



Key Features Checklist:

What to Look for in a
Pharma CRM?



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Introduction

In today's complex pharmaceutical landscape, selecting the right **Customer Relationship Management (CRM)** system is no longer just an IT decision—it's a strategic business imperative. What specific challenges does your pharma sales team face when engaging with healthcare professionals? Are your marketing efforts delivering measurable results? Can your current systems ensure compliance while still enabling efficient operations?

The pharmaceutical industry operates under unique constraints and requirements that generic **CRM solutions** often fail to address. From maintaining accurate HCP databases to navigating strict regulatory frameworks, pharma companies need specialized tools designed for their specific needs. A purpose-built **pharma CRM** doesn't just track customer interactions—it transforms how your teams engage with healthcare professionals, optimize territories, analyze performance, and ensure compliance.

Introduction

This checklist serves as your guide to evaluating pharma **CRM solutions**, highlighting the ESSENTIAL FEATURES that separate industry-leading platforms from generic alternatives. By systematically assessing each capability against your organization's needs, you'll be equipped to make an informed decision that drives sales effectiveness, marketing impact, and regulatory compliance.

Essential functionalities checklist that a robust pharma CRM should offer:

This section will guide you through the essential functionalities that a robust **pharma CRM** should offer.

Core Functionalities

- ✓ **HCP Database Integration:** to ensure sales and marketing teams have the latest, most accurate healthcare professional data.
- ✓ **IQVIA OneKey Integration:** Access to comprehensive HCP profiles, including specialties, affiliations, and prescribing habits.
- ✓ **Axioma Integration:** For additional market insights and HCP data in specific regions.
- ✓ **Custom Database Integration:** Ability to integrate with proprietary or local HCP databases.

Omnichannel Communication (OCM + CLM)

In the digital age, **HCPs** expect multichannel engagement. A modern **pharma CRM** should unify those channels for consistent messaging and a seamless experience.



Sales Planning & Territory Management

Effective territory management is crucial for optimizing sales performance.

Look for features such as:

- ✓ **GeoForce Integration:** For advanced geographical targeting and route optimization.
- ✓ **PAS (Sales Plan Allocation System):** To align sales efforts with **HCP preferences** and needs.
- ✓ **Territory Mapping:** Visual tools for defining and managing sales territories.
- ✓ **Call Planning:** Intelligent suggestions for **HCP visits** based on priority and potential.

Automated Reporting & Analytics

Data-driven decision-making is key in the pharmaceutical industry.

Your **CRM** should offer:

- ✓ **Real-time Dashboards:** For instant insights into sales performance, HCP engagement, and more.
- ✓ **Customizable Reports:** To track KPIs specific to your business needs.
- ✓ **Predictive Analytics:** To forecast trends and identify opportunities.
- ✓ **Powered Insights:** For advanced data analysis and recommendations.

Closed-Loop Marketing (CLM)

CLM is essential for measuring and optimizing marketing efforts in the pharmaceutical industry. Look for:

- ✔ **Content Management:** To organize and distribute marketing materials.
- ✔ **Engagement Tracking:** To measure HCP interactions with content.
- ✔ **Feedback Loop:** To refine marketing strategies based on HCP responses.
- ✔ **Multichannel Campaign Management:** To orchestrate campaigns across various platforms.

Compliance is non-negotiable in the pharmaceutical industry. Ensure your **CRM** offers:

GDPR, HIPAA, ISO 27001 Compliance

- ✔ **Data Protection Measures:** To safeguard sensitive HCP and patient information.
- ✔ **Consent Management:** To track and manage HCP communication preferences.
- ✔ **Audit Trails:** To monitor and record all data access and changes.
- ✔ **Regular Compliance Updates:** To stay current with evolving regulations.



Secure Cloud Hosting

- ✓ **AWS or Azure Hosting Options:** For reliable, scalable cloud infrastructure.
- ✓ **Private Cloud Options:** For companies with specific security requirements.
- ✓ **Regular Security Audits:** To ensure ongoing protection against threats.

Data Encryption & User Access Management

- ✓ **End-to-End Encryption:** To protect data in transit and at rest.
- ✓ **Role-Based Access Control:** To ensure users only access information relevant to their roles.
- ✓ **Multi-Factor Authentication:** For enhanced login security.
- ✓ **Single Sign-On (SSO) Integration:** For seamless and secure access across platforms.



Unique processes and needs your CRM should be adaptable:

Low-Code Configuration & Adaptability

- ✓ **Visual Process Builders:** To create custom workflows without coding.
- ✓ **Drag-and-Drop Interface Customization:** To tailor the CRM to your team's needs.
- ✓ **Custom Field Creation:** To capture data specific to your business.

Custom Workflows & Automated Approvals

- ✓ **Workflow Automation:** To streamline repetitive tasks and processes.
- ✓ **Approval Chains:** For compliant review and approval of materials and actions.
- ✓ **Trigger-Based Actions:** To automate responses to specific events or conditions.



Integration with Existing Pharma Tech Stack

- ✓ **API Availability:** For seamless integration with other systems.
- ✓ **Pre-built Connectors:** For common pharma applications and databases.
- ✓ **Data Import/Export Tools:** For easy data migration and synchronization.

User-Friendly UI for Sales Reps & Managers

- ✓ **Intuitive Navigation:** For quick access to essential features.
- ✓ **Customizable Dashboards:** To display relevant information for each user role.
- ✓ **Mobile-First Design:** For easy use on tablets and smartphones.



Mobile & Tablet Accessibility

- ✓ **Native Mobile Apps:** For iOS and Android devices.
- ✓ **Offline Mode:** To work without an internet connection.
- ✓ **Touch-Optimized Interface:** For easy use on tablets during HCP visits.

Multilingual Support

- ✓ **Interface Localization:** To support users in different regions.
- ✓ **Content Translation Tools:** For managing multilingual marketing materials.
- ✓ **Language-Specific Reporting:** To generate reports in local languages.

By ensuring that your chosen **CRM** checks all these boxes, you'll be well-equipped to meet the unique challenges of the pharmaceutical industry.

Conclusion: Selecting the right CRM for your pharmaceutical organization requires careful evaluation

As this checklist demonstrates, an effective **pharma CRM** goes far beyond basic contact management—it integrates specialized healthcare databases, enables compliant omnichannel engagement, optimizes territory management, delivers actionable analytics, and adapts to your unique processes.

The right **CRM** becomes the operational backbone of your commercial teams, connecting data, processes, and people across your organization. By ensuring your selected platform includes the features outlined in this checklist, you position your company to navigate the evolving healthcare landscape with greater agility and insight.



The pharmaceutical industry will continue to face changing regulations, evolving HCP expectations, and increasing competition. A robust, purpose-built **CRM system** provides the foundation needed to adapt to these changes while maintaining compliant, effective engagement with your key stakeholders.

Ready to experience a **CRM** designed specifically for pharmaceutical companies?

Try a Free Trial of Proxima Cloud CRM and discover how these features can transform your commercial operations.



 Try a Free Trial of Proxima Cloud CRM

Take the Next Step

Proxima Cloud CRM addresses the unique challenges of pharmaceutical sales and marketing with purpose-built solutions for:

- ✓ Industry-specific workflows
- ✓ Regulatory compliance (GDPR, HIPAA, ISO 27001)
- ✓ Seamless omnichannel engagement
- ✓ Integration with key healthcare databases
- ✓ Intuitive interfaces that drive adoption

Experience the difference firsthand.

Contact us at connect@proximacloudcrm.com to schedule your personalized demonstration.

Your success in tomorrow's pharmaceutical market begins with the right **CRM** decision today.

