

CRM Migration Partner Brief

Prepared for Meridian Biosciences
24 August 2026

This is a structured scoping brief for a CRM migration to HubSpot. Please review the project overview and scope below, and respond with the items requested in 'What we need from you' at the end of this document.

Project overview

Meridian Biosciences, a life sciences & biotech organisation with 251–1,000 employees, currently runs Salesforce and is planning a migration to HubSpot. The primary objective is better reporting & data quality. Sales and clinical operations teams work from separate systems, so leadership has no single view of pipeline health or renewal risk across regions. Success within six months looks like: A single pipeline view leadership trusts, and renewal risk visible at least one quarter ahead.

Prioritisation (MoSCoW)

MUST HAVE

Better reporting & visibility, Broader integration capability, Compliance & audit-trail requirements, Finance / accounting integration, ERP integration, Parent-child account hierarchy

SHOULD HAVE

Strong user adoption from day one, Website & forms integration

COULD HAVE

Support / ticketing integration

WON'T HAVE (THIS PHASE)

Mobile access for field/remote teams

Scoping brief

MIGRATION PATH

CURRENT SYSTEM	Salesforce
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What Salesforce customisations, workflows or integrations would need to be replicated?

Custom approval workflows for regulated document sign-off, and a bespoke integration with our LIMS system for sample tracking.

ORGANISATIONAL CONTEXT

SECTOR	Life Sciences & Biotech
ORGANISATION SIZE	251–1,000 employees
PRIMARY OBJECTIVE	Better reporting & data quality
CURRENT LIMITATIONS	Poor reporting & visibility, Limited integrations, Low user adoption, Compliance & audit-trail requirements
SUCCESS CRITERIA (6 MONTHS)	A single pipeline view leadership trusts, and renewal risk visible at least one quarter ahead.

TARGET CRM REQUIREMENTS

USERS	Sales, Customer service, Leadership / reporting
INTEGRATIONS	Finance / accounting, ERP, Website & forms, Support / ticketing
NAMED SYSTEMS	M3 ERP, Power BI, Microsoft 365 / Outlook
ACCOUNT HIERARCHY NEEDED	Yes, we need parent-child account relationships
REPORTING & KPI REQUIREMENTS	Sales and gross margin by brand, distribution growth, and NPD placement performance.
ROLLOUT APPROACH	Phased — core CRM first, extensions later
BUDGET	Not yet decided

IT & GOVERNANCE

Contacts & companies to migrate

250,000+

COMPLIANCE & SECURITY	GDPR, ISO 27001, Sector-specific regulation (e.g. FCA, MHRA)
INTERNAL IT RESOURCE	Reliant on the implementation partner
CONFIGURATION PREFERENCE	Expect significant customisation

DELIVERY & SIGN-OFF

SIGN-OFF	Full board / procurement process
TIMESCALE	ASAP (within 3 months)
DECISION TIMELINE	Within a month
ROADBLOCKS	Procurement process typically takes 8-10 weeks and hasn't formally started yet.

CONTACT

NAME	Sarah Whitfield
EMAIL	sarah.whitfield@meridianbiosciences.co.uk
ORGANISATION	Meridian Biosciences
PHONE	+44 7700 900123
OTHER STAKEHOLDERS	James Carter (IT Director), Priya Anand (Procurement Lead)

What we need from you

Please include in your response:

- Your process for responding to a brief like this, for example whether you can share an indicative view directly or would want a scoping call first
- Proposed project timeline and delivery methodology, once engaged
- Team composition, including relevant HubSpot accreditations
- Two comparable case studies, ideally in Life Sciences & Biotech or a similar sector
- Indicative pricing approach, and what's included in that price
- How they would approach the specific challenges outlined in this brief

Please also address the following, specific to our situation:

- Which accreditations does your team hold that are directly relevant to GDPR, ISO 27001, Sector-specific regulation (e.g. FCA, MHRA)?
- Given our limited internal IT resource, what ongoing governance support do you provide after go-live, not just during implementation?
- Can you show a comparable project with a similar number of integrations, and how did data migration testing work?
- What's your approach to migrating and validating a dataset of this size?

HOW TO RESPOND

Let us know how you'd like to proceed, for example whether you can share an indicative view directly or would prefer a call first. We're hoping to hear from you within a month. Flag anything you'd need clarified to respond accurately.