

# 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. 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 targeted sales calls** — Instant access to all account and customer information ensures more relevant, tailored interactions.
- **Actionable insights** — Timely insights channeled directly to your sales, medical, and marketing teams enables better-informed and more meaningful customer meetings.
- **Compliant messaging** — Efficient management and distribution of the latest regulated content simplifies regulatory compliance.

## 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 email, 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: Digital Presentation Library

## 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 presentation. Once a call is complete, eSignature support allows customers to sign 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).

Using integrated Veeva CRM Approved Email, reps can send compliant follow-up emails from the field. 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 Veeva Vault PromoMats — a Veeva cloud-based solution for promotional content management.

Compliant and approved content is stored in a single, global digital asset library. Manual hand-offs are replaced by automated distribution, updates, 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 are needed. With the Veeva Data Science Connector companies have the flexibility to use the data science technology of their choice or internal solutions. The interactive Suggestions Dashboard gives reps the opportunity to offer feedback to improve future suggestions.

## Actionable Insight across All Channels

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



Figure 2: Actionable Insights

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 retail space planning 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, invite and manage attendees, collect signatures, and more.

It is easier than ever to track transfer of value spend, and maintain budget adherence to maintain compliance. 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 requests and disbursements, collecting 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.

Requests for updates to customer profiles can be submitted to Veeva data stewards 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.