OMNITEK CONSULTING

Platform Sprawl and the Case for Consolidation

WHITE PAPER

A Framework for Diagnosing When Best of Breed Became Too Many Logins

Abstract

Most life sciences commercial and clinical technology stacks were not designed. They accumulated, one point solution at a time, until an organization that set out to buy the best tool for every job woke up managing hundreds of them. The average enterprise now runs somewhere between 100 and 300 SaaS applications, up from fewer than 20 less than a decade ago, and the average organization wastes over $135,000 a year on licenses nobody uses. Seventy percent of technology leaders now plan to consolidate their vendor landscape, and life sciences companies face a forcing function the broader market does not: Veeva's split from Salesforce has put a hard 2030 deadline on a CRM migration decision that is really a referendum on the whole commercial stack. This white paper lays out a best-practices-based framework for deciding when platform sprawl has become a genuine liability, which systems actually warrant consolidation, and how to execute that consolidation without disrupting the regulated, validated processes life sciences technology has to protect.

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Best of Breed Became Too Many Logins

Every individual technology decision that created today's sprawl probably made sense in isolation. Commercial bought a CRM. Medical affairs bought a literature surveillance tool. Regulatory bought a submissions platform. Clinical operations bought a CTMS, then an eTMF, then an IRT system from a different vendor because it had better randomization logic. Each purchase solved a real problem, cleared procurement, and got adopted by the team that requested it. Nobody was in charge of the sum.

The sum has gotten large. Organizations now run an average of 100 to 300 SaaS applications, a figure that has grown from fewer than 20 applications less than ten years ago.[i] The average company wastes more than $135,000 annually on licenses that go unused, and that number climbs past $21 million a year at large enterprises.[i] Shadow IT, meaning tools acquired outside any formal review, now accounts for roughly a third of the applications running inside a typical organization, which means even the inventory problem is bigger than most IT and procurement functions can currently see.[i]

Technology leadership has noticed. Sixty-eight percent of CIOs surveyed in recent research now plan to actively consolidate their vendor landscape, most targeting a reduction of roughly one-fifth of their current vendor count, and Gartner projects that seventy percent of organizations will narrow their cloud-native application vendors down to three or fewer by 2027.[ii] Life sciences has its own specific catalyst pushing in the same direction. Veeva's 2022 decision to end its fifteen-year partnership with Salesforce and move its CRM to its own Vault infrastructure gave every pharma company running Veeva CRM on Salesforce a hard deadline: full migration by September 2030, with a five-year window that industry observers already warn will create capacity bottlenecks for companies that wait.[iii] That deadline has turned what looked like a routine CRM upgrade into a genuine referendum on the rest of the commercial stack.

Sprawl Is Not the Same Problem as Complexity

It helps to be precise about what is actually being diagnosed, because platform sprawl and legitimate system complexity get treated as the same problem when they are not. A global life sciences company with distinct commercial, clinical, and regulatory functions genuinely needs different systems for different regulated purposes. A validated eTMF is not interchangeable with a CTMS, and trying to force one system to do both jobs usually produces a worse outcome than running two systems well. That is complexity the business actually requires.

Sprawl is different. It is redundant systems doing the same job for different teams because nobody made them share one. It is shelfware still being paid for because the renewal auto-processed and nobody flagged it. It is three regional teams running three different versions of the same category of tool because a global standard was never enforced. It is shadow IT that IT does not know exists, procured on a department credit card and never brought into a validated environment. None of that is complexity in service of a real requirement. It is accumulated decisions nobody revisited.

The distinction matters because the wrong diagnosis leads to the wrong fix. An organization that treats legitimate complexity as sprawl ends up forcing an ill-fitting single platform onto functions with genuinely different needs, and it usually finds out the hard way, mid-implementation, why those functions bought different tools in the first place. An organization that treats real sprawl as necessary complexity keeps paying for it indefinitely, telling itself that consolidation would be too disruptive to attempt.

A Framework for Deciding What to Consolidate

Consolidation programs that hold up under regulatory scrutiny share a common structure: a disciplined way to tell the difference between sprawl worth fixing and complexity worth keeping, paired with a way to execute the fix without breaking anything a regulator, auditor, or clinical trial depends on. That structure runs on five components.

