



# *Beyond* technology:

Driving CRM transformation through persona-based change management

# Executive summary

The Life Sciences industry is undergoing a significant shift in CRM transformation, driven by a major platform provider's decision to discontinue a long-standing technology partnership. This development presents both challenges and opportunities for organizations to reimagine their CRM strategies and build next-generation platforms that enhance agility, compliance, and customer engagement.

Successful CRM transformation extends beyond technology upgrades; it demands a holistic approach that aligns people, processes, and governance with business objectives. A robust change management framework is essential to ensure smooth adoption and minimize operational disruption. Capgemini advocates a persona-based change management strategy as a key enabler for this transformation. By tailoring interventions to specific roles, organizations can address diverse needs effectively, driving efficiency and sustained adoption.

However, the journey is not without hurdles. Common challenges include resistance to AI-driven CRM systems, operational complexity during migration from legacy platforms, and uncertainty around redesigned workflows. These factors can lead to skepticism, business disruption, and slow adoption if not managed proactively.

Capgemini's Change Management Framework addresses these challenges through four pillars: Foundation, Stakeholder Engagement, Training & Enablement, and Continuous Monitoring. At the heart of this framework lies the Persona Impact Assessment Matrix, which evaluates technical and functional impacts across roles. This targeted approach enables organizations to design role-specific interventions, accelerate adoption, and reduce transformation risks.

By leveraging proven methodologies and accelerators, Capgemini helps Life Sciences organizations turn disruption into opportunity. Our approach ensures strategic alignment, mitigates risks, and fosters a CRM ecosystem that is agile, compliant, and customer centric. This PoV outlines actionable strategies, persona-level impact mapping, and best practices to drive successful CRM transformation in an evolving digital landscape.

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# Unlocking strategic value through next-gen CRM transformation

The Life Sciences CRM landscape is undergoing a significant transformation, driven by a major 2022 announcement in which the industry's leading CRM provider, holding major market share, declared it would conclude a longstanding strategic partnership. This decision has had far-reaching implications across the sector.

This strategic decoupling has ignited a burning platform scenario, compelling organizations to reevaluate not just their CRM systems but the entire ecosystem of patient and customer-facing technologies. As legacy platforms face obsolescence, Life Sciences companies are presented with a rare inflection point: the chance to reassess their CRM strategies, reduce technical debt, and architect a next-generation customer engagement backbone. This transformation is not merely a technological upgrade, it's a strategic opportunity to optimize processes, enhance agility, and future-proof commercial operations in an increasingly digital and patient-centric world.

In this Point of View (PoV), we have built a comprehensive exploration of how persona-based change management can serve as a strategic enabler for change management of CRM transformation - covering frameworks, impact assessment tools, and actionable insights to drive adoption, mitigate risk, and align transformation with business goals.



# Enabling sustainable adoption through targeted change management

As Life Sciences organizations embark on CRM transformation, a robust change management strategy becomes not just beneficial but essential. The transition offers a rare opportunity to reimagine customer engagement models, personalize interactions with healthcare professionals (HCPs), and integrate AI-driven capabilities that elevate commercial effectiveness.

