
In-Housing Omnichannel Orchestration

A Point of
View for Life
Sciences IT and
Omnichannel
Leaders

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Executive Point of View

Omnichannel Orchestration has become a large portion of the commercial sales ecosystem that determines whether healthcare professional (HCP) engagement feels coordinated or fragmented. It is the decision layer that converts customer signals into a small set of prioritized recommendations: who to engage with next, what to engage them with, which channel to use, when to do it, and why that decision was made.

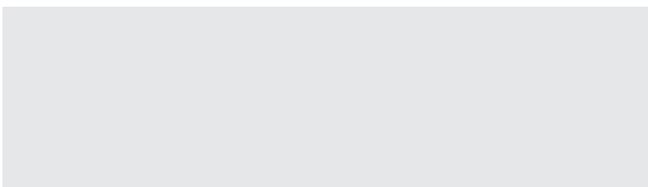
As an industry, Life Sciences has largely relied on fully outsourced solutions or packaged orchestration suites (e.g. Aktana or ZS Zaidyn). This choice can accelerate early progress, especially when the initial scope is narrow, but many teams hit the same ceiling: rule changes take too long, customer context is duplicated, transparency is limited, and cost overruns bog down return on investment.

What “In-House” Means In This Pov

In-housing orchestration does not mean rebuilding your data lake or rewriting your CRM. It means owning the decision logic, constraints, recommendation schema, and closed-loop measurement so the capability can move at the pace of your business.

“The goal is to replace a black box with a controlled, explainable decision layer that you can govern, improve, and audit.”

A practical approach is to use configurable enterprise SaaS platforms for what they do well and keep custom work focused on what differentiates you. One proposed architecture relies on Salesforce, which provides many of the required building blocks: Data360 (formerly known as Data Cloud) for customer context and activation; Marketing Cloud for journeys and messaging; Einstein Next Best Action and Flow for rules-driven workflows; MuleSoft for integration and operational controls; and Agentforce as an optional agent-first AI layer. The pattern described here stays CRM-agnostic: the same orchestration layer can activate into the CRM you choose, as the execution interface for field teams.



What You Should Be Able To Answer After Reading

How orchestration fits into a modern life sciences commercial stack, what capabilities you need to own to credibly claim “in-house orchestration,” and how to migrate from an external vendor without disrupting field execution or ongoing digital programs.

Why Orchestration Is Being Re-Architected As A Core Platform

Orchestration used to sit as a specialized add-on layer to CRM and marketing ecosystems. That separation is breaking down. Commercial teams now expect orchestration to directly power most day-to-day execution: rep worklists, call objectives, triggered journeys, service actions, and coordinated content delivery. In other words, orchestration is no longer an innovation project, it is an operational necessity.

Organizations do not bring orchestration in-house for ideological reasons. They do so to reduce friction, regain control of decision logic, and improve long-term cost efficiency. It happens when teams need to change rules quickly, reuse one customer context across field and digital, and operate with controls that stand up to scrutiny. Just as important, they want a measurement loop that makes the system smarter over time, not a static ruleset that slowly drifts away from reality.

Economics: Why Cost Becomes The Forcing Function

Speed is why companies buy outsourced orchestration. Cost and dissatisfaction are why companies move to it in-house. Packaged out-sourced orchestration vendors are fast to start, but as scope expands across brands, channels, and geographies, the cost and friction of change become the limiting factor.

What grows is not only the license. It is the compounded cost of change: every new rule, constraint, signal input, and measurement request becomes a custom project, and teams still do not fully trust or understand the “why” behind vendor’s recommendations.

- Licenses spend that scales with footprint and use cases.
- Professional services for “simple” changes that become a backlog.
- Integration work for every new signal input, activation path, and outcome you want to capture.

In-housing does not eliminate spend, it changes where you allocate your spending. You invest in reusable rulesets and operating models, so the marginal cost of a new rule, new channel, or new use case drops instead of climbing.

You Have Outgrown Your Fully Outsourced Orchestration When:

- A rule change turns into a ticket queue and takes weeks to land in production.
- Users see recommendations but cannot see “why,” so trust erodes.
- Field and digital teams optimize separately, creating conflicting touches and fatigue.
- Measuring impact takes too long and becomes a validity debate every time.

Proposed Reference Architecture: Salesforce-Centered Orchestration With Crm-Agnostic Execution

The diagram above illustrates the basic components that need to be built using mostly Salesforce products, while showcasing where non-Salesforce solutions fit in. The principle is simple: *one orchestration brain, multiple execution interfaces.*

