

Revolutionizing the Pharmaceutical Industry with Salesforce Life Sciences Cloud

CriticalRiver helps pharma companies operationalize trust and compliance through intelligent, connected data ecosystems built on Salesforce.



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The Life Sciences Landscape: From Volume to Value

The global pharmaceutical industry is undergoing a profound transformation, moving from a volume-driven model focused on scale and production, to a value-driven model centered on patient outcomes, regulatory transparency, and data-driven decision-making. In this new paradigm, digital ecosystems like Salesforce Life Sciences Cloud act as the connective tissue linking research, commercialization, compliance, and customer success. As organizations embrace this shift, the ability to unify data across clinical, commercial, and operational silos becomes critical. Intelligent platforms, powered by AI and automation, are now essential for building agility, fostering innovation, and ensuring trust across the value chain.

Overview

This document outlines:

- The current challenges faced by the life sciences and pharmaceutical industry,
- How Salesforce Life Sciences Cloud addresses these challenges, and
- How CriticalRiver's solutions have helped customers overcome them.

Industry Segmentation

The Life Sciences industry comprises several key stakeholders, each playing a critical role in delivering, regulating, or supporting healthcare and pharmaceutical services.

Patients / Consumers: The ultimate users of care; their data is stored, processed, and used responsibly.

Payers / Insurers: Payers who reimburse services; use data for claims, risk stratification, analytics.

Healthcare Providers (Clinicians, Hospitals, Clinics, Labs, etc.): They deliver care and use the system to record, analyze, and coordinate patient data.

Pharmaceutical Companies: Discover, develop, produce, and market medications.

Regulators & Government Agencies: Set rules, standards, policies (data protection, health information exchange, compliance).

Med-Tech: Develop and manufacture medical devices, diagnostic equipment, and health technology.



This white paper explores the key challenges faced by pharmaceuticals companies and how Salesforce provides effective solutions to address them.

Challenges for Pharmaceutical Companies

The pharmaceutical sector operates through two principal business segments: Active Pharmaceutical Ingredients (APIs) and Formulations. APIs constitute the raw, unprocessed substances, typically in powder or liquid form, used in the production of medications, whereas Formulations represent the final, finished pharmaceutical products intended for end-user consumption.

Outlined below are the key challenges currently faced by most pharmaceutical companies:

- Fragmented data sources
- Lack of pre-sales activity tracking
- Regulatory compliance and data security challenges (e.g., HIPAA, GDPR)
- Manual and error-prone approval processes, often resulting in missing or inaccurate information
- Inefficient tracking of budget versus actual performance



The following section dives deeper into each problem:

Fragmented Data Sources

Currently, around 70% of pharmaceutical applications remain unintegrated, leading to siloed systems that cause inefficiencies, duplicate efforts, and hinder collaboration across the organization. This lack of integration significantly slows down the process of obtaining accurate business statistics, often leading to time-consuming and error-prone data analysis. Such fragmentation limits the ability of teams to work cohesively and make informed decisions based on comprehensive insights.

Lack of Pre-Sales Activity Tracking

- Currently, there is no centralized platform to monitor activities, meeting updates (Minutes of Meeting), or the pipeline of ongoing discussions across different geographies and business units.
- Summarizing meeting minutes and identifying subsequent action items consumes a significant amount of time.
- Managers and leaders lack clear visibility into the actions and progress of Account Executives reporting to them.
- There is no efficient system to track quotations sent to customers. When employees leave the organization, historical account and quotation data often become inaccessible.

Regulatory Complexity and Data Security

Compliance with global regulations such as **GDPR**, and **HIPAA** demands rigorous data handling and audit trails. Compliance is challenging since data is scattered across disconnected systems, making it difficult to monitor data access and maintain proper audit trails.

Manual Approval processes

- There is no automated approval process in place; teams rely on manual methods, such as scanning documents and sending them via email for approvals, which is ineffective and time consuming. This also induces loss of important information or inaccuracies.
- Approvers lack access to essential information, such as customer outstanding balances and past sales price data, during the approval process, leading to uninformed or inconsistent decisions.

