

## CASE STUDY #1

# SEAMLESS VAULT CRM MIGRATION

How LPW Helped Bayer, a Top 20 U.S. Pharma Company, Transition with Confidence and Minimal Disruption.



### Customer Overview

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#### The Customer

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Bayer Pharmaceutical

#### Device(s)

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iPad & Online Users

#### Location

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Virtual - US

#### Team Size

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1,459 Sales & Medical Representatives

### The Challenge

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Bayer was transitioning from Veeva CRM to Vault CRM and needed expert support in Change Management, with a focus on Communication Strategy and effective Training.

Although the field teams were proficient in the existing Veeva CRM, leadership wanted to avoid disruption to daily operations and minimize Time Out of Territory.

**The goal:** a smooth transition with “business as usual” maintained throughout.

## Our Solution - Strategic & Targeted Enablement

We partnered with Bayer to develop a comprehensive, custom communication and training plan, tailored to their teams' specific workflows, configuration, and business policies.

### Key Elements



#### Custom Communication Plan

- 13 targeted emails to various stakeholders
- Custom, branded Vault CRM email template for Outlook
- 1 Hype Video
- 1 Overview Transition Flyer
- 2 Quick Reference Cards (QRCs)
- 1 FAQ



#### Tailored Training Delivery

- 2 role-based training videos
- Virtual, Instructor-Led Trainings:
  - 2 hrs (Medical)
  - 1.5 hrs (Commercial)



#### Focus on What Matters

Training focused on the most impactful platform changes—primarily online workflows—while also covering small updates to iPad functionality.

## The Results

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LPW's strategic approach delivered what mattered most—minimal disruption, strong user confidence, and stable post-launch support.



### Minimal Time Out of Territory

Virtual training sessions were short and role-specific (1.5–2 hours), reducing time away from customer-facing responsibilities.



### High System Readiness

Post-training survey results revealed strong confidence among users:

<b>Commercial Confidence Score</b>	9.05 / 10
<b>Medical Confidence Score</b>	8.22 / 10
<b>Commercial CSAT Score</b>	8.77 / 10
<b>Medical CSAT Score</b>	97.65 / 100



### Low Support Burden

Due to a robust communication plan and pre-launch enablement resources, support tickets remained stable post go-live.

***“LPW Training played a pivotal role in our Vault CRM migration. Their expertise in change management, training, communication strategy, and eLearning development ensured our teams were prepared, aligned, and confident from day one.”***

**– Patrick Salonis, Senior Director, Business Solutions & Integrations,  
Bayer Pharmaceuticals**

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***“Huge thanks to all for a great go-live! Bayer is the first Top 20 Pharma company to go live on Vault CRM in the US.”***

**– Senior Director, Business Systems & Operations**

## Why It Worked

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The success of this project stemmed from the strong collaboration between LPW and Bayer, and a shared commitment to minimizing field disruption.

### Need-to-Know Training

Our in-depth knowledge of the differences between Veeva CRM and Vault CRM allowed us to design focused, “need-to-know” training that resonated with users.

### Strategic Communication

Starting communication months ahead of launch ensured the field was well-prepared and confident on day one.

## Looking Ahead

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Next, Bayer is focused on scalable, consistent onboarding for new hires. LPW is developing role-based eLearning series for 3 personas to support ongoing adoption and new hire training:



**COMMERCIAL** 8 Short eLearning Modules

**MEDICAL** 5 Short eLearning Modules

**MANAGERS** 1 Short eLearning Module

## WANT TO SEE SIMILAR VAULT CRM MIGRATION SUCCESS?

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Reach out to us at [info@lpwtraining.com](mailto:info@lpwtraining.com) to learn how we can help your teams transition smoothly—with confidence and continuity.