1. **Footprint Inventory.** A true accounting of every system in use, including the shadow IT that formal asset management usually misses, tagged by function, owner, validation status, and renewal date. Most organizations that run this exercise for the first time find fifteen to thirty percent more applications than their official system-of-record inventory shows.
2. **Redundancy and Value-at-Risk Scoring.** Every system gets scored on two axes: how much genuine, non-overlapping value it delivers, and how much risk a change to it carries, whether regulatory, operational, or data-related. A validated CTMS holding active trial data scores very differently than a marketing team's unsanctioned survey tool, even if both showed up as one line item in the footprint inventory.
3. **Consolidation Path Design.** For each system flagged as a consolidation candidate, a specific path: retire outright, migrate its function into an existing platform, or replatform onto a new one, as the Veeva Vault CRM transition is forcing many commercial organizations to evaluate right now. The path decision should follow the value-at-risk score, not vendor sales pressure or whichever option requires the least short-term effort.
4. **Data and Validation Continuity Planning.** The step that separates a life sciences consolidation from a typical enterprise IT project. Migrating a validated system means proving the receiving system produces equivalent, defensible results, not just that the data moved. This has to be planned before cutover, not discovered during it.
5. **Re-Sprawl Governance.** A standing intake process for new technology requests that checks the footprint inventory before approving a new purchase, so the organization does not spend eighteen months consolidating only to rebuild the same sprawl three years later through the same uncoordinated, function-by-function buying pattern that created it the first time.

The output of this framework is not a mandate to consolidate everything. Some of what looks like sprawl on a spreadsheet is complexity the business genuinely needs, and a well-run process protects that as deliberately as it targets what should go.

What Consolidation Buys, and What It Risks

Advantages

- **Real cost recovery:** Eliminating redundant licenses and unused seats is the fastest, lowest-risk win available, and organizations running unified platforms report cutting system management and maintenance time by up to seventy percent.[ii]
- **Faster integration work going forward:** Fewer systems means fewer point-to-point integrations to maintain, with unified solutions cutting the time and effort to build new integrations by twenty-five to fifty percent.[ii]
- **A single, trustworthy source of truth:** Consolidated platforms reduce the reconciliation work that eats into every cross-functional reporting cycle, from portfolio dashboards to inspection readiness.

- **Lower validation burden over time:** Fewer validated systems means fewer systems requiring periodic revalidation, change control review, and audit preparation, freeing quality and compliance capacity for higher-value work.

Risks and Barriers

- **Forced-fit platforms:** Consolidating for its own sake, without honestly scoring whether a function's requirements actually overlap with another team's, produces a platform that satisfies nobody as well as their previous dedicated tool did.
- **Validation and data integrity exposure during cutover:** Migrating a regulated system carries genuine compliance risk if data mapping, equivalence testing, and cutover sequencing are not planned with the same rigor as the original system validation.
- **Change fatigue and adoption resistance:** Teams that have used a tool for years resist losing it, and forced migrations without a clear value case for end users tend to produce workarounds and shadow IT rather than genuine adoption.
- **Vendor timeline pressure:** The Veeva-to-Vault deadline and similar forcing functions can push organizations into rushed decisions made to beat a date rather than to fit an actual strategy, which tends to recreate sprawl in a new form rather than eliminate it.

Case in Point: A CRM Deadline That Became a Portfolio Review

A mid-size specialty biopharma facing the Veeva CRM migration deadline initially scoped the project as a straightforward platform swap: move from Veeva CRM on Salesforce to Vault CRM, keep everything else the same. A footprint inventory run alongside that planning surfaced something the original scope had missed. The commercial organization was running four separate call-reporting and sample-tracking tools across different regions, none of which fed the CRM directly, all of which had been procured independently over the prior six years as regional teams solved the same problem in isolation.

Treating the mandatory CRM migration as the trigger to also retire the three redundant regional tools, rather than migrating the CRM in isolation and leaving the rest of the sprawl untouched, added roughly ten weeks to the project timeline. It also eliminated four annual license renewals, removed three sets of duplicate data entry that field teams had been quietly complaining about for years, and gave commercial leadership a single, real-time view of field activity for the first time. Trade press coverage of similar Vault CRM transitions has noted the same pattern: companies treating the migration purely as a technical swap tend to under-realize the opportunity sitting next to it, while companies that use the forced deadline as a review point get more value out of the same mandatory project.

Not every mandatory migration hides that much opportunity. But the habit of asking the broader consolidation question whenever a system is already being touched, rather than only during a dedicated transformation initiative, is what separates organizations that make steady progress against sprawl from those that only address it once a decade during a disruptive, all-at-once overhaul.