Inefficient Budget vs. Actual Tracking

- There is no effective system to monitor budget versus actual performance in real time across accounts, products, and regions. Collecting this data involves significant manual work and often lacks accuracy due to the absence of a centralized platform and appropriate tools.
- No transparency in product delivery plans scheduled over the next year, making it challenging to manage expectations and ensure timely fulfillment.
- Management lacks visibility in product white space, making it difficult to identify trends and pinpoint the areas that require focus.

Salesforce Life Sciences Cloud Capabilities

Salesforce's Life Sciences Cloud is built to address these challenges head-on, delivering a secure, AI- powered CRM platform tailored for pharma companies.

The following section explores how Salesforce Life Sciences Cloud effectively addresses these challenges.

Pre-Sale Activities

Salesforce enables pharmaceutical sales and marketing teams to manage customers, contact and product data. It facilitates effective pipeline, activity and quotation management. AI and Einstein conversation insights help to summarize meetings and suggest next steps. By streamlining communication and collaboration, the cloud boosts engagement and ultimately drives improved sales outcomes.

Collaboration and Analytics

The cloud makes it easier for teams, across Sales manufacturing, and commercials to work together by providing shared access to data and tools. Built-in analytics tools help uncover trends, predict outcomes, and support data-driven decisions, improving overall productivity and innovation.

Approvals and Historical data

Salesforce includes built-in automation tools that enable organizations to handle record approvals in a consistent and systematic manner.

Additionally, its AI and agentic capabilities help users access historical data, including pricing and past-due information.

Integrations

Life Sciences Cloud platforms can integrate with other business systems such as ERP, CRM, and healthcare databases. This ensures seamless data flow across departments, reduces duplication of effort, and establishes a single source of truth for all operations.

Regulatory Complexity and Data Security

Life Sciences Cloud meets regulatory and data security requirements by supporting key standards such as HIPAA and GDPR. It provides robust capabilities, including audit trails, electronic signature integrations, and system validation tools. Data security is maintained through encryption, role-based access controls, multi-factor authentication (MFA), and event monitoring. Salesforce Shield further enhances compliance with features like Field Audit Trail and Platform Encryption.

Budget Vs. Actual

The Life Sciences Cloud's sales agreements and advanced account forecasting capabilities enable businesses to track long-term customer commitments effectively. This is especially beneficial in manufacturing, where recurring orders and contracts are frequent. The advanced forecasting tools allow manufacturers to create projections based on various factors such as customer, region, and product, while also providing visibility into actual performance compared to budget.



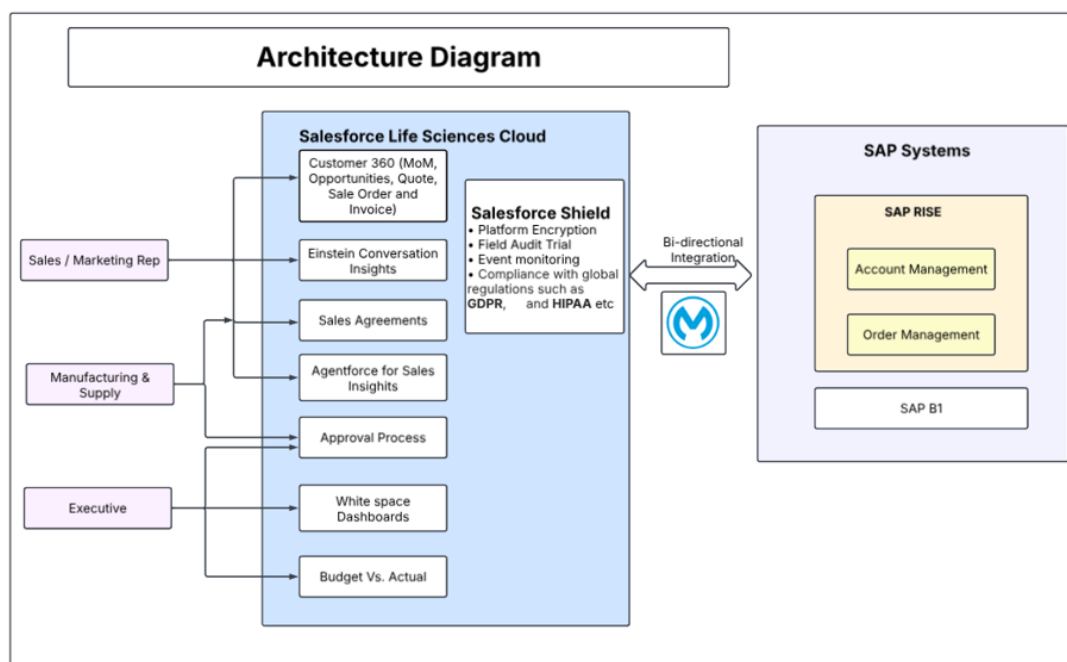
Following section explores how CriticalRiver addressed business challenges by leveraging Salesforce Life Sciences Cloud.

