Market Guide for CRM in Life Sciences

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Initiatives: Healthcare and Life Science Digital Optimization and Modernization

> CRM technologies must continue to adapt to customer demands for personalization, while improving business outcomes in a hybrid environment. Life science CIOs should use this Market Guide in identifying and deploying CRM solutions to increase their business effectiveness and agility.

Overview

Key Findings

- The traditional definition of CRM in life sciences has been synonymous with sales force automation platforms. This definition needs to expand and encompass customer service and marketing automation tools to effectively orchestrate customers' journeys across multiple interaction points.

- Life science organizations find it difficult to adopt new digital engagement channels, such as direct messaging and seamless videoconferencing, due to hardened business processes and monolithic systems.

- Healthcare provider (HCP) expectations have shifted, with many finding digital information delivery to be more effective and increasingly preferable.

- Predictive analytics tools for field teams continue to gain prominence, but are offered through stand-alone applications or isolated CRM modules, rather than being incorporated in users' natural workflow.

- Life science organizations with global commercial operations face increasing challenges and risks arising from a combination of security, privacy and data residency regulations. These include California Consumer Privacy Act (CCPA) and California Privacy Rights Act (CPRA), EU's General Data Protection Regulation (GDPR), and China's Personal Information Protection Law (PIPL).

Recommendations

Life science CIOs advancing healthcare and life science digital optimization and modernization in pharmaceutical, biotechnology, medical device and diagnostics segments should:

- Partner with sales and marketing business leaders to identify CRM solutions that meet their business goals to support a customer-centric engagement model and ensure the field force's effectiveness. Ensure that prospective solutions can seamlessly integrate with other customer engagement systems, such as customer service and marketing execution hubs.

- Invest in foundational capabilities that enable the organization to orchestrate customer journeys by creating a way to connect data points via necessary technologies, such as APIs and integration capabilities.

- Create more-seamless customer and field representative experiences by establishing fusion teams and utilizing hyperautomation technologies to break down divisional silos and fragmented processes.

- Evaluate the strength of each vendor's partner ecosystem to support additional capabilities for the organization by seeking those with advanced artificial intelligence (AI) capabilities.

- Proactively evaluate and manage the risks of data privacy, security and cross-border data transfers to give the organization flexibility and avoid incurring costs and reputational damage.

Market Definition

CRM Is a Critical Tool for Streamlining Customer Engagement

Gartner defines "CRM" as technologies or systems that enable a broader customer engagement business strategy. These systems span four major areas — sales, marketing, digital commerce, and customer service and support.

Yet in the life science industry (that is pharmaceutical, biotechnology, medical device and diagnostics organizations), CRM is synonymous with sales and field enablement systems, given their heavy reliance on a field-force-driven engagement model. These systems support the automation of sales activities and expert engagement for organizations' sales professionals, key account managers, medical experts and field service personnel. These systems are also central to sales and medical teams responsible for raising therapeutic awareness, delivering educational content and influencing demand, as well as nurturing contracts with HCPs, healthcare organizations (HCOs) and other medical stakeholders. In addition, these systems provide servicing as a system of record and maintaining compliance with jurisdictional regulations for capabilities such as planning, enablement, execution and analysis processes.

This Market Guide focuses on the sales CRM systems specific to the life science industry as they are heavily customized to meet industry needs. Other customer engagement systems are covered in appropriate Gartner Magic Quadrants (see Magic Quadrant for B2B Marketing Automation Platforms, Magic Quadrant for Contact Center as a Service and Magic Quadrant for Digital Commerce).

Market Description

Automation of Core Sales Processes Is Foundational to CRM and Advanced Platforms to Enable AI-Based Intelligence

The life science CRM market comprises vendors providing diverse tools and services that enable field representatives to efficiently and effectively engage with customers to inform buying, prescribing or utilizing decisions for a therapeutic drug or medical device product. The field representatives include sales representatives, digital and inside sales representatives, medical science liaisons, key account managers, and medical device service and support representatives.

Since life science organizations (LSOs) do not sell directly to patients, for the purposes of this research, we define "customers" as key decision makers, providers or clinicians for prescribing or buying a therapeutic drug, medical product or diagnostic test. For pharmaceutical and biotechnology organizations, this includes all stakeholders with prescribing authority, such as physicians, physician assistants and nurse practitioners. For medical device and diagnostics organizations, this also includes hospitals, clinics, surgical centers, nursing homes, laboratories and other medical sites.

