

# Veeva & U Webinar

## MyInsights

How the standard MyInsights pages can be adapted to meet your needs



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Thank you for joining the Veeva & U webinar



Microphones will be **muted** throughout the webinar



Please use Q&A function to ask questions



Questions will be answered at the end of the presentation



We will email this presentation and the recording of the webinar



**Chris Wade**  
Director, Multichannel Strategy



**Donal McConnell**  
Solution Consultant



**Attila Hagelmayer**  
Consultant, Technical Services

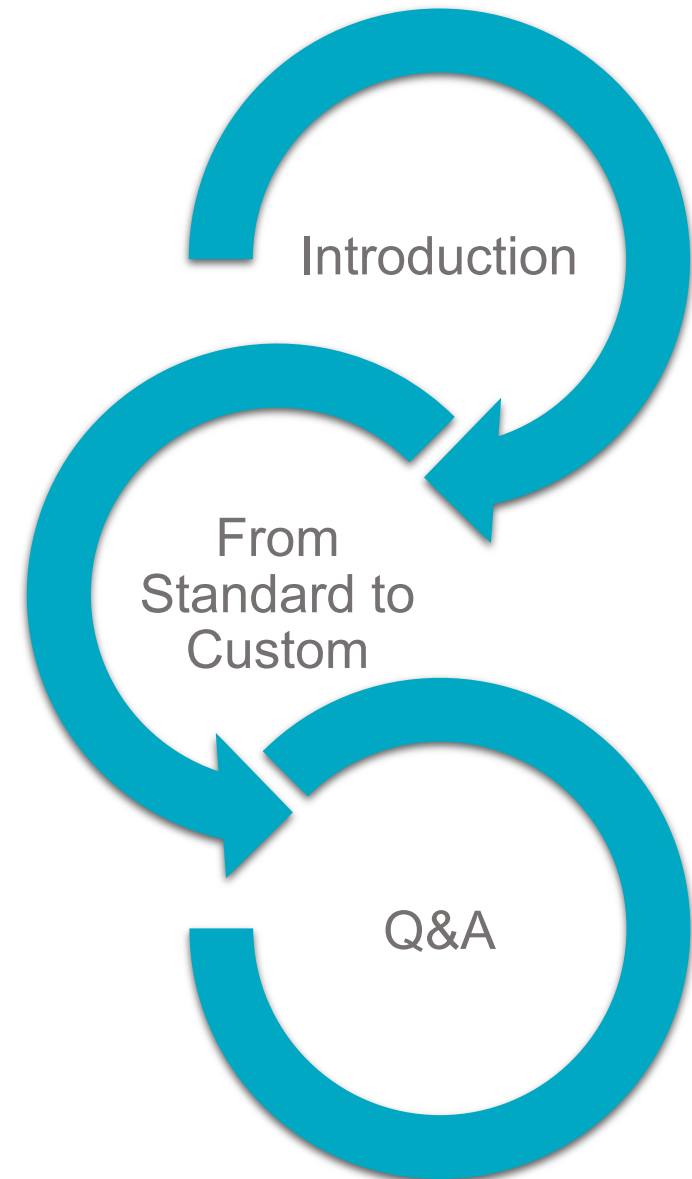


**Albert Almeyda**  
Customer Success Manager



## Today's session

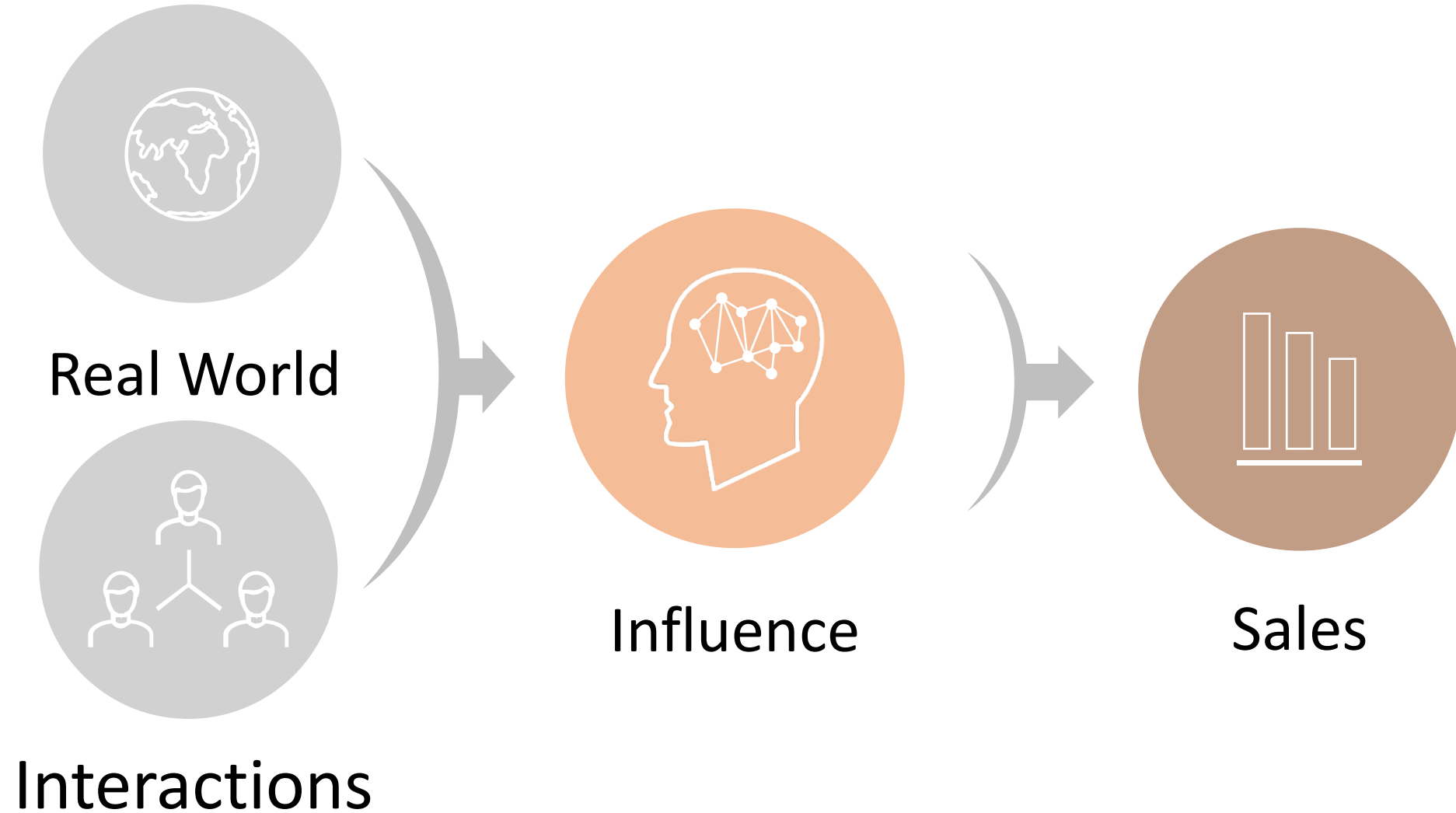
- How the standard MyInsights pages can be adapted to meet your needs:
  - ✓ In a easy and flexible way
