



CASE STUDY #3

VAULT CRM SUCCESS ON A BUDGET

How LPW helped a Biotech Company Drive Results with a Lean Vault CRM Training Strategy.

Customer Overview

The Customer

Biotech

Device(s)

iPad & Online Users

Location

Virtual - US

Team Size

45 Sales and Medical Representatives

The Challenge



A Biotech company migrating from Veeva CRM to Vault CRM needed a cost-effective, role-specific training solution.

With a limited budget, leadership chose on-demand training to explain key changes without pulling reps from the field prioritizing clarity, efficiency, and minimal disruption.

The goal: to deliver clear, efficient training without pulling representatives out of the field or exceeding the budget.

Our Solution - Budget-Smart Training Design

We partnered with the customer to create a single YouTube-style video that branched into two tailored segments for Sales and Medical teams. This format delivered high-impact, role-relevant training while staying within budget.

Key Elements



Single, On-Demand Video

- Delivered the entire training in one concise, easily accessible format for all team members.



Role-Specific Branching

- Tailored content for Sales and Medical teams to ensure relevance and engagement.



Device-Optimized Content

- Focused on essential updates for both iPad and Online users.



Flexible, Pre-Launch Access

- Released one week before go-live so teams could train at their own pace and schedule.

The Results

LPW's lean, role-focused strategy delivered measurable impact maximizing training effectiveness while minimizing time out of the field and overall costs.



Minimal Time Out of Territory

The ~20-minute video allowed reps to complete training quickly and at their convenience—no classroom time required.



High Training Impact on a Modest Budget

A cost-effective format that stayed within budget while building strong pre-launch confidence.

“The training was simple, targeted, and effective—exactly what we needed without overextending our resources or budget.”

“The team felt confident and prepared without needing multiple hours of live training.”

– Training Lead

Why It Worked

This project succeeded because LPW combined platform expertise with a streamlined, role-specific approach that delivered exactly what the field needed.

Strategic Partnership

LPW collaborated closely with the Biotech team from planning through delivery, ensuring every element of the training was aligned with organizational priorities, field needs, and the overall goal of efficiency.

Platform Expertise

Our proven experience with both Veeva CRM and Vault CRM allowed us to quickly identify and focus on the updates that mattered most, avoiding unnecessary detail and keeping the training sharp and relevant.

Role-Relevant Design

By branching the content for Sales and Medical teams, we delivered targeted, role-specific workflows that spoke directly to each audience's daily responsibilities, increasing engagement and retention.

Value Maximization

We produced a single, high-quality training video that served both audiences—maximizing the client's budget while still delivering impactful, role-specific content without compromising on quality or clarity.

WANT A HIGH-IMPACT VAULT CRM TRAINING STRATEGY THAT FITS YOUR BUDGET?

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