The market consists of vendors offering a diverse set of solutions to enable the life science selling model. Foundational capabilities for CRM are included in Table 1, segmented by the needs of biopharmaceutical organizations (pharmaceutical and biotechnology organizations) and medical device organizations (medical device and diagnostics organizations).

Table 1: Foundational Life Science CRM Functionality

(Enlarged table in Appendix)

Source: Gartner (November 2023)

Market Direction

Personalized Journey Orchestration Is a Growing Requirement for Customer Engagement Transformation

The global pandemic has reaffirmed the need for more-holistic approaches to engaging customers — HCPs, HCOs and other medical decision makers and influencers. These stakeholders highly value information that is personalized and relevant to their practices and businesses. In fact, a recent survey by Sermo found that 81% of global HCPs reported that personalization is important to them, and 50% said it bothers them when they receive generic content. [1] Technology platforms, like CRM, are supposed to deliver a comprehensive "customer 360-degree view" that would foster deeper engagement by incorporating customers' preferences, behaviors, attitudes and other data. Yet, what started as a business strategy ended up as a siloed and fragmented customer experience.

CIOs and their executive peers have a new mandate to transform their CRM approach by connecting their technology and operating frameworks under a parent business architecture built for orchestrating personalized interactions across digital and analog touchpoints to drive business impact.
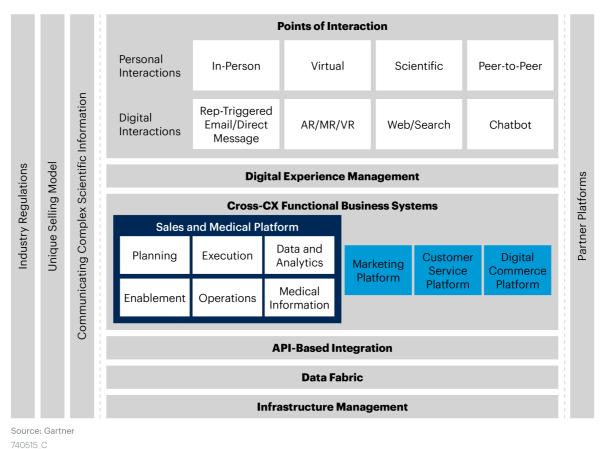
Today, CRM deployments are fragmented across business units. The CRM consists of point solutions within each business area, such as sales, marketing, customer service, market access and medical affairs, that have siloed CRM platforms, business processes, data stores and technology architectures. This siloed approach has led to a focus on internal business operations and needs, rather than understanding experiences that earn customers' trust, which in turn leads to acquisition, retention and growth.

CRM Must Support the Composable Architecture Approach to Meet Future Personalization Requirements

Transformation depends on the LSO's technology maturity level and architecture's adaptability. Technology flexibility is required to employ a personalized, data-driven customer engagement strategy. Current IT systems are clearly not up to this task. Only a composable digital life science platform (DLSP) architecture will enable the adaptability needed to integrate customer centricity throughout the CRM program (see Innovation Insight for Digital Life Science Platforms). In the DLSP architectural approach, CRM is a sales and medical engagement application that contributes data and application functions for recombination and reuse across the enterprise (see Figure 1).

Figure 1: Life Science CRM Reference Model for Sales and Medical Information Enablement

Life Science CRM Reference Model for Sales and Medical Information Enablement

Source: Gartner
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Gartner

LSOs lag other industries in adopting composability, in part due to monolithic systems that are not compatible with composable architectures (see Use Gartner's Reference Model to Deliver Intelligent Composable Business Applications). To accelerate digitalization and make progress toward composability, CIOs must assess the CRM program for its compatibility with composable architectures. The first step is to modernize legacy CRM capabilities to enable next-generation personalization capabilities.

Next-Generation CRM Platforms Are Composable

Next-generation CRM is more agile and intelligent than current solutions. It enables organizations to launch new drugs or devices efficiently and enables real-time information sharing across the commercial ecosystem. It supports algorithm-based decision making to improve customer experience (CX) and employee experience (EX) and brings about commercial efficiency.

