

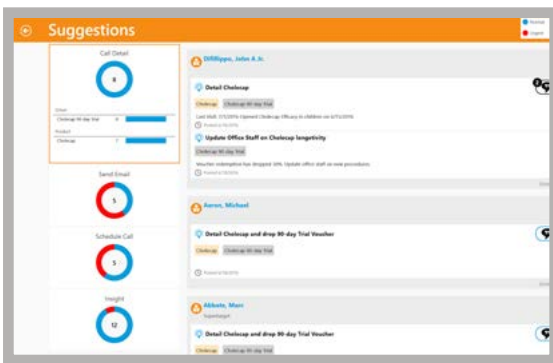
# Veeva CRM Innovation Guide

## Veeva CRM Suggestions

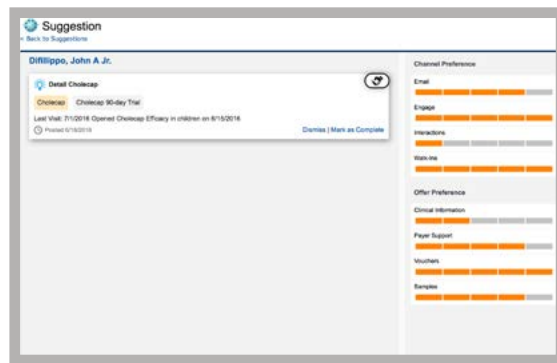


# OVERVIEW

Customer teams are challenged to make the best possible decisions about who to see, what to say, how to say it, and when. Plans are approved, appointments are made, but so much can change in the space of a few days, let alone weeks or months. Veeva CRM Suggestions helps to fine-tune actions to maximize customer success.



Veeva CRM Suggestions Home Screen



Veeva CRM Suggestions

Veeva CRM Suggestions is native functionality in Veeva CRM that provides your teams with customer-specific insights and recommended actions that enable better and more tailored engagements. CRM Suggestions covers a range possible actions, from scheduling a call through to advice on the right channel for customer interactions. Each suggestion can be linked with an action in CRM to make it easy to apply.

Feedback on suggestions can also be captured, making it possible to advise your analytics team or partner to improve modelling. For example, a next best action to create an email for a particular customer about a new piece of clinical data could be suggested, but the rep could decide he or she will leave this for the face-to-face call planned in a few weeks instead. Leveraging CRM Suggestions is like having a business coach out with your reps all the time, yet the reps are left with the ultimate decision of what – or what not – to do.

Veeva CRM Suggestions is available across all platforms, including online and mobile CRM platforms.

# TIPS & TRICKS

## › CUSTOMER OBJECTIVES

**Define your key objectives in advance.** Having well-defined objectives upfront will allow you to fine tune suggestions to maximize sales effectiveness. For example, if your top priority is to increase sales, you should determine which drivers will have the biggest impact on sales. Is it visiting more targeted HCPs? Increasing the number of calls? Lowering your call dismissal rate? Whatever your measures of success, be sure they are well defined and measurable from the start. These insights will be essential to defining your analytics approach, whether through your internal team or a partner.

## › CHANGE MANAGEMENT

**Have a change management plan.** Ensure that end users know that Veeva CRM Suggestions is not a new level of control or oversight, but rather a tool that will help them engage more effectively with their customers. Put training in place to demonstrate how the tool can propose the next interaction with customers, yet it allows them to remain in control of decisions. Consider starting with a small pilot to capture user input and make adjustments before rolling it out to the rest of the organization.

## › END USER TRAINING

**Ensure adequate end user training.** End users and district managers will need to be trained both on how to use Veeva CRM Suggestions, as well as on how to interpret suggestions. Feedback is actively captured, and the system continues to learn when users act upon or dismiss a recommendation. Suggestions will become more tailored the more reps provide feedback into the system.

# RESOURCES

Your one spot for all CRM Suggestions resources

## BLOGS

- [How One Midsize Pharma Made HCP Calls Less Daunting](#)
- [Meet our Data Science Partners: The Power Behind Veeva CRM Suggestions](#)

## RESOURCES

- [Webpage](#)
- [Product Brief](#)
- [Demo](#)

## SUPPORT

- [Technical Help Guide](#)
- Contact your sales representative for more details

## PRESS

- **PharmaVoice:** [How to Turn White Noise into Recommended Strategies](#)
- **PM360:** [Analytics-driven Marketing](#)
- **MM&M:** [Partner Forum: Will Predictive Analytics Sell](#)
- **FiercePharma:** [Take the Guesswork out of Sales: Predictive Analytics Improves Pharma Rep Decisions](#)



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