  - ✓ Focus on the information that matters most to field teams
  - ✓ Learn what's needed and what works before customizing pages
- ...and drive better decision-making



# MyInsights

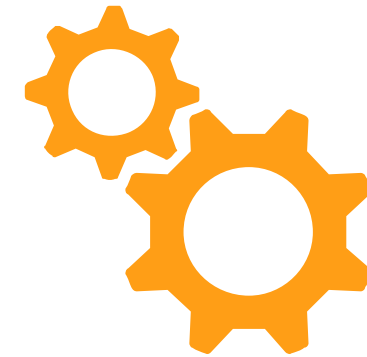
Using Embedded Insight to Accelerate  
Effective Customer Engagement







**Insights**

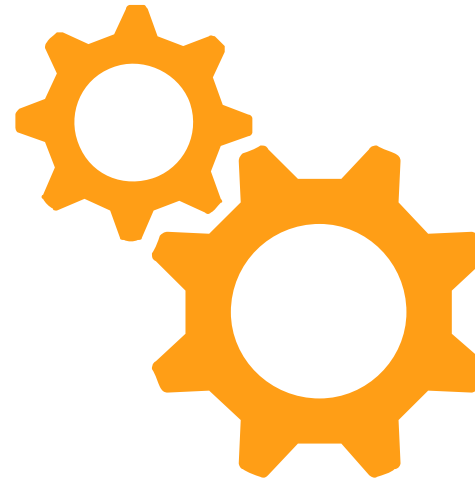


**Execution**





**Insights**

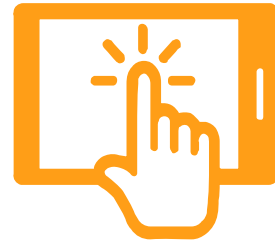


**Execution**



## **New Data**

Essential to building customer relationships



## **Simplified Tools**

Targeted information delivery



## **Data Visualization**

Embedded into field processes provide actionable insights

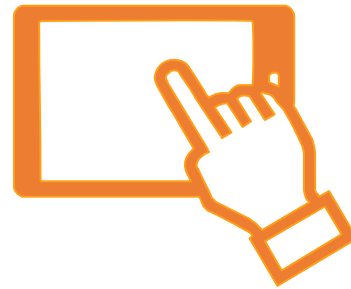
# V CRM MyInsights

- ✓ Actionable
- ✓ Flexible
- ✓ Real Time
- ✓ Embedded

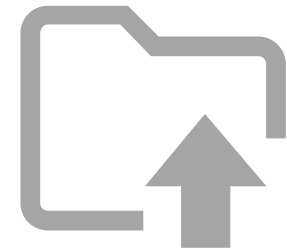