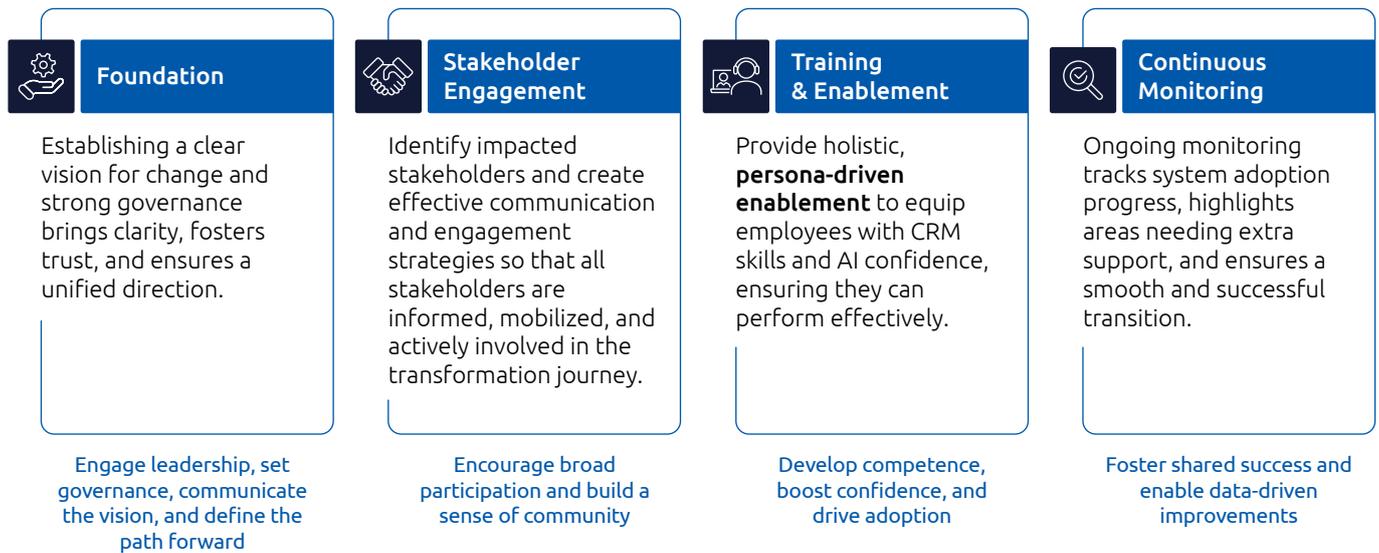
However, the success of this transformation hinges on more than just technology; it requires aligning change with strategic business goals, not just deadlines. Employees deeply familiar with legacy systems often face resistance or confusion when navigating new interfaces and workflows. Without structured onboarding, targeted training, and ongoing support, productivity can suffer, and adoption may be slow.

Moreover, the Life Sciences industry operates in a highly regulated, data-sensitive environment, where misalignment or poor execution can lead to compliance risks and reputational damage. A strong change management framework ensures that stakeholders are engaged early, communication is clear and continuous, and the organization is equipped to adapt with agility. Ultimately, it transforms CRM change from a disruptive event into a strategic enabler of innovation, efficiency, and long-term growth.

For successful CRM transformation, organizations require a structured and adaptive **Change Management Approach** that ensures clarity, engagement, and sustained adoption.

Capgemini’s framework is anchored on four interdependent pillars that collectively drive alignment, enablement, and measurable behavioral change.

### Our Change Management Approach with four key pillars



Central to this approach is the **Persona-based impact assessment**, which enables a differentiated understanding of how distinct user groups experience transformation. Every persona across Sales, Medical Affairs, Compliance, IT and Commercial Operations interacts with the CRM in unique ways. Shaped by their workflows, dependencies, and success metrics.

The framework evaluates the degree of change across key personas, ranging from field sales and medical affairs to compliance, IT, and commercial operations. It assesses impact across both **technical** and **functional dimensions**, such as user experience, backend infrastructure, Data Governance & Compliance, upskilling needs, business process shifts, and cross-functional collaboration.

Each dimension is assessed at three levels of impact - **High, Medium, and Low** to help identify where the most significant change management efforts are needed. By mapping these dimensions against each persona, the framework enables organizations to prioritize change

management efforts, tailor interventions, and ensures that change is not only adopted but also aligned with strategic business goals, enabling smoother transitions and sustained transformation outcomes.