Next-generation CRM exhibits the following characteristics:

- **Total experience (TX)** — TX is a strategy that connects multiexperience (MX) with CX, EX and user experience (UX) disciplines to create superior experiences and deliver business outcomes that are mutually beneficial to all stakeholders, including customers, partners and LSO employees (see Top Tech Trend: Total Experience for Life Sciences). For example, P360 enables compliant, frictionless and on-demand direct messaging between providers and life science employees across multiple channels. Personalized videos can improve customer experience by delivering personalized, relevant content during the customer journey and amplify the field representatives' reach, especially for customers with limited access. For example, viihealth utilizes natural language processing (NLP) to enable field representatives to record personalized videos, while maintaining compliance using preapproved script templates.

- **Intelligence** — Intelligence and, more narrowly, AI are concise catchall terms that denote the shift from highly analog decision making to automated, algorithm-based decision making. This means supporting field users with AI-based decision support tools to improve their productivity. Several life science vendors have matured advanced decision support tools that they've created for sales representative engagement to include nonpersonal engagements. Representative vendors with next-best-interaction capabilities include Aktana, D Cube Analytics, IQVIA and ZS. Augmented business intelligence platforms, such as WhizAI, enables field users to quickly identify data trends and anomalies through conversational interfaces, natural language technologies and visualizations. Other examples include NLP-driven conversational agents to facilitate service requests from field representatives.

- **Digital scalability** — Digital scalability is the concept of using digital tools to handle the increasing volume of customer interactions that are part of the sales enablement process. This means introducing new tools to field representatives, helping them become digital-first sellers. It also means transforming sales enablement practices, introducing processes that help field personnel with new approaches such as hybrid engagements. For example, Tact.ai provides a unified user interface to streamline sales enablement processes that previously required interactions with multiple systems and workflows. Alucio's scientific exchange platform enhances medical and scientific dialogues between field medical professionals and life science customers through in-person and virtual modalities.

- **Hyperautomation** — "Hyperautomation" refers to an effective combination of complementary sets of tools that can integrate functional and process silos to automate and augment business processes. This means automating sales process steps that were previously very analog, such as call plan refinements in biopharmaceuticals. For example, modern sales performance management tools from vendors such as Axtria and ZS provide measurable reduction in the cycle time of sales operation processes. ACTO provides a unified, seamless platform that streamlines training processes to increase efficiencies for both field users and their managers, increasing visibility as to how content and training are impacting business objectives.

- **Data fabric** — A data fabric is a design framework for attaining flexible, reusable and automated data integration pipelines, services and semantics. The fabric leverages data integration, active metadata, knowledge graphs, semantics, machine learning (ML) and data cataloging and supports a broad spectrum of operational and analytics use cases. For example, a data fabric can be utilized to deliver a 360-degree customer view to connected services, such as customer service agents, self-service portals and conversational agents.

Sales Representative Role Morphs From "Influencer" to "Concierge," Accelerating Digital-First Adoption

The future of sales is the permanent transformation of an organization's sales strategies, processes and allocation of resources, moving from a sales-representative-centric to a customer-centric orientation and moving from analog sales processes to hyperautomated, digital-first engagement. The movement to multiexperience engagement will exponentially increase the number of touchpoints and possible permutations of interactions that an LSO can orchestrate with its customers. This increase means that sales representatives will need new technology, data and analytics capabilities to support those roles and processes.

Gartner introduced the idea of a "concierge" sales representative, which is a digitally enabled sales representative, a decade ago. However, it never reached mainstream adoption, as many life science brands preferred not to change their business models for fear of revenue disruption. The pandemic has changed that calculus. Digital "concierge representatives" won't be asked to drop off samples or engage in two-minute elevator speeches, but rather, will invest significant time nurturing long-term relationships with their customers. Face-to-face engagement will change from the inside-out, "I have a presentation for you," to the outside-in, "What do you need from my organization, and how can I facilitate that?"

CRM systems, being a foundational technology in any commercial sales technology stack, must be an enabler of this shift and be used to engender, cultivate and enforce consistent sales execution across all customer touchpoints. To that end, Gartner recommends that all LSOs examine their CRM implementations to improve the tools' support for personalized engagements across the entire customer journey.

Vendors delivering on this model to transform the sales experience will shine brightly as an optimal choice. The new method of driving optimized and successful engagement with HCPs links AI-driven insights directly with the customer's multiexperience journey.

