

Veeva Vault CRM

Veeva AI in Vault CRM:

Maximize Engagement While
Minimizing Prep and Data Entry



Overview



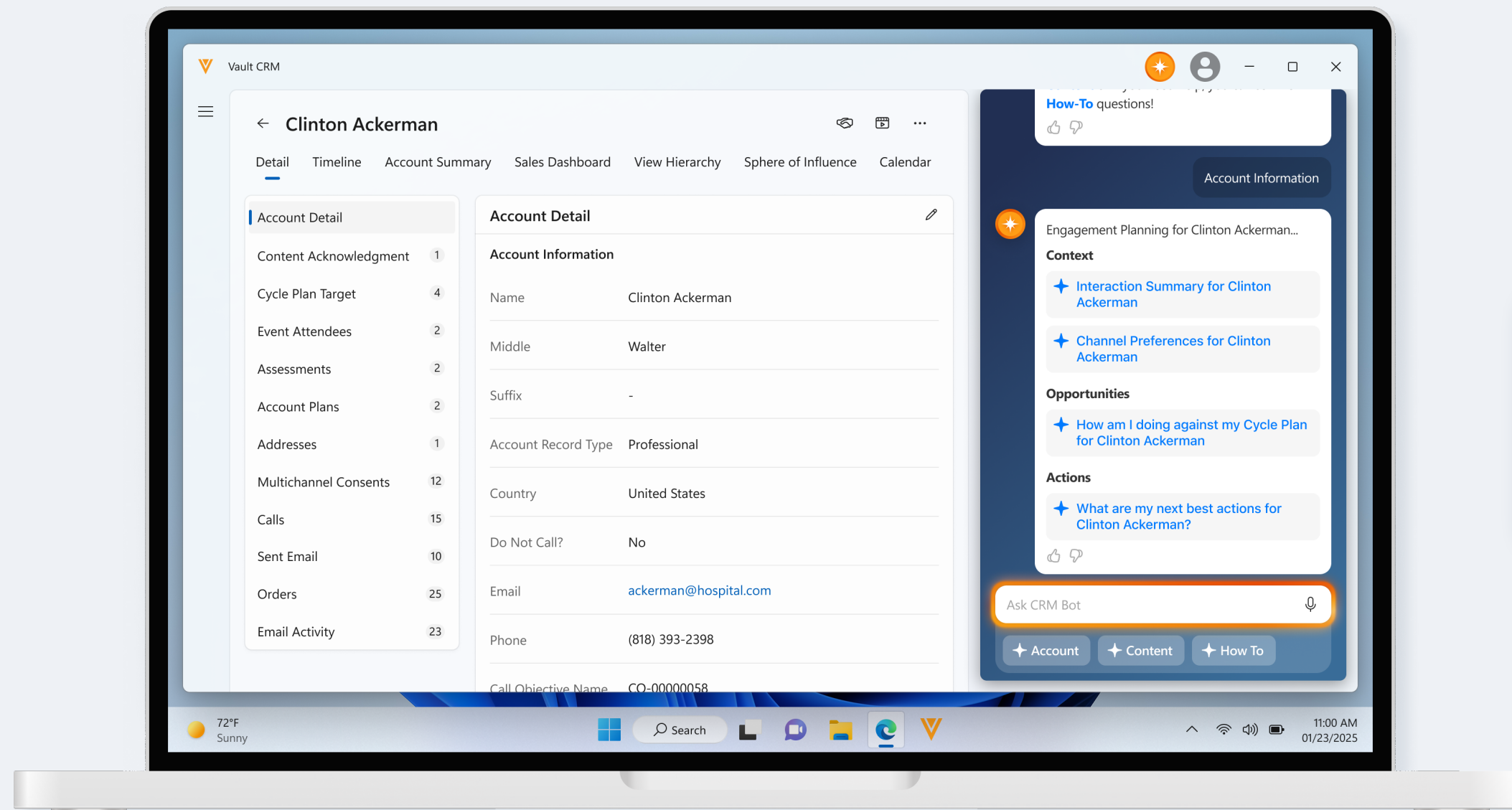
With Vault CRM, we are on the fast track to personalized, AI-powered customer engagement in 2025 and a clear path for future innovation.”

