

Legacy PMS to Smarteeva in 12 Weeks

A step-by-step guide to replacing your legacy post-market surveillance system with Smarteeva's AI-powered, Salesforce-native post-market surveillance platform.

12

Weeks to full migration

4

Structured phases

0

Data left behind

Why Migrate Now

Legacy post-market surveillance systems were built for a regulatory world that no longer exists. Complaint volumes have grown. Regulatory expectations have increased. AI has become required for competitive PMS operations.

Symptoms you will recognize

- ✗ Every workflow change requires a vendor engagement and a six-figure quote
- ✗ Every upgrade is a six-month project with full revalidation
- ✗ Your team has built shadow processes in Excel because the system is too rigid
- ✗ The data that should give you visibility is trapped in structures designed a decade ago
- ✗ Your total cost of ownership is 2-3x what you expected when you add hidden costs

Four Phases, Zero Guesswork

PHASE 1 · WEEKS 1-3

Assessment and Planning

Smarteeva's migration team maps your current complaint workflows, data structures, regulatory requirements, and integration points.

- Complete workflow map of current PMS processes
- Data migration plan with integrity validation approach
- Integration requirements document (CRM, ERP, PMS)
- Risk mitigation strategy for the transition period
- 3-5 working sessions with Quality, Regulatory, and IT

PHASE 2 · WEEKS 4-8

Configuration and Data Migration

Smarteeva is configured for your workflows, product families, and regulatory requirements. Historical data is migrated with full integrity validation.

- Configured environment matching your approved workflows
- Migrated historical data with integrity validation report
- Connected integrations (CRM, ERP, regulatory channels)
- User roles and permissions matching your org structure

PHASE 3 · WEEKS 9-11

Validation and Parallel Operation

Both systems run in parallel. Your team processes complaints through Smarteeva while maintaining the legacy system as a reference.

- Validation protocol and execution documentation
- Parallel operation results with discrepancy analysis
- Training completion records for all user groups
- Go/no-go assessment for cutover

PHASE 4 · WEEK 12

Cutover and Support

The legacy system is retired. Smarteeva becomes the system of record. Hypercare support is active for the first 30 days post-cutover.

- Cutover confirmation with system-of-record designation
- Legacy system decommission plan
- 30-day hypercare support with dedicated team
- Post-migration audit readiness package

Up to 96%

First-pass extraction
accuracy

70%

Faster complaint
resolution

8 min

PSUR generation
from connected data

35%

Of all FDA MDRs
filed through Smarteeva

What You Gain After Migration

- ✓ AI-powered complaint classification and risk assessment from day one
- ✓ Automated MedWatch, MDR, PSUR, and PMSR generation (8 min vs 100+ hours)
- ✓ 95% duplicate detection, verified at client implementations
- ✓ Salesforce-native: your admin configures it, your IT manages it
- ✓ One platform for complaints, adverse events, recalls, PMS reporting, and submissions
- ✓ Full traceability across every complaint, investigation, and regulatory submission
- ✓ Validated migration process with complete documentation at every phase
- ✓ 21 CFR Part 11 compliant with built-in electronic signatures, audit trails, and access controls
- ✓ Audit-ready from day one with complete records for inspections and Notified Body reviews

FAQ

How long does a migration take?

Most organizations are fully operational within 12 weeks. Complex, multi-site deployments may take longer with a phased approach.

What happens to historical data?

All historical complaint data, adverse event records, and quality data are migrated with full integrity validation.

Do we need to revalidate?

Yes, as with any system change. Because Smarteeva runs on standard Salesforce, many organizations find validation is simplified.

Can we run both systems in parallel?

Yes. Phase 3 is designed for parallel operation. Nothing cuts over until your team confirms readiness.

Ready to start?

Book a Migration Assessment and see what the first 12 weeks look like for your team.

Book a Migration Assessment →