Market Analysis

CRM Market Is Mature, but Capabilities Are Expanding

CRM systems serve as a system of record for organizations that are planning to or already have commercialized a drug, medical device or diagnostic test. As such, adoption of CRM is nearly universal. CRM vendors are responding to changing life science market dynamics (that is, shift toward digital-first engagement, customer centricity and leveraging AI-based decision support capabilities). CRM vendors are also responding to business changes (that is, growth in personalized medicine portfolio and connected care models) and constraints (that is, access and increased focus on therapeutic and product value). These changes present an opportunity to CRM vendors for continued product enhancements and share growth.

Market Segmentation

The majority of CRM deployments in life sciences are based on the Salesforce platform, including industry-specific verticalized platforms, such as IQVIA, Pitcher, ServiceMax and Veeva. Microsoft continues to gradually increase its footprint in life sciences with its Microsoft Cloud for Healthcare, an industry-specific cloud architected to deliver seamless digital experiences, enhance collaboration and accelerate innovation through its integrated suite of enterprise tools. Microsoft focuses on strategic partnerships with industry partners, such as Exeevo and Trueblue, to create industry-specific verticalized solutions to address the needs of its life science customers. For example, a top 20 biopharmaceutical organization has selected Exeevo to provide CRM capabilities for its European region. [2] While other cross-industry vendors, such as Oracle and SAP, support sales processes within their CRM platforms, their overall market share in the life science industry remains negligible (see Magic Quadrant for Sales Force Automation Platforms for a comprehensive listing of cross-industry platforms).

The majority of medical device and diagnostics organizations utilize the Salesforce platform. However, without an industry-verticalized solution, these organizations undertake extensive customization projects to meet industry-specific requirements. Recently, Exeevo and Veeva have launched new industry-specific platforms for this subsector with the promise of integrated functionality to support many industry requirements, alleviating the need for extensive customizations. Exeevo's Omnipresence platform is built on Microsoft Cloud for Healthcare, [3] and Veeva's MedTech CRM platform is built on its proprietary vault platform. [4]

In contrast, biopharmaceutical organizations utilize verticalized, industry-specific solutions to meet their requirements. IQVIA's Orchestrated Customer Engagement (OCE) and Veeva Multichannel CRM, both built on top of Salesforce, remain the market leaders with a significant global presence. Veeva continues to lead the biopharmaceutical CRM market, and announced that, in its estimation, more than 80% of industry sales representatives in developed markets utilize its platform. [5],[6] IQVIA continues to grow market share of its OCE platform that accelerates transition to AI by augmenting traditional sales playbooks with AI-guided intelligence. [7] Exeevo's Omnipresence, built on Microsoft Cloud for Healthcare, offers an industry-verticalized solution that delivers unified customer experience through customer journey orchestration as well as providing an alternative to the Salesforce ecosystem. [8]

Other notable vendors in life sciences include Pitcher and Trueblue. Pitcher provides a unique approach to CRM, with its Super App (front end) capable of integrating with several global CRM platforms (back end), such as Microsoft Dynamics 365, Oracle, Salesforce and SAP. [9] Trueblue's AiDEA seeks to differentiate itself using advanced analytics as its foundation, simplifying field engagement through its conversational interface. [10]

Regional vendors are still attempting to grow into global providers, but challenges remain and are increasing as established global vendors continue to invest in, and add, new capabilities to support region-specific needs.

Region-Specific Data Security and Privacy Needs Are Growing

Region-specific requirements, such as data security and privacy regulations, and support for local business models outweigh the desire to have a harmonized global CRM solution. For example, LSOs operating in China now must make a decision on how to comply with China's recent data security and privacy regulations, especially when data-processing activities involve personal information, "important" data, third-party data sharing and cross-border data transference (see Still a Moving Target — What to Do With the Chinese Data Security Law). China's Data Security Law (DSL) in 2021 lays out a framework for classifying and protecting data gathered and stored in China, based on the potential impact on national security, and regulates data transfer depending on data classification. PIPL in 2021 references concepts and techniques from the EU GDPR. It maintains unique provisions to accommodate local regulatory and business needs, including special requirements for consent management, data localization and cross-border data transfer.

Such requirements provide an advantage to vendors that address such region-specific requirements.