— **Ozlem Arisoy**,
Head of Commercial Digital and
Information Technology, Bayer

GenAI is a new computing paradigm — with technological impact as large as the internet and the cloud. **Veeva AI** uses these new, transformational capabilities to significantly increase knowledge workers’ productivity. Built into the core of Vault Platform, Veeva AI understands the application’s business rules and logic, uses application-specific prompts and safeguards, and directly and securely accesses Veeva application data and documents. This approach to AI places it directly into users’ workflows, so the effort to act on an insight is often one click.

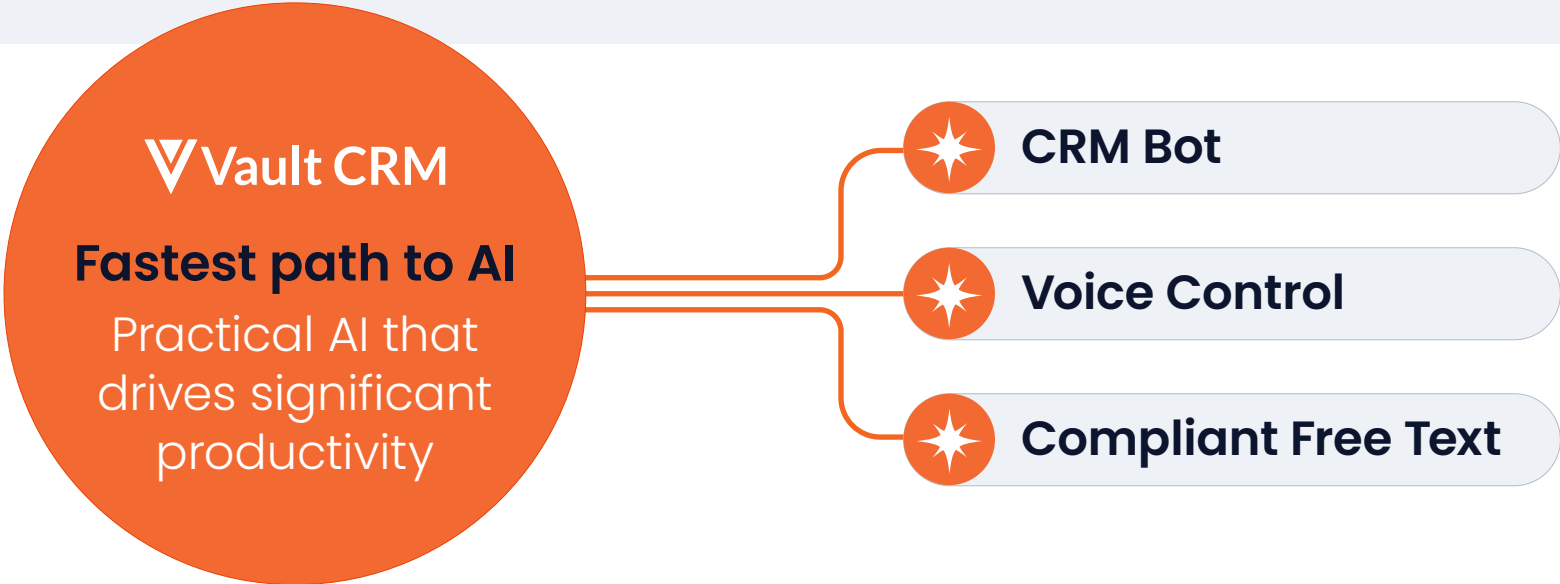
With Veeva AI, customers can configure and extend Veeva-delivered AI Agents and build custom AI Agents to address company-specific use cases. Users access AI Agents through a chatbot user interface or the AI API. Whether using a Veeva-supplied large language model (LLM) or configuring Veeva AI to use a customer selected LLM, data remains secure with Veeva AI.