Strategic Salesforce Life Sciences Cloud Partnership for a Leading Pharma Company

CriticalRiver goes beyond traditional system integration. We act as a strategic transformation partner, helping life sciences organizations unify complex data ecosystems, automate regulated processes, and create connected, compliant operations. Our deep Salesforce expertise, coupled with domain understanding of regulated industries like pharma, enables us to deliver solutions that are secure, intelligent, and purpose-built for real-world impact, driving measurable outcomes in efficiency, compliance, and customer experience.

- Developed a robust account setup process that enables API and Formulations users to securely access their accounts while improving data visibility and strengthening security.
- Integrated SAP and Salesforce to enable bidirectional data synchronization.
- Configured opportunity management to monitor the entire commercialization process, including sampling, trial evaluations, and the registration process.
- Set up pre-designed quotation templates and established a quote workflow to monitor the quote status.
- Developed a dynamic approval process to replace manual workflows and improve decision-making efficiency.
- Developed a user interface to display customers' past-due amounts, supporting better-informed approval decisions.
- Deployed Einstein Conversation Insights to:
 - Analyze sales calls using AI
 - Extract key information and summarize discussions
 - Generate meeting minutes with actionable next steps and draft follow-up emails
- Deployed Agentforce to:
 - Gain insights into sales performance
 - Track historical and ongoing activities related to customers and opportunities
 - Access previous sales order data and pricing
 - Summarize account information and send updates
- Developed a Product Whitespace dashboard to display the current stage of each product in relation to its respective customer.
- Configured advanced account-level forecasting and analytics to monitor actual business performance against budget across multiple dimensions, such as account, product, region, and plant, enabling users and management to track sales targets, identify gaps, and make informed decisions.
- Set up sales agreements to display planned delivery schedules by product and time for each customer.
- Enabled a mobile application for API and Formulations teams to easily track customer activities and engagements on the go.

Solution Architecture Overview



Outcomes

Problem (from current state)	Tangible Outcome
Fragmented data	5% increase in business growth. Single source of truth, fewer manual reconciliations, faster, more accurate reporting.
Lack of pre-sales activity tracking & MoM	20% increase in sales team productivity; automated MoM & follow-ups; end-to-end visibility across geos/BUs.
Regulatory compliance & data security	100% increase in compliance as the entire data is in the system and there is no data loss.
Manual approvals via email or scans	20% improvement in deal closing time due to faster approval cycle, consistent decisions and fewer errors.
Inefficient budget vs. actual tracking	5% increase in business growth by real-time exec dashboards and whitespace identification.
Limited visibility into delivery schedules	20% increase in customer satisfaction through on-time fulfilment.

“The CriticalRiver team played a key role in the Salesforce program for our API business. Their understanding of our complex business model and expectations from Salesforce was remarkable. The tailored solution they delivered will help us make better decisions and nurture future projects.”

— VP, International Marketing, Leading Global Pharmaceutical Firm

What Sets CriticalRiver Apart

CriticalRiver's distinction lies not just in our ability to deploy Salesforce Life Sciences Cloud, but in how we strategically architect unified, intelligent ecosystems that bridge the gap between compliance, operations, and sales-centric outcomes.

