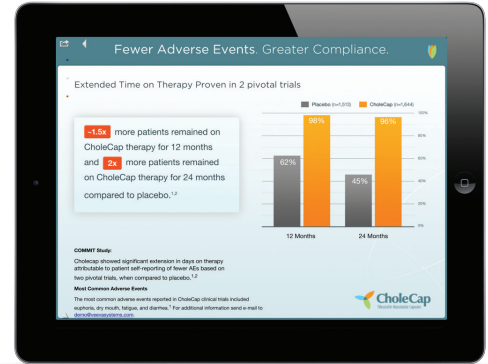# Veeva CRM Mobile
+ Veeva CLM

Personalized Interactions.
Powerful Insight.

Veeva CRM Mobile and Veeva CLM bring together the power of Veeva CRM and best-in-class closed loop marketing (CLM) into a single, easy-to-use mobile solution for field personnel. Veeva CRM Mobile and Veeva CLM help you plan and execute effective customer interactions for greater productivity and more personalized customer experiences.

Key benefits of Veeva CRM Mobile and Veeva CLM

• **More effective customer interactions** with instant access to all account and customer information.

• **Better-informed and more meaningful customer meetings** with timely insights channeled directly to your sales, medical, and marketing teams.

• **Simplified compliance** with regulated content, customer consent, sample limits, and inventory monitoring at your fingertips.

Solution Features

Mobile CRM

iPad and WIndows 8 and 10 mobile device users have full access to the power of Veeva CRM, the life sciences industry's most advanced cloud-based CRM system. Users can review customer data and insights anytime, even while offline. Built-in capabilities, including compliant emails, medical inquiry submission, order management, inventory monitoring, and eSignature, improve the customer experience while increasing field productivity.

Better Preparation and Account Management

Veeva CRM Mobile gives field teams a complete access to the customer information they need to effectively manage their accounts.

Planning is made easier with a multichannel calendar that shows all calls, calendar events, medical events, and medical inquiries for an account in a single view. With all information in one place, it's easy to check schedules, drill down into account details, and review a healthcare provider's "sphere of influence" to understand affiliations. In addition, a simple visual timeline provides a summary of all interactions, across channels, for a quick update before every call.

Closed Loop Marketing

Veeva CLM is a scalable, closed loop marketing solution that helps your field force create richer face-to-face customer interactions and provides detailed feedback to your marketing and sales teams. Customer data from CRM is seamlessly linked with presentations to deliver personalized content, boosting the impact of each customer engagement.
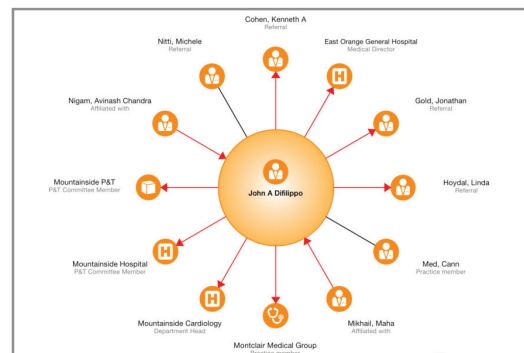

Figure 1: Sphere of Influence

More Value in Customer Interactions

With Veeva CLM field personnel can share rich content, such as videos and interactive presentations, right from the call screen. Physician interest and feedback can be recorded during the content presentation itself. Once a call is complete, eSignature support allows customers to sign immediately for samples, emails, or medical inquiries.

Role-based configuration tailors capabilities to meet the specific needs of each team, including specialty reps and medical science liaisons (MSLs).

Follow-up is easy with integrated Veeva CRM Approved Email enabling compliant emails to be sent while on the road. Customer-facing teams can also initiate Veeva CRM CoBrowse session from mobile devices for guided web navigation and collaboration, sharing rich content remotely.