Veeva AI in Vault CRM brings **CRM Bot** (an AI agent), **Voice Control**, and **Compliant Free Text** to Vault CRM in 2025.



The first release of Veeva AI is in December 2025 and it is free in Vault CRM for Vault CRM customers through 2030.

Veeva AI, directly in users' workflows



CRM Bot

CRM Bot is an AI Agent in Vault CRM that provides conversational answers and insights to users. Pervasive and context-aware, it enables:

- Better engagement planning
- Semantic content search
- How-to lookups for processes in Vault CRM

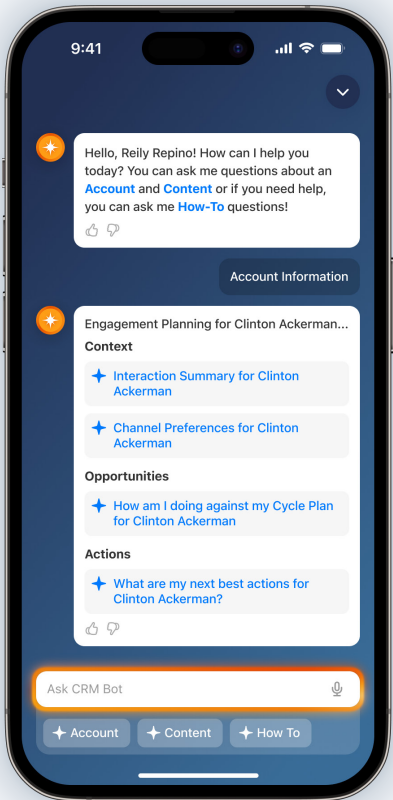
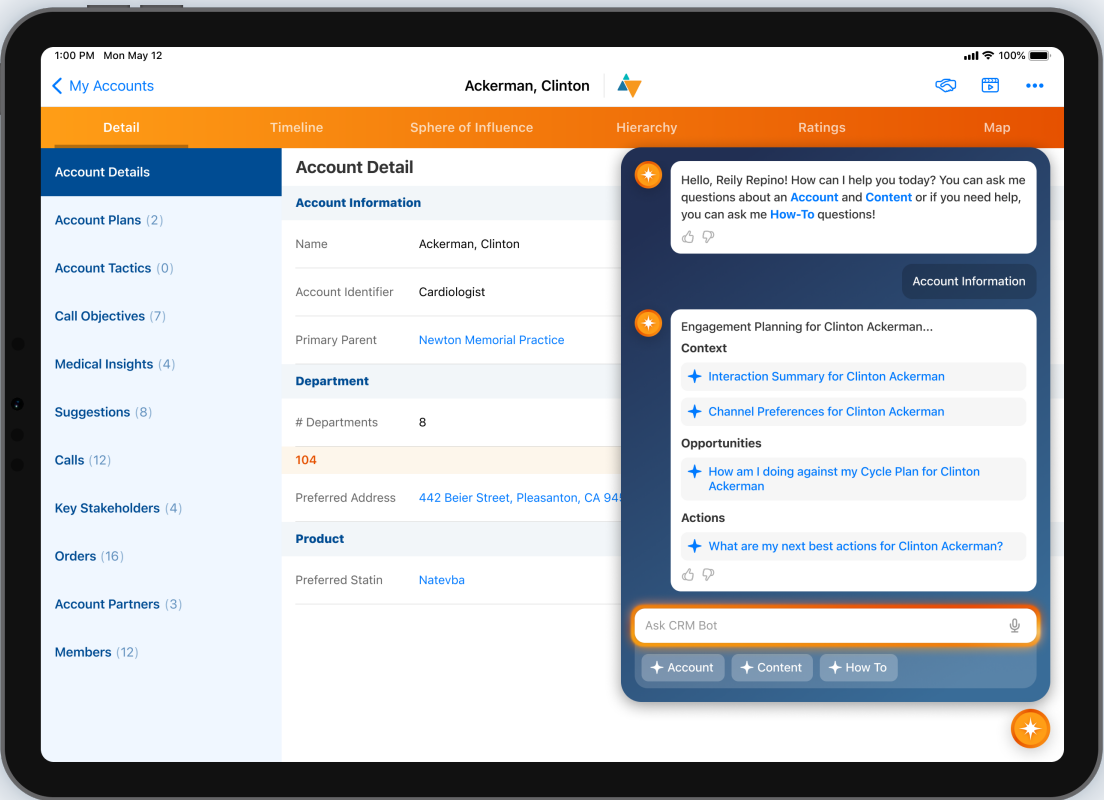
Designed for complex field teams including territory managers, account managers, medical and other specialists, CRM Bot minimizes prep work and data entry. Field teams deliver more personalized experiences with less manual effort.