Representative global vendors with customized offerings for the Chinese market include Exeevo, Euris Group, IQVIA, Pitcher and Veeva.

Market Growth and Expansion

CRM market share in life sciences is measured by the number of field users using the CRM platform as a system of record, with nearly all vendors having transitioned to a per-user, per-month licensing model and cloud delivery. As a result, overall market growth or reduction is directionally correlated with the number of field users added or removed within the life science industry.

The past decade has seen an increase in sales representatives from the low point of 2012. [11] However, replicating such growth in established markets (the U.S., Western Europe and Japan) [12] will be a challenge. Factors contributing to the decline of sales representatives in established markets include customer preferences for digital-first engagement [13] and access constraints. In addition, the biopharmaceutical therapeutic portfolio is changing with a greater emphasis on precision medicine (such as biologics, CAR T-cell therapies and rare diseases), [14] which require a lower number of sales representatives due to highly targeted specialties.

Yet, opportunities for market growth remain, including:

- **Emerging organizations** — More and more emerging biopharmaceutical organizations are opting to develop and commercialize their own drugs, a significant increase compared with five years ago. [15] Organizations commercializing their first products seek a fully integrated, end-to-end commercial ecosystem to accelerate implementation timelines and minimize product launch investments.

- **Capability extensions** — Vendors continue to offer new functionality through add-on modules, such as compliant direct messaging, representative-triggered email, virtual engagement and field analytics. The add-on modules are also typically licensed under the per-user, per-month subscription model.

- **Support for nonsales roles** — This extends functionality to natively support the unique needs of growing, strategically important field- and home-office-based roles. These roles include medical science liaisons (MSLs), key account managers, digital and inside sales representatives, medical device service representatives, and medical device technical and support representatives.

- **New markets** — Rapidly growing life science markets, such as China and India, seek modern CRM capabilities to improve the communication effectiveness with their customers and optimize their growing field forces' performance. [16]

- **New segments** — Vendors are expanding their offerings to meet the industry's demand for customer centricity, as well as create new solutions for life science subsegments. For example, Exeevo's Omnipresence solution aims to provide a unified experience across sales, marketing and customer service functions, replacing the need for a separate CRM solutions. [17] IQVIA's OCE platform is expanding functionality to include integration with Salesforce Marketing Cloud through integrated journey management. [18] Veeva recently launched an industry-specific CRM offering for the MedTech market built on its Vault platform. [19]

Value Realization Is Paramount for Sustaining Investments

Many life science CIOs highlight in Gartner inquiries that achieving value from the CRM investments is now more important than ever as they assess the long-term impact of COVID-19 on the sales-representative-based engagement model. While definitions of the term "value" vary, for many CIOs, it means getting advanced capabilities at a reasonable price. Gartner believes that this view represents a significant market trend, because it fits with the natural life cycle of enterprise technology. As the current generation of CRM technology approaches this maturity curve, vendors that do not modernize their offerings with advanced technologies and reimagined sales enablement models will face commoditization. If commoditized capabilities are bundled with premium license prices, as is the case with some vendors, then the movement toward finding value will accelerate.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Market Introduction

This research covers select providers offering CRM products for the pharmaceutical, biotechnology, medical device and diagnostics manufacturer market (see Note 1). Table 2 shows the representative vendors in the CRM solution market listed in alphabetical order, along with the vendor solution name.

Table 2: Representative Vendors in CRM in Life Sciences

(Enlarged table in Appendix)

Vendor	Product, Service or Solution Name
Actis Sales Technologies	actisCRM
Cirrius Technologies	Phyzii Pharma CRM
Close-Up International	SfNet Reps
Creatio	CRM platform
CRMNEXT	Pharma CRM Software
Euris Group	SmartReps
Exeevo	Omnipresence
GEDYS IntraWare	GEDYS IntraWare CRM
Inception CRM	Inception CRM
Infonis International	CBIM
Interactive Medica	Interactive Medica
IQVIA	Orchestrated Customer Engagement (OCE)
Kapture CRM	Kapture CRM for Pharmaceutical Industry
Media-Soft	Sales Vision CRM
Medismo	Medismo Pharma CRM
monday.com	monday.com CRM
Pitcher	Pitcher Super App
SalesBabu Business Solutions	SalesBabu CRM
ServiceMax	ServiceMax Core ServiceMax FieldFX ServiceMax Engage
StayinFront	StayinFront EdgeRx StayinFront TouchRx
Synergistix	Customer Analysis & Targeting System (CATS)
TikaMobile	TikaPharma TikaDevice TikaCapital TikaMSL TikaMarketAccess TikaNAM
Trueblue	AiDEA
Veeva	Multichannel CRM Veeva Medical CRM VaultCRM for MedTech ChinaSFA
Zoho	Zoho CRM for Life Sciences