Our strength is in building connected value networks where data integrity, auditability, and actionable insights power better decisions, enabling pharmaceutical companies to innovate confidently in a highly regulated environment.

Conclusion

The Healthcare and life sciences industry faces significant challenges such as fragmented data sources, regulatory complexity, manual approval processes, and inefficient budget tracking. Salesforce Life Sciences Cloud addresses these issues by providing a unified, secure, and AI-powered platform tailored to the industry's unique needs. Through enhanced collaboration, automation, real-time analytics, and seamless integrations, Salesforce empowers pharmaceutical companies to streamline operations, improve compliance, and drive better business outcomes.

CriticalRiver's partnership and strategic enablement of Salesforce Life Sciences Cloud demonstrates how these capabilities translate into tangible benefits, offering improved visibility, Data Integrity, efficiency, and effective decision-making for sales teams, managers, and executives alike. Ultimately, adopting Salesforce Life Sciences Cloud revolutionizes pharmaceutical sales and marketing operations by enabling companies to innovate, collaborate, and compete effectively in a rapidly evolving industry landscape.

If your organization is looking to move beyond disconnected systems and compliance bottlenecks, partner with CriticalRiver to build a unified digital ecosystem that transforms how your teams operate, collaborate, and grow. Let's build the future of connected, compliant, and data-driven life sciences, together.

Ready to take the next step in your Salesforce journey?

Connect with the Team

Meet Our Team



Andre Lepine

Head of Salesforce Business Development

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Andre serves as Head of Salesforce Business Development at CriticalRiver Inc., where he helps clients unlock the full potential of Salesforce to drive revenue growth and operational excellence. With more than 15 years of experience in the Salesforce ecosystem, Andre has guided global enterprises through large-scale digital transformations, collaborating closely with Salesforce and client teams to design and deliver cross-cloud strategies that accelerate business impact and deliver measurable outcomes through trusted partnerships and value-driven solutions.

Recognized for his consultative approach and ability to align technology with business goals, Andre empowers organizations to achieve long-term, scalable growth.



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Sravana serves as a Technical Program Manager at CriticalRiver Inc., where she leads complex Salesforce implementations that drive measurable business value for global pharmaceutical clients. With over 14 years of professional experience, including more than 9 years specializing in Salesforce, she brings deep expertise across multiple Salesforce Industry Clouds.

A proven technology leader, Sravana has successfully delivered large-scale, greenfield Salesforce programs, collaborating closely with Salesforce and client teams to design and implement scalable, cross-cloud strategies that accelerate business impact. Recognized for her strategic mindset and commitment to excellence, she consistently achieves outstanding customer satisfaction and long-term success for her clients.

References:

- [Set Up Agentforce](#)
- [Life Sciences Cloud | Data Model Gallery | Salesforce Developers](#)
- [Einstein Conversation Insights](#)
- [Manufacturing Cloud | Data Model Gallery | Salesforce Developers](#)

About CriticalRiver Inc.

Company URL: <https://www.criticalriver.com/>

CriticalRiver Inc. is an AI-first technology services firm focused on accelerating business outcomes through speed, agility, and innovation. Our team of Investigators, Builders, and Imagineers delivers bite-size, outcome-based pathways to maximize returns on innovation investments.

We help enterprises get more from what they already run, optimizing existing systems for higher ROI, automating manual workflows, and deploying pre-built vertical solutions for faster value realization. We also design and build new platforms powered by agentic AI to accelerate development and delivery cycles.

Founded in 2014 and headquartered in Pleasanton, California, CriticalRiver supports a global client base with deep expertise in machine learning, predictive analytics, and intelligent automation, enabling organizations to adopt emerging technologies while preserving long-term operational value.

Our commitment to people and performance is reflected in our seven-time Great Place to Work® certification and our recent achievement of CMMI Level 3 for Development and Services.

Corporate Headquarters:
Pleasanton, California, United States

Global Presence:
USA, India, UAE, Australia, Philippines, Brazil, and Costa Rica