Recommendations for Technology and Business Leaders

1. **Run the footprint inventory before scoping any consolidation project.** Include shadow IT explicitly. Most organizations are managing more systems than their official inventory shows, and a consolidation plan built on an incomplete inventory will miss real opportunity.
2. **Score every system on value and risk before deciding its fate.** Resist the instinct to consolidate everything that looks redundant on paper. Some apparent duplication is legitimate complexity a diverse, regulated business genuinely needs.
3. **Use mandatory migrations as review points, not isolated projects.** A forced deadline, like the Veeva Vault transition, is an opportunity to ask the broader consolidation question while a system is already being touched, not just a technical swap to execute as narrowly as possible.
4. **Plan data and validation continuity before cutover, not during it.** Prove equivalence between the old and new system's outputs as part of the planning phase for any regulated system, with quality and compliance involved from day one rather than brought in to sign off at the end.
5. **Build a re-sprawl gate into procurement.** Require any new technology request to be checked against the current footprint inventory before approval, so consolidation gains do not erode within a few years through the same uncoordinated buying pattern that created the original sprawl.
6. **Communicate the value case to the teams losing a familiar tool.** Adoption resistance is a change management problem, not a technical one. Teams need to understand what they gain, not just what they are giving up.

Measuring Success: KPIs for a Consolidation Program

- **Application count reduction:** the net change in the validated footprint inventory, tracked by function, against the baseline established at project start.
- **License cost recovered:** actual dollars eliminated from unused or redundant licenses, reconciled against procurement and finance records rather than estimated.
- **Time to cutover per validated system:** how long each regulated system migration takes from data mapping through equivalence testing to go-live, tracked to identify where the process bottlenecks.
- **Adoption rate on consolidated platforms:** active usage of the retained system by the teams whose prior tool was retired, since a technically successful migration with low adoption has not actually solved the underlying problem.
- **Re-sprawl rate:** the number of new, unreviewed technology purchases made outside the procurement gate in the twelve months following a consolidation initiative, the clearest signal of whether the governance component actually took hold.

Conclusion

Nobody sets out to build a fragmented technology landscape. It happens one reasonable purchase at a time, made by teams solving real problems with no mechanism forcing them to check what the rest of the organization already owns. The result, an average enterprise running somewhere between 100 and 300 applications, is not a scandal. It is the predictable output of years of decentralized, well-intentioned decisions with no consolidated view sitting above them.

What separates organizations that get ahead of this from those still managing it as background noise is not the absence of sprawl. It is a disciplined, repeatable way to tell real complexity from accumulated redundancy, and the governance to keep the gap from reopening once it closes. The Veeva CRM deadline, or whatever forcing function eventually lands on a given organization's desk, is not a reason to panic into a rushed swap. It is a reason to finally run the broader review that has been overdue for years.

About OmniTek & Contact Information

OmniTek Consulting is a trusted partner for organizations seeking to enhance governance, operational agility, and decision-making. We specialize in modernizing business processes with a blend of human-centered design, technology expertise, and hands-on change management.

For life sciences leaders staring down a forced migration deadline or simply tired of managing a technology footprint nobody fully understands, OmniTek brings a structured, best-practices-based way to separate sprawl worth eliminating from complexity worth protecting, and to execute that consolidation without putting a validated process or an active trial at risk. Whether the trigger is the Veeva Vault transition, a merger, or years of accumulated point solutions, OmniTek can help you turn a mandatory technology change into the broader review your organization has been putting off.

Contact us today to explore how OmniTek can support your transformation journey and drive lasting results.

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Click here to book a 15-minute call to see how OmniTek can help your team put these insights into practice.

Endnotes

[i] JumpCloud, "2025 SaaS Usage Statistics: How Much is Too Much?", citing Zylo SaaS Management Index and Exploding Topics data, 2025, available at https://jumpcloud.com/blog/saas-usage-statistics-how-much-is-too-much

[ii] SAP News Center, "CIO Trends 2025: The Consolidation Imperative Takes Center Stage," citing ADAPT CIO Edge research and Gartner, 2025, available at https://news.sap.com/2025/08/cio-trends-2025-the-consolidation-imperative-takes-center-stage/

[iii] IntuitionLabs, "Why Veeva Split from Salesforce: Pharma CRM Shake-Up," 2025, available at https://intuitionlabs.ai/articles/veeva-salesforce-split-pharma-crm-shake-up