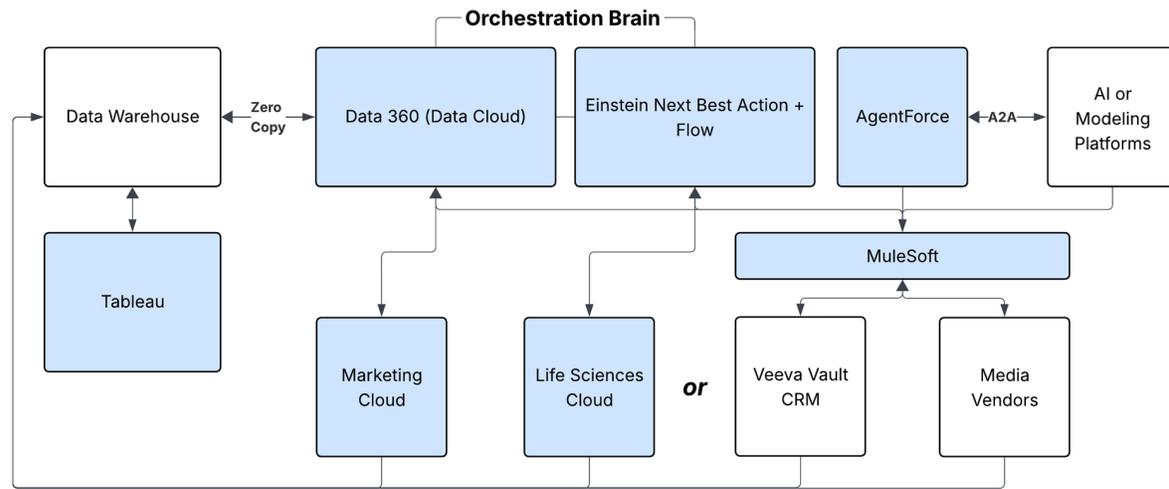


Figure 1. Reference architecture for in-house orchestration

Why Salesforce Provides A Practical Foundation For In-House Orchestration

Salesforce provides an out-of-the-box set of configurable building blocks that reduce custom code in the orchestration stack. **Salesforce Data360** (Data Cloud) can unify customer context and activate audiences downstream.

Einstein Next Best Action and Flow provide a native pattern for rules-driven guidance and workflow execution. **Marketing Cloud** can turn those decisions into triggered journeys and digital messages. **MuleSoft** adds the integration controls that make this production-ready: API mediation, retries, monitoring, and audit-friendly logging. **Agentforce** can sit on top as an optional AI agent layer that helps users interpret recommendations and supports governed automation.

Most importantly, this approach stays CRM-agnostic. You can keep one orchestration brain, while choosing the execution surface that best fits your organization.

What You Need To Build In-House Orchestration

At a minimum, in-house orchestration requires ownership of four core frameworks. First, a recommendation framework that stays stable even as channels change. Second, decisioning logic that can apply constraints and produce explainable outcomes with reason codes. Third, activation paths into execution systems so recommendations turn into real work. Fourth, closed-loop measurement that captures what happened next and feeds improvement.

A Practical Minimum Viable Scope

Start with a small number of recommendation types that matter, strong guardrails, and an explicit measurement plan. Orchestration earns trust through quality and governance, then scales. Starting with too large of a scope can erode trust with end-users, the Field Teams who will make or break these types of project's success.

As you mature, you can extend the decision layer with more advanced analytics and AI modeling, whether that runs in Salesforce Agentforce or in an external enterprise AI tooling platform. The foundation is still the same: clear rules, constraints, activation into execution, and closed-loop measurement.

Operating Model And Governance

Orchestration is a product, not a one-time project. It needs an owner, a backlog, and a release process. A common pattern is a hub-and-spoke model: a central orchestration platform team maintains the framework and shared services, while brand and franchise teams propose use cases and rules.

Governance needs to be designed into the product build. The basics are straightforward: approvals for rule changes, audit logs for what logic ran and when, clear policies for overrides, and monitoring that flags anomalies such as sudden spikes in recommended contacts or drops in acceptance rates. These controls are not “nice-to-have.” They are what allow orchestration to expand safely across multiple field teams and channels.

Implementation and Migration is What Determines Success

The fastest way to derail an in-house orchestration effort is to treat it like a big-bang replacement. **Orchestration** touches field execution, digital channels, data pipelines, and compliance governance. The safer pattern is to build the capability as a layer that can run in parallel, prove value in a small set of high-impact use cases, and then expand.

Implementation is less about a long checklist and more about getting a few foundational choices right. If these decisions are clear early, you avoid rework and you earn trust faster. This is not a CRM-only initiative. You need to bring along a cross-functional team to make these migrations successful: CRM owner, omnichannel lead, marketing/sales ops, IT, data & analytics, and compliance/MLR.

Migrating from external orchestration vendors

Vendor migrations are mostly a risk mitigation and change management initiative. Start with the use cases that matter, agree on the recommendation ruleset, and prove the new framework is explainable and measurable before expanding.

Run vendor and in-house recommendations in parallel, cut over use case by use case, and plan the last mile early. MuleSoft (or an equivalent integration layer) is typically the backbone for routing, retries, monitoring, and audit-friendly logging.

Slipstream IT is Uniquely Positioned to Help

Start with a focused working session with us to review your current orchestration approach, prioritize use cases, and determine how your current CRM suite interfaces. From there, outline a target architecture, a controlled vendor migration path, and a practical ownership model that aligns all stakeholders

Slipstream IT helps life sciences teams bring orchestration in-house by combining Salesforce delivery (Data Cloud, Marketing Cloud, MuleSoft, and Agentforce) with deep experience across all commercial life sciences CRMs.

Slipstream is a trusted technology partner exclusively serving the Life Sciences industry. Our global team brings deep domain expertise and pragmatic, solutions that simplify complex challenges across the entire product lifecycle.

Delivering with speed, compliance, and foresight.