**Persona Impact Assessment Matrix**

Dimension	Technical Impact				Functional Impact			
	User Experience	Backend Infrastructure	Data Governance and Compliance	Upskilling	Business Process	Cross-Functional Collaboration	Performance Metrics & Reporting	
Description	<ul style="list-style-type: none"> <li>Degree of change in the CRM interface, navigation, and interaction patterns for end users</li> </ul>	<ul style="list-style-type: none"> <li>Extent of changes to system architecture, data models, integrations, and platform dependencies</li> </ul>	<ul style="list-style-type: none"> <li>Change required to ensure CRM aligns with regulatory standards and internal data governance policies</li> </ul>	<ul style="list-style-type: none"> <li>Level of new technical or functional knowledge required to operate effectively post-change</li> </ul>	<ul style="list-style-type: none"> <li>Degree to which existing business processes are altered due to CRM transformation</li> </ul>	<ul style="list-style-type: none"> <li>Impact on how the persona interacts with other teams or stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Extent to which CRM transformation affects how performance is measured, reported, and interpreted across roles</li> </ul>	
Level	High	<ul style="list-style-type: none"> <li>Complete redesign of UI/UX</li> <li>New workflows introduced</li> <li>Navigation must be relearned</li> </ul>	<ul style="list-style-type: none"> <li>Major platform migration, re-architecture</li> <li>New data model needed</li> <li>Multiple integrations impacted</li> <li>Level of Code changes</li> </ul>	<ul style="list-style-type: none"> <li>Major overhaul of data handling processes</li> <li>New compliance modules or workflows needed</li> <li>Significant audit trail and validation requirements</li> </ul>	<ul style="list-style-type: none"> <li>New tools, workflows, or systems introduced</li> <li>Formal training and certification required</li> </ul>	<ul style="list-style-type: none"> <li>Core processes redefined</li> <li>New SOPs required</li> <li>Significant change in daily operations</li> </ul>	<ul style="list-style-type: none"> <li>New stakeholder relationships</li> <li>Major changes in collaboration workflows or data sharing</li> </ul>	<ul style="list-style-type: none"> <li>KPIs and reporting structures are redefined</li> <li>New dashboards and analytics tools introduced</li> <li>Users must learn new metrics</li> </ul>
	Medium	<ul style="list-style-type: none"> <li>Moderate UI/UX changes</li> <li>Some new features or layout adjustments</li> <li>Partial retraining needed</li> </ul>	<ul style="list-style-type: none"> <li>Moderate changes to system architecture</li> <li>Update to existing Data model</li> <li>Some integration and APIs changes</li> <li>Code update needed but in same language</li> </ul>	<ul style="list-style-type: none"> <li>Moderate updates to data access controls, consent management, and reporting formats</li> <li>Some policy alignment needed</li> </ul>	<ul style="list-style-type: none"> <li>Some new features or processes</li> <li>Informal training or job aids sufficient</li> </ul>	<ul style="list-style-type: none"> <li>Partial process changes</li> <li>Some steps modified, added or automated</li> </ul>	<ul style="list-style-type: none"> <li>Some changes in reporting lines or inter-team dependencies</li> </ul>	<ul style="list-style-type: none"> <li>Some metrics are updated or reinterpreted</li> <li>Reporting tools enhanced but familiar</li> <li>Partial retraining needed</li> </ul>
	Low	<ul style="list-style-type: none"> <li>Minimal UI changes</li> <li>Cosmetic updates or minor enhancements only</li> </ul>	<ul style="list-style-type: none"> <li>Backend system architecture remains largely unchanged</li> <li>Minor configuration or patch updates only</li> <li>Low/No code change required</li> <li>Few integrations impacted</li> </ul>	<ul style="list-style-type: none"> <li>Minimal changes to compliance data</li> <li>Existing governance and compliance configurations remain largely applicable</li> </ul>	<ul style="list-style-type: none"> <li>No new skills required</li> <li>Existing knowledge remains applicable</li> </ul>	<ul style="list-style-type: none"> <li>Processes remain largely the same</li> <li>Minor procedural updates only</li> </ul>	<ul style="list-style-type: none"> <li>No significant change in collaboration or stakeholder engagement</li> </ul>	<ul style="list-style-type: none"> <li>Reporting remains consistent</li> <li>Minor updates to dashboard visuals or filters only</li> </ul>

# Identifying key personas for change impact

The impact assessment of CRM transformation in the Life Sciences industry must begin with a clear understanding of the diverse personas who interact with the system daily. These roles span across Commercial Operations, Sales, and Medical Affairs, each with distinct responsibilities and CRM touchpoints.

For instance, the Cycle Planning Manager and Territory Alignment Lead rely on CRM to design and monitor field strategies, while the Events and Campaign Management Lead uses it to orchestrate HCP engagements and analyze campaign performance.

The Sales Representative and Field Manager depend on CRM for call logging, territory insights, and performance tracking, making it central to their daily workflows.

In Medical Affairs, roles like the Medical Science Liaison and Medical Information Lead use CRM to document scientific interactions and manage inquiries with precision and compliance. Even the Contact Center leverages CRM to manage case documentation and ensure timely responses. Understanding these personas and their CRM dependencies is critical to designing a change management strategy that is both targeted and effective.