Quick and Easy Call Reporting

Built-in call reporting reduces the administrative burden by collecting and storing call data automatically. Users just review the information and submit to create an accurate report.

Share the Right Content, Every Time

Manual processes for managing and distributing regulated content are prone to errors and compliance risk. Reduce these risks with pre-built connectivity to Vault PromoMats, Veeva's cloud-based solution for promotional content management.

Compliant and approved content is stored in a single, global digital asset library. Manual hand-off is replaced by automated distribution, update, expiry, and withdrawal of content across all channels.

Guided Interactions

Leveraging the power of data science, Veeva CRM Suggestions helps you deliver a better, more coordinated customer experience by offering recommendations on the best action and right channel for the next customer interaction. Since it's a part of Veeva CRM, recommendations are provided right in the reps' workflow where and when they need it. With the Veeva Data Science Connector companies have the flexibility to use the data science technology of their choice or internal solutions, quickly and easily. The interactive Suggestions Dashboard gives reps the opportunity to offer feedback to improve future suggestions (coming Fall 2015).

Actionable Insight across All Channels

Accurate data is at your fingertips with a seamless connection to VInsights, Veeva CRM's cloud-based database for prescriptions, sales, and customer

interaction data. VInsights provides easy-to-use online and offline reporting for field sales and sales management.

Greater visibility into consolidated customer data empowers your teams to make more informed decisions and deliver personalized customer experiences.

Manage Orders and Inventory on the Spot

Integrated order management makes it easy to create pharmacy and institutional orders from any location. An advanced pricing engine calculates the available discounts and incentives in real time, even in offline mode.

With inventory monitoring, field personnel can record information about product displays and in-store product quantities, including capturing and attaching photos to each record. Planogram support helps reps confirm display accuracy and contract adherence during each visit.

Better Events with Greater Compliance

With seamless integration to Veeva CRM Events Management, you have the power to create any event type, gain needed approvals, collaborate with vendors, manage budgets and attendee invitations, collect signatures, and more.

Transfer of value tracking, and budget adherence to maintain compliance have never been easier. Total visibility into speaker and attendee information and easy call recording provide a no-hassle way to follow up with event participants.

Industry Compliance Built In

eSignature support ensures compliance with national (FDA) and regional (state or province) legislation for sample disbursements, collecting sample requests and business reply cards (BRC), and distributing controlled substances. You can enforce limits on the allowable quantity or value of samples, high value promotional material, or other products, as required.

eSignature is also available for authorizing medical inquiries, email opt-ins, orders, contracts, and medical event participation.

Reliable Customer Data

Native integration with Veeva Network Customer Master provides on-demand access to new customer data profiles, allowing reps to detail new customers without delay.

Change requests to customer profiles can be submitted to Veeva data stewards for verification directly from Veeva CRM Mobile. Up-to-the-minute status updates on data change requests are pushed to mobile devices, keeping field representatives informed.

No Internet? No Problem

Users can easily move between online and offline content. With most capabilities and all current customer information fully functional offline, field teams remain productive even when they're not connected.

Configure Once, Use Everywhere

System configuration is quick with easy-to-use yet powerful system administration. Updates are made centrally and downloaded to all users without the need for additional processes or coding to manage configuration, security, and data sharing rules.
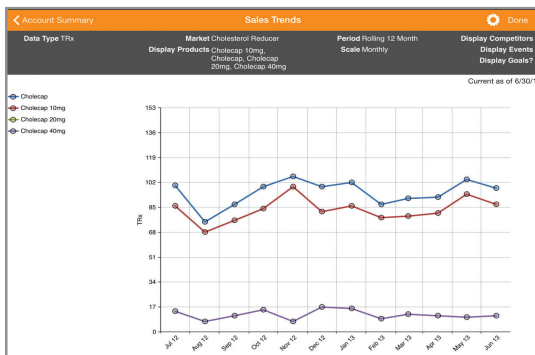

Figure 2: Actionable Insights