Source: Gartner

Market Recommendations

Life science CIOs evaluating CRM solutions to enable their organizations' sales enablement and customer engagement strategies should:

- Shift investments away from traditional sales enablement initiatives by reimagining customer relationships and journeys based on effortless experience design that includes digital touchpoints and interaction modalities.

- Build knowledge and expertise in total experience processes and technologies as new channels are added to the marketing mix.

- Educate business peers on the value of providing personalized and customized, actionable recommendations to sales representatives by using AI to nudge them with specific insights on how to reach and exceed their performance expectations. These insights can lead to behavioral transformation in the long run.

- Identify the geographies where the organization needs to deploy CRM capabilities as one of the first steps in its strategy. There are only a few vendors with a global presence. If the organization seeks something more regional, there are other options, but with trade-offs in terms of functionality, local support and market expertise.

- Automate and simplify CRM processes by assembling a multidisciplinary team that blends technology and business expertise (see IT-Business "Fusion" Teams and How They Can Deliver Innovation), to identify and streamline processes for effectiveness and efficiency. Ensure to include stakeholders from the IT, sales, marketing and compliance functions who are integral to the success of such initiatives.

CIOs should use this Market Guide to create a shortlist of vendors that are appropriate for the organization by narrowing down vendors that are appropriate for the organization's requirements and strategic vision for personalized engagement:

- Prioritize vendor integration or native capabilities for digital engagement that include capabilities such as approved email, microsites, virtual meetings and webinars. Assess vendors' capabilities or partnerships for augmented reality and virtual reality to support product demonstrations.

- Assess the maturity of CRM vendors' integrations between their solution offerings and multichannel marketing hubs, content management systems and journey orchestration tools to ensure optimal end-user experience.

- Assess the vendor's ability to integrate the organization's customer 360-degree initiatives with the CRM platform to complement the organization's efforts to capture customer preferences through sales representatives.

CIOs should determine which vendors' data and analytics approach fit the organization's strategy by asking vendors specific questions about managing data pipelines, ML development and deployment model, data interoperability, and cloud architecture:

- Seek vendors with a holistic approach — that is native or through integration — to optimize channels and marketing message through predictive analytics and algorithms. The opportunity exists to leverage new analytic capabilities to deliver value.

- Match the organization's implementation approach to its overall AI strategy; portfolio of built, bought and outsourced AI solutions; and organizational capabilities as a part of assessing the benefits and challenges of a preferred approach.

- Prioritize vendors with systematic operationalization processes to ensure the integrity, transparency and sustainability of deployed analytical models.

- Evaluate how the CRM platform integrates information from external sources and interoperates with other systems. Prioritize a transparent approach with a defined toolset. If the organization is looking to own the integration process, ensure that the vendor has an open environment so that the organization's team can access and manipulate data without requiring costly support from the vendor.

Acronym Key and Glossary Terms

CCPA	California Consumer Privacy Act
CPRA	California Privacy Rights Act
CX	customer experience
EX	employee experience
GDPR	General Data Protection Regulation
MX	multiexperience
PIPL	Personal Information Protection Law
TX	total experience
UX	user experience

Evidence

Gartner's healthcare and life science analysts periodically survey the CRM market space to keep our data current and provide the fact base for Gartner research. We regularly review company revenue, vendor capabilities, quotes for clients and third-party reports. We also attend industry conferences and user group meetings, and interview customers and CRM consultants to inform our analysis and form our judgments.

[1] What Physicians Really Want, From Clinical Trials to Personalization, Sermo.

[2] Global Japanese Pharmaceutical Company Extends Use of Exeevo Omnipresence to Power Their European Growth of Their Cardiovascular-Metabolic Franchise, Exeevo.

