# **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.

Suggestions		● Nation ● Ingent
Cal Deal	O Delitigen, Jahn & Jr.	
	😲 Detail Chalosap	99
	Change (Change of my first	
Choice II de Ter 8	Lead MAL TO UT In Equival Choice on UNLEY II Address on UT COME	
ficial Onicas 7	🚽 👘 Update Office Staff on Choicop langetivity	
ACCES MARK	Children Mildle Hall	
Intituit	Vesselan indersphere lage impand 20%. Update affect staff on new proceedance, (3) research of them	
$\odot$	😚 form, Michael	
Schedule Cell	C Detail Chaloring and drop 10-day Trial Youther	G
and the second s	Change Theorem II and Mar	
	Committee of the second	
$\mathbf{U}$	C towards	-
	O Abberto, Mare	
	Detail Chalacap and drop 30 day Trial Youcher	6

llippo, John A Jr.	_	Channel Profession
Detail Cholecap	3	Enal
Inciences Chiviences 90-day Trial		trace
I Visit: 7/1/2016 Opened Cholecep Efficacy in children on 6/15/2016	100100000000000000000000000000000000000	And in case of the local division of the loc
Preted 6/150118	Domins   Mark as Complete	ineactors
		the second data and the se
		Vitancine
		Offer Preference
		Dincal Internation
		Payer Support
		Visities.
		Europies

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.

2

# **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: <u>The Power Behind Veeva CRM</u> <u>Suggestions</u>

#### RESOURCES

- <u>Webpage</u>
- Product Brief
- <u>Demo</u>

#### 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