## Recommended Personas

Persona Category	Persona	CRM interaction
<b>Commercial Operations</b>	Cycle Planning Manager	Uses CRM to configure and monitor cycle plans, track execution, and adjust strategies based on performance data.
	Events and Campaign Management Lead	Create Events, Manages event logistics, tracks HCP engagement through events in CRM, and integrates campaign data for performance analysis.
	Territory Alignment Lead	Uses CRM to assign territories, manage rep-to-territory mapping, and ensure alignment with field activities.
	Sample Management Lead	Tracks sample requests, approvals, and deliveries; ensures documentation and compliance.
	Training and Enablement Lead	Monitors user adoption, identifies training gaps, and manages onboarding workflows within the CRM.
	Marketing Analytics Lead	Analyzes campaign ROI, integrates marketing automation data, and ensures closed-loop reporting.
	Market Access Manager	Captures payer/account interactions, formulary updates, and reimbursement discussions within CRM.
	Key Account Manager	Plans and manages key account strategy, enabling cross-functional collaboration and insights tracking.
<b>Sales Team</b>	Sales Representative	Logs calls, schedules visits, captures HCP feedback, and accesses product and territory data.
	Sales/Field Manager	Reviews call activity, monitors KPIs, approves plans, and provides coaching based on CRM analytics.
<b>Medical Affairs</b>	Publication Manager	Tracks scientific interactions tied to publications and HCP engagements.
	Medical Science Liaison	Documents scientific/KOL interactions, schedules meetings, and tracks engagement metrics.
	Medical Information Lead	Logs inquiries, manages responses, and ensures compliance with medical communication standards.
	Contact Center	Uses CRM to check new cases, get the relevant documents for response and track progress.
<b>IT and Security</b>	System Administrator	Assigns new users, Oversees user roles, permissions, and system updates. Also manages application rules and workflows.
	Product Owner / Data Analyst	Reviews dashboards, gathers user feedback, and prioritizes enhancements.
	Data Steward	Monitors data quality, resolves discrepancies, and enforces standards.
	Developer	Develops integrations, configures workflows, and supports technical upgrades.
	ETL and Testing Lead	Tests data pipelines, validates system updates, and ensures integrity post-deployment.
<b>Customer Experience &amp; Support</b>	Patient Engagement Manager	Uses CRM to track and log patient communications across channels (calls, emails, portals) and Collects patient feedback through surveys and forms integrated into the CRM.
	Digital Engagement Manager	Oversees Digital Channels: Manages email, SMS, social media, and app-based communications via CRM integrations. Analyses Engagement Metrics: Tracks open rates, click-throughs, and conversion metrics to evaluate campaign performance.
<b>Regulatory and Compliance</b>	GxP Validation Lead	Validates system changes, documents testing, and supports audits.
	Legal Affairs Manager	Reviews contracts, monitors compliance workflows, and supports legal documentation.
	Regulatory Submissions	Tracks submission timelines, manages document versions, and ensures traceability.
<b>Third Party Applications</b>	Third-Party Integrated Application Owners	Oversees data exchange, monitors integration health, and ensures compatibility during upgrades.

# Visualizing impact: Insights from persona impact mapping

Once key personas are identified, the next step is to visualize their impact. The output of the Persona Impact Assessment Matrix presents a visually intuitive matrix which highlights the degree of impact using intuitive color codes creating a heatmap. Scoring mechanisms can also be added to quantify the impact.

This enables leadership to quickly identify high-impact areas requiring strategic attention, moderate-impact zones needing support, and low-impact areas that are stable or require minimal attention. Such a matrix serves as a practical decision-support tool, guiding prioritization, resource allocation, and tailored change management efforts across teams.

Sample Matrix - Illustrative

Persona	Technical Impact				Functional Impact		
	User Experience	Backend Infrastructure	Data Governance and Compliance	Upskilling	Business Process	Cross-Functional Collaboration	Performance Metrics & Reporting
Cycle Planning Manager	High	Medium	Low	Low	High	Medium	High
Events and Campaign Management Lead	High	Medium	Low	Low	High	Medium	High
Territory Alignment Lead	High	Medium	Low	Low	High	Medium	High
Sample Management Lead	High	Medium	Low	Low	High	Medium	High
Training and Enablement Lead	High	Medium	Low	Low	High	Medium	High
Sales Representative	High	Medium	Low	High	Medium	Medium	Medium
Sales/Field Manager	High	Medium	Low	High	Medium	Medium	Medium
Medical Science Liaison	High	Medium	Low	High	Medium	Medium	Medium
Medical Information Lead	High	Medium	Low	High	Medium	Medium	Medium
Contact Center	Medium	Medium	Low	High	Medium	Medium	Medium
System Administrator	High	High	High	High	Medium	High	Medium
Product Owner / Data Analyst	High	High	High	High	Medium	High	Medium
Data Steward	High	High	High	High	Medium	High	Medium
Developer	High	High	High	High	Medium	High	Medium
ETL and Testing Lead	High	High	High	High	Medium	High	Medium
GxP Validation Lead	Medium	Medium	High	Medium	Medium	Medium	Medium
Legal Affairs Manager	Medium	Medium	High	Medium	Medium	Medium	Medium
Regulatory Submissions	Medium	Medium	High	Medium	Medium	Medium	Medium
Third-Party Integrated Application Owners	Medium	Medium	Low	Medium	Medium	High	Medium