[3] Omnipresence 9.0 Empowers Medical Device Organizations With Optimized Experiences, AI Driven Insights and Agile Commercial Customer Engagement Capabilities, Exeevo.

[4] Veeva Introduces Veeva Vault CRM for Medtech, PRNewswire.

[5] Veeva Systems Pursues New Growth Initiatives Both Inside and Outside of Life Sciences, Forbes.

[6] Veeva Systems (VEEV) Q1 2023 Earnings Call Transcript, The Motley Fool.

[7] IQVIA Holdings, Inc. (IQV) Q4 2021 Earnings Call Transcript, The Motley Fool.

[8] EXEEVO Continues Accelerated Growth in the First Half of 2022 With New and Expanded Global Pharmaceutical and Medical Device Organizations Agreements, Exeevo.

[9] Integrations, Pitcher.

[10] Trueblue Designs the Future of Artificial Intelligence and Analytics for Healthcare With AiDEA Integrated With Microsoft Dynamics 365, Trueblue.

[11] Infographic: Pharma Sales Force by the Numbers, BioPharma Dive.

[12] Veeva Systems (VEEV) Q3 2022 Earnings Call Transcript, The Motley Fool.

[13] Exclusive: Pfizer to Cut U.S. Sales Staff as Meetings With Healthcare Providers Move to Virtual, Reuters.

[14] CDER Continues to Make Rare Diseases a Priority With Drug Approvals and Programming to Speed Therapeutic Development, FDA.

[15] Global Trends in R&D 2022, IQVIA.

[16] The Healthcare & Life Sciences Sector in China Is Booming, PageGroup.

[17] Empower HCPs, Health Systems, Pharmacists, Exeevo.

[18] Orchestrated Customer Engagement, IQVIA.

[19] Deliver a Personalized Customer Experience, Veeva MedTech.

Note 1: Representative Vendor Selection

Vendors included in this research represent technology providers that provide all or a portion of the major components described in this document. Vendors were identified by analyst interactions in the market, as well as through external research of publications and other public sources. The vendors included do not imply an exhaustive list.

Document Revision History

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Life Science CIOs: Embrace Personalization to Transform the Healthcare Provider Experience

Magic Quadrant for Sales Force Automation Platforms

Toolkit: RFP for Sales Force Automation Platform

Market Share Analysis: CRM Sales Software, Worldwide, 2021

Top Tech Trend: Total Experience for Life Sciences

Quick Answer: What Is Revenue Enablement?

Table 1: Foundational Life Science CRM Functionality

Capability	Description	Biotechnology and Pharmaceutical Organizations	Medical Device and Diagnostics Organizations
Account and contact management	Enables end users to create and maintain account and contact records as part of a customer life cycle program. Includes the ability to augment account profile with sales-representative-specific attributes (such as designation, best time to call and practicing status), data management practices used to maintain record accuracy (such as data cleansing, appending and deduplication), and ability to maintain relationships (such as associate and affiliate accounts and addresses).	X	X
Activity management	Capturing interactions with one or more prospects and customers. Includes recording the activity and the associated interaction details, including products presented, samples dropped, obtaining customers' electronic signature for received samples, notes (free text or	X	X

	structured), plan for next call, and case tracking. Also includes the ability to integrate with a user's existing email and calendar applications.			
Key account management	Enable field representatives to plan and manage their relationships with strategically important customers, such as group practices, payers, clinics, hospitals, healthcare systems and governments.	X		X
Opportunity management	Enables managing sales deals. This includes the ability to create and maintain selling teams for specific opportunities, create and view opportunity pipeline reports, apply AI-based predictive analytics models to opportunities, and capture the level of buyer engagement on a specific opportunity.			X
Forecast management	Allows sales representatives to create and maintain periodic sales forecasts within prescribed forecast categories. Also includes functions for managers to create and maintain forecasts for a sales team and provide win/loss			X

	analysis capabilities beyond descriptive reporting.		
E-detailing and content management	Identifies, manages and presents the content and visual detail aid presentation in an interactive mode for customers. Tracks and captures interaction data during the presentation (time on screen, customer feedback and navigation click-throughs).	X	X
Virtual (remote) engagement	Facilitates one-to-one or one-to-many online meetings or webinars, using videoconferencing to provide promotional and educational information to HCPs using preapproved content related to the drug or product.	X	X
Representative-triggered email	Enables a sales representative to select an email template and send to one or more HCPs. Templates are typically built and approved centrally as compliant content.	X	X
Digital sales rooms	Provides functions for customers and selling field representatives to collaborate. Capabilities include a personalized persistent microsite for	X	X

