

CRM Migration Readiness Internal Report

Prepared for Meridian Biosciences
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How to use this report

At its core, this assessment is designed to indicate how likely this CRM migration is to succeed or stall, not simply to restate the information you've provided.

Industry research puts CRM implementation failure rates between 30% and 70% depending on methodology, with more than 60% of failures attributed to people and adoption factors rather than the technology itself.

Use this report as guidance on what to do to set the foundation for a successful CRM migration. The risk register and mitigations below are the specific actions worth taking before you brief any implementation partner.

METHODOLOGY

Risk and change-readiness analysis in this report applies BabelQuest's own frameworks, built from direct experience across hundreds of CRM migrations and validated by our consulting team.

Executive summary

Meridian Biosciences is assessing a move from Salesforce in life sciences & biotech. The primary objective is "Better reporting & data quality", with low user adoption identified as the leading operational constraint today.

Readiness score

100

Ready to move, overall readiness signal, out of 100

Commercial		25/25
Governance		25/25
Technical		25/25
Organisational		25/25

This score reflects whether budget, sign-off, resourcing and timeline are decided, not overall project risk. A high score can still carry high-severity risks, check the register below regardless of your score.

Change readiness

ALIGNED ACROSS TIERS

RECOMMENDED NEXT STEP

Budget, sign-off, resourcing and timeline are all decided, but the risk register below still flags at least one high-severity item. Resolve that first. Being decided isn't the same as being low-risk, and this is exactly the kind of thing worth sorting before you brief partners.

Risk register

- HIGH

Adoption problems rarely come from the software itself, they usually trace back to mismatched configurations and processes not aligning with the team's day-to-day.

MITIGATION

Involve a small group of frontline users and managers in configuration decisions before rollout, not just training after the fact.
- HIGH

Expecting significant customisation alongside a complex data model (large data volumes, multiple integrations, or account hierarchies) compounds cost and timeline risk substantially. This needs particular attention here, since the migration is coming from Salesforce, where deep customisation and custom objects are common and need to be properly understood before they're replicated.

MITIGATION

Make sure any partner you brief fully understands the complexity of your data model before pricing or timeline commitments are made. Ask them to walk through specifically how they'd replicate your configuration, not just confirm that it's possible.
- MEDIUM

A high number of integrations usually makes data migration the single biggest driver of timeline and cost — worth scoping this in detail before committing to a date.

MITIGATION

Ask prospective partners for a dedicated data migration and testing plan as a separate line item, not folded into general implementation.

MEDIUM

Large data volumes combined with multiple integrations typically extend the migration and testing phase beyond a standard timeline.

MITIGATION

Build in a dedicated data validation phase before go-live rather than testing live in production.

MEDIUM

Parent-child account relationships (for example, distributor-to-retailer hierarchies) aren't native to HubSpot the way they are in some other CRMs — this typically needs a deliberate data model decision early, not a default configuration.

MITIGATION

Ask prospective partners specifically how they'd model account hierarchies in HubSpot, and ask to see an example from a comparable implementation.

LOW

Life sciences organisations usually need auditability built into the CRM from day one, not retrofitted after adoption.

MITIGATION

Raise this explicitly when briefing partners, since it shapes how they'd configure the platform.

BENCHMARK CONTEXT

Comparable life sciences organisations typically treat this as a long-term platform relationship rather than a single implementation, given ongoing compliance and audit requirements.

Organisations scoring in this band typically move to a scoped implementation plan within a few weeks of an assessment like this one.