High Medium Low

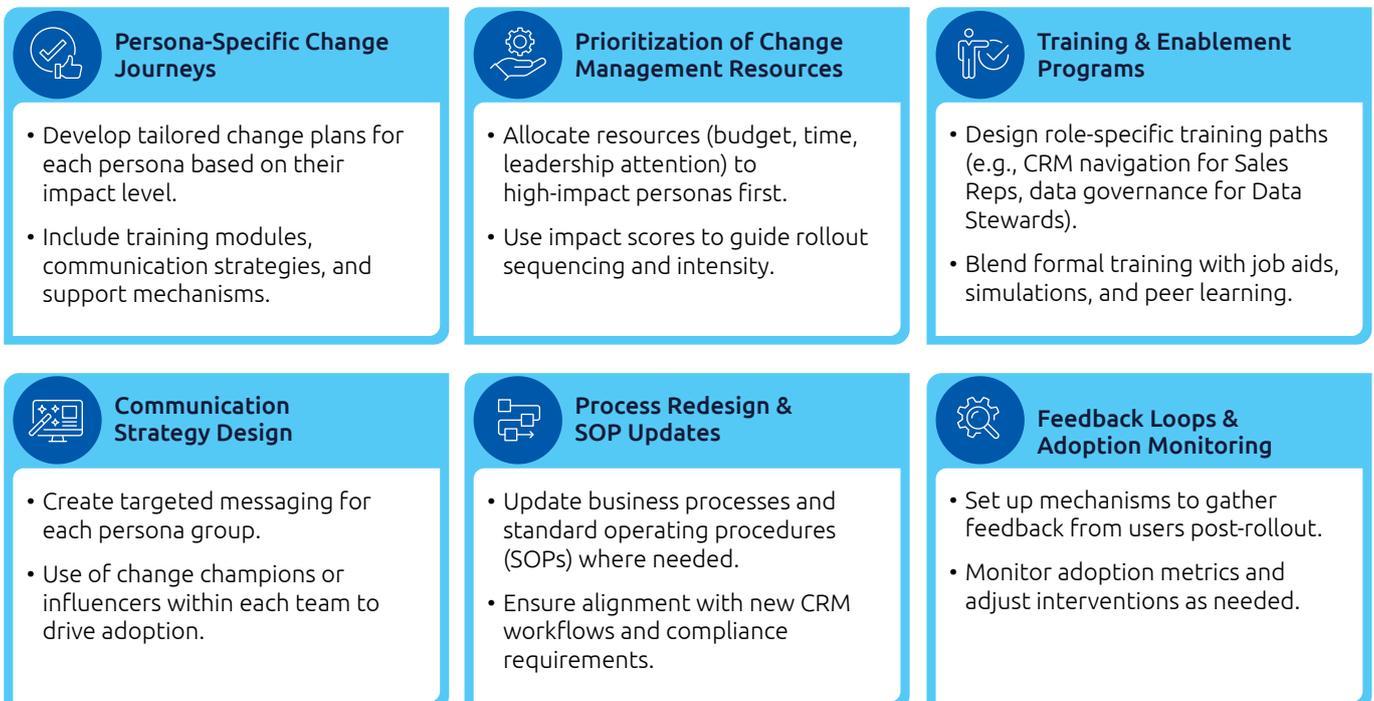
# Translating impact assessment insights into actionable change strategy

Once the impact assessment matrix highlights how different personas are affected, organizations can translate these insights into targeted change initiatives. This begins with crafting persona-specific change journeys that include tailored training, communication, and support plans. Companies can then prioritize change management resources by focusing first on high-impact personas, ensuring efficient allocation of budget, time, and leadership attention. Role-specific training and enablement programs such as Customer Journey mapping for patient engagement manager or User provisioning and onboarding for system administrators help build capability and confidence.

A well-designed communication strategy, supported by internal change champions, ensures consistent and relevant messaging across teams.

Additionally, updating business processes and SOPs to reflect new workflows and compliance needs is critical for operational alignment. Finally, establishing feedback loops and monitoring adoption metrics allows organizations to refine their approach and sustain long-term change.