	the life of the customer's relationship with the organization, personalized portals, bidirectional content sharing. Capabilities also include web conferencing, call scheduling, collaboration, complex deal negotiation, e-signature, engagement analytics, conversation analysis, emotion analysis and a link to digital commerce.		
External communications (co-browsing)	Enables a field representative to guide a customer navigating the web. Typically, this is done with compliant and approved company content.	X	X
Sample management	Leverages a validated mini-inventory management system to receive sample shipments, perform inventory reconciliation and review inventory levels.	X	
Field inventory management	Supports inventory management needs, such as consignment of inventory, loaner set management and demo machine tracking. Also supports sample management workflows, including approvals.		X
Consent and preference management	Captures customer's consent for	X	X

	compliance, data privacy restrictions and communication preferences (such as preferred content, channel and time), using a multidimensional preference structure.		
Event management	Provides functionality to manage events attended by customers to educate or promote products. Includes integrated functionality that can be used by field representatives to invite customers to the event as well as requisite approval workflows.	X	X
Configure, price and quote	Supports defining the pricing, options and business rules for a product with customizable features. Also includes features for viewing, creating and maintaining and approvals of quotes and orders. Supports formula-based pricing and viewing of historical data.		X
Order management	Enables capturing, managing and tracking orders through integration with ERP and appropriate fulfillment systems.		X
Service management	Supports handling of service requests, work orders and customer issue management. Provides options		X

		X	X
	for self-service and real-time notifications to both customers and field teams.		
Customer service management	Provides contact center functionality enabling home office personnel (for example, customer service representatives) to connect with customers by phone, chat or email. Also supports customer inquiry, issue management and notifications.	X	X
AI-driven decision support	Provides native functions for presenting next-best-action recommendations to field representatives based on advanced analytics algorithms that act on available internal and external data, predefined best practices, and static business rules. Advanced functionality includes advanced AI models that provide dynamic suggestions.	X	X
Reports and dashboards	Provides access to reports and dashboards offering field representatives account-level information, including performance achievement level against plan.	X	X

	Includes advanced analytics, such as trend analysis, custom calculations, and integration with external business intelligence tools for detailed reporting.				
Home office analytics	Provides standard reports and analytics for home office users to analyze, and CRM-related data.	X		X	
Territory management	Enters time-on or time-off territory to ensure proper coverage. Reviews statistics for weekly, monthly and annual time frames, based on plan and budget.	X		X	
Coaching and training	Enables field managers to capture details and perform evaluations while in the field. Also includes ability to create and share personal development plans, assign training and feedback with field representatives.	X		X	

Source: Gartner (November 2022)

Table 2: Representative Vendors in CRM in Life Sciences

Vendor	Product, Service or Solution Name
Actis Sales Technologies	actisCRM
Cirrius Technologies	Phyzii Pharma CRM
Close-Up International	SfNet Reps
Creatio	CRM platform
CRMNEXT	Pharma CRM Software
Euris Group	SmartReps
Exeevo	Omnipresence
GEDYS IntraWare	GEDYS IntraWare CRM
Inception CRM	Inception CRM
Infonis International	CBIM
Interactive Medica	Interactive Medica
IQVIA	Orchestrated Customer Engagement (OCE)
Kapture CRM	Kapture CRM for Pharmaceutical Industry
Media-Soft	Sales Vision CRM
Medismo	Medismo Pharma CRM

monday.com	monday.com CRM
Pitcher	Pitcher Super App
SalesBabu Business Solutions	SalesBabu CRM
ServiceMax	ServiceMax Core ServiceMax FieldFX ServiceMax Engage
StayinFront	StayinFront EdgeRx StayinFront TouchRx
Synergistix	Customer Analysis & Targeting System (CATS)
TikaMobile	TikaPharma TikaDevice TikaCapital TikaMSL TikaMarketAccess TikaNAM
Trueblue	AiDEA
Veeva	Multichannel CRM Veeva Medical CRM VaultCRM for MedTech ChinaSFA
Zoho	Zoho CRM for Life Sciences

Source: Gartner