COA methodology in CRM Bot

COA methodology provides users with **context**, identifies **opportunities**, and suggests **actions**. For example, Veeva AI can surface the most relevant assets to field teams so they respond rapidly in a customer’s moment of need. Veeva AI connects the dots across previous engagements and treatment inflection points, providing situational awareness for field teams to deliver education, resources, and updates.

Like any AI initiative, implementing CRM Bot is a project that requires change management and structured support to ensure users succeed in making the necessary behavioral and process changes.

CRM Bot is included in the Vault CRM license and requires Veeva AI, which is free for Vault CRM customers through 2030.



USE CASES

Better engagement planning: Intelligence and next-best actions tailored to individual HCPs are delivered proactively to inform account planning or execution.

Semantic content search: Surface relevant content intelligently, simplifying the search for approved, compliant materials.

How-to lookup: Fast, accurate access to extensive product information helps teams confidently answer customer questions in real time.

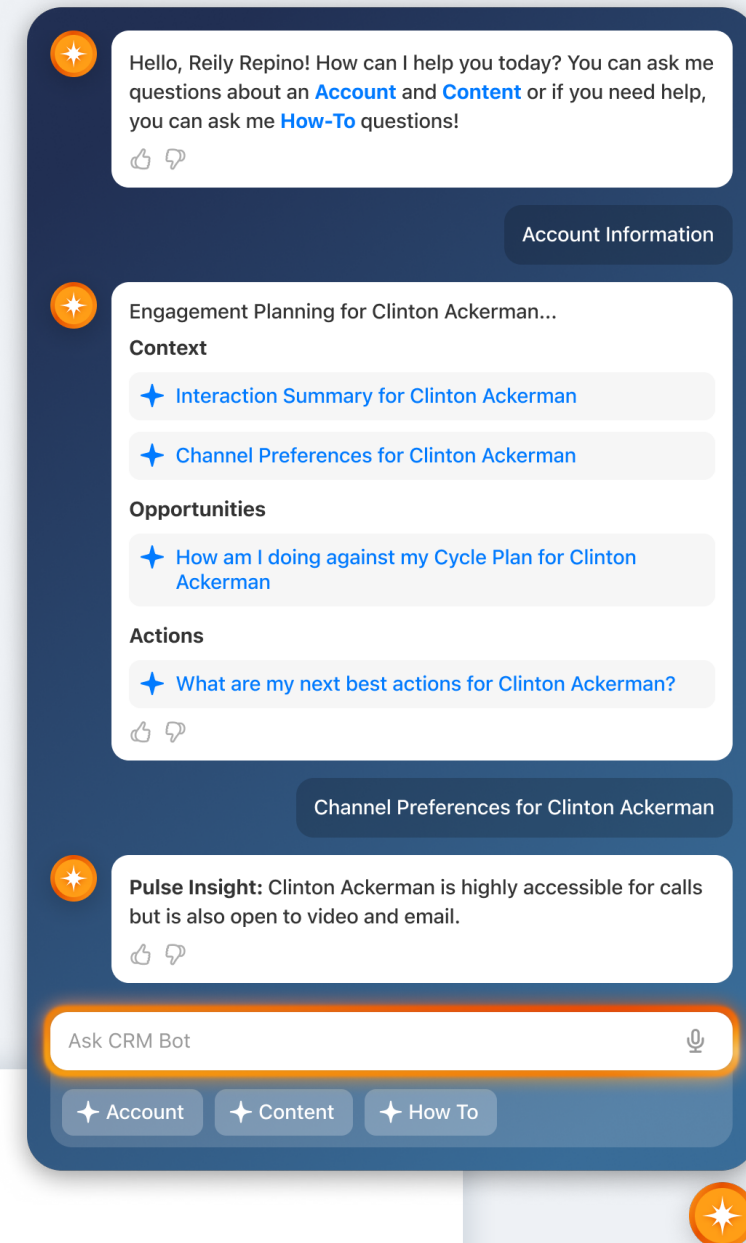
Voice Control

Voice Control transforms the CRM experience by allowing users to control Vault CRM with their voice, saving time and effort when transcribing notes into call reports. Voice Control helps field teams capture and act quickly on valuable insights.

With Voice Control's ability to expedite call logs, stakeholders across sales, marketing, and medical rapidly know what was discussed and can better plan for their next touchpoints. Voice Control:

- Records call details and key messages
- Conducts free-text compliance checks, saved for reference
- Can set team tasks and other actions

Voice Control is included in the Vault CRM license and requires Veeva AI, which is free for Vault CRM customers through 2030.



USE CASES



Hands-free CRM: Operate Vault CRM from any device or location.

Automation of repetitive tasks: Voice-to-data entry records, transcribes, and transposes call notes in real-time with built-in compliance.

See a territory manager log customer call notes and assign a task using Voice Control.



Compliant Free Text