## Turning Insights into Change



# Business benefits of persona impact assessment

The outcomes of implementing insights from the persona-based impact assessment are both strategic and operational. Organizations can expect accelerated user adoption through personalized onboarding and enablement, which reduces resistance and boosts CRM usage across teams. Business disruption is minimized by proactively identifying high-risk areas and addressing them early, ensuring smooth transitions. For roles sensitive to regulatory requirements, compliance and data integrity are strengthened through validated processes and updated documentation.

The framework also promotes enhanced cross-functional collaboration by establishing clear stakeholder mapping and communication workflows. Ultimately, these efforts lead to strategic alignment, ensuring that CRM transformation initiatives support broader business objectives rather than being limited to technical upgrades.



# Turning disruption into opportunity

CRM transformation in Life Sciences is more than a platform shift, it's a strategic change in how organizations engage, operate, and grow. Success requires a structured Change Management Framework that aligns people, processes, and technology through clear communication, training, and governance.

Within this framework, the Persona Impact Assessment plays a vital role by identifying how different roles are affected and guiding tailored interventions. By combining strategic planning with persona-level insights, organizations can accelerate adoption while maintaining business continuity.

Capgemini has extensive experience in Life Sciences and digital transformation; it supports organizations through a structured change management approach that is both strategic and persona centric.

Leveraging its proprietary frameworks and accelerators, Capgemini helps clients assess impact across roles, define tailored change journeys, and implement targeted interventions from training and communication to stakeholder alignment and process redesign. Our approach integrates seamlessly with tools like the Persona Impact Assessment Matrix, enabling organizations to translate insights into action. Whether it's guiding leadership through strategic decisions or supporting field teams with hands-on enablement, Capgemini ensures that change is not only adopted but embraced.

For a deeper dive into our perspective on CRM transformation in Life Sciences, explore our [Point of View on HCP Engagement](#).



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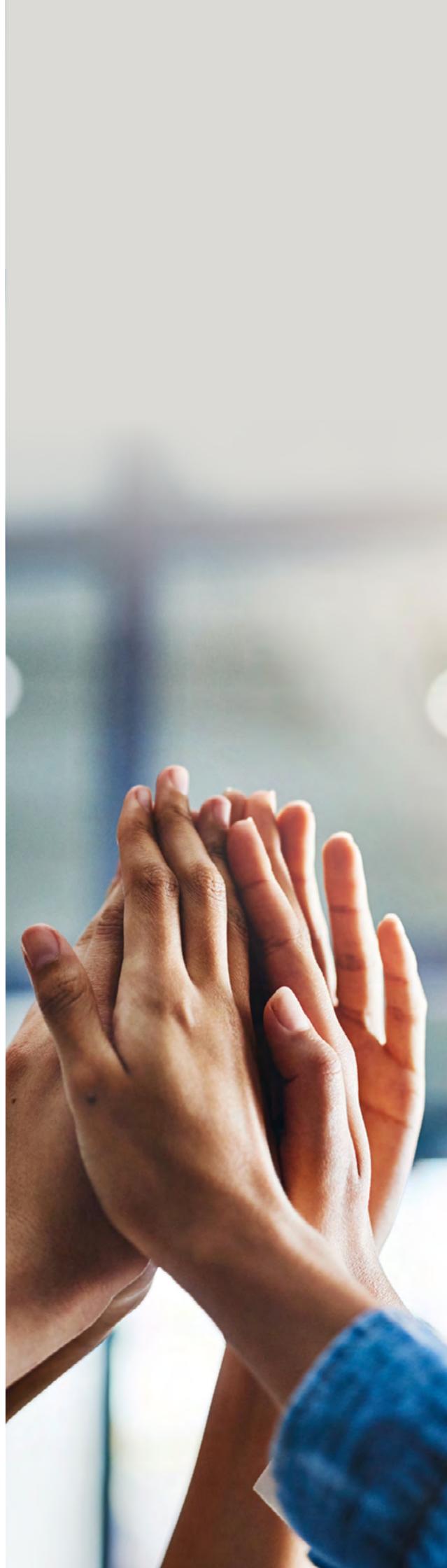


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## About Capgemini

Capgemini is an AI-powered global business and technology transformation partner, delivering tangible business value. We imagine the future of organizations and make it real with AI, technology and people. With our strong heritage of nearly 60 years, we are a responsible and diverse group of 420,000 team members in more than 50 countries. We deliver end-to-end services and solutions with our deep industry expertise and strong partner ecosystem, leveraging our capabilities across strategy, technology, design, engineering and business operations. The Group reported 2024 global revenues of €22.1 billion.

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