant visibility gaps and regulatory risks.

Sierra partnered with a global biopharmaceutical client to conduct a comprehensive audit and governance overhaul of their Veeva CRM platform. By documenting key SOPs, unifying master data management, and deploying custom dashboards, Sierra established a high-integrity foundation that ensures operational consistency, audit readiness, and enhanced field engagement.

CHALLENGE



- CRM Misalignment: Configuration no longer supports current business needs.
- Reporting Inaccuracy: Dashboards fail to reflect real-time operational data.
- Compliance Gaps: Documentation and processes fall short of audit standards.
- Data Fragmentation: No unified strategy for HCP and HCO address management.
- Integrity Risks: Critical data quality issues across the platform ecosystem.

STRATEGIC RESPONSE



- Comprehensive CRM Audit & Configuration Review
- Operational Dashboard Creation & Visibility Tools
- SOP Development & Compliance Documentation
- Unified HCP/HCO Master Data Governance
- Cross-functional Stakeholder & IT Coordination

BUSINESS IMPACT



- Actionable Governance: Clear leadership visibility into platform operations.
- Consistent Compliance: Audit-ready SOPs and standardized workflows.
- Trusted Data: Improved HCP/HCO address accuracy across the platform.
- Operational Insight: Real-time visibility into customer engagement via dashboards.
- Enterprise Scale: A governed foundation built for future commercial growth.

DRIVING CRM GOVERNANCE, COMPLIANCE, AND OPERATIONAL EXCELLENCE



WHY SIERRA SOLUTIONS

Organizations partner with Sierra to strengthen governance and streamline operational processes across the CRM ecosystem. We ensure commercial platforms remain aligned with evolving business needs while supporting the high-stakes demands of field teams—delivering a compliant, reliable, and future-ready environment.



SIERRA
SOLUTIONS

| sierrasolutionsgroup.com