To ensure regulatory compliance, life sciences companies often limit or restrict reps from capturing free-form notes from HCP interactions. The ability to record free text notes provides tremendous opportunity for customer and account coordination, but allowing it without oversight can introduce risk. Compliant Free Text unlocks free text for the life sciences industry, allowing these rich insights to be captured compliantly. As field teams enter voice or typed notes, it auto-checks for compliance in real time and flags statements or phrases that require follow-up.

Compliant Free Text:

- Uses a company's specific compliance policies, phrases, and keywords
- Ensures human intervention for any compliance issues it detects
- Can be configured to save history of compliance checks based on company policy

Compliant Free Text is included in the Vault CRM license and requires Veeva AI, which is free for Vault CRM customers through 2030.

4:00 PM Fri Apr 25

Cancel Call Report Video

Professional Information

Account: Ackerman, Clinton Datetime: 4/25/2025, 10:00 AM

Record Type: Call Report Location: 2458 Hacienda Dr, Pleasanton, CA 94588

Call Notes Problem Detected Please review and revise the highlighted area

Drug discussed Zefranta. Key Points Covered. Reviewed recent Phase III study showing 32% improvement in HbA1c control compared to baseline after 12 weeks. Highlighted once-daily dosing and favorable GI side effect profile. Discussed patient case study with Dr. Ackerman where Zefranta may be beneficial due to renal safety profile. **Treatment may be a good option for one of his patients, Sylvia Carter.** Follow-Up: Dr. Ackerman requested patient education materials and starter packs for trial use with appropriate patients. Plan to follow up in 3 weeks after initial patient starts to gather feedback.

Samples and Promotional Items

BRC

Samples

USE CASE

Real-time compliance checks

AI checks text- and voice-entered call notes for compliance, flagging potential problems to effectively mitigate risk.

See a territory manager's voice notes checked for compliance in real-time.



Life sciences specific AI is here in Vault CRM. Achieve coordinated customer engagement through effective AI use and alignment across data, content, and teams with Veeva AI in Vault CRM.

See a demo of Veeva AI in Vault CRM. 

ABOUT US

Veeva is the global leader in cloud software for the life sciences industry. Committed to innovation, product excellence, and customer success, Veeva serves more than 1,100 customers, ranging from the world's largest biopharma companies to emerging biotechs. As a Public Benefit Corporation, Veeva is committed to balancing the interests of all stakeholders, including customers, employees, shareholders, and the industries it serves.

For more information, visit www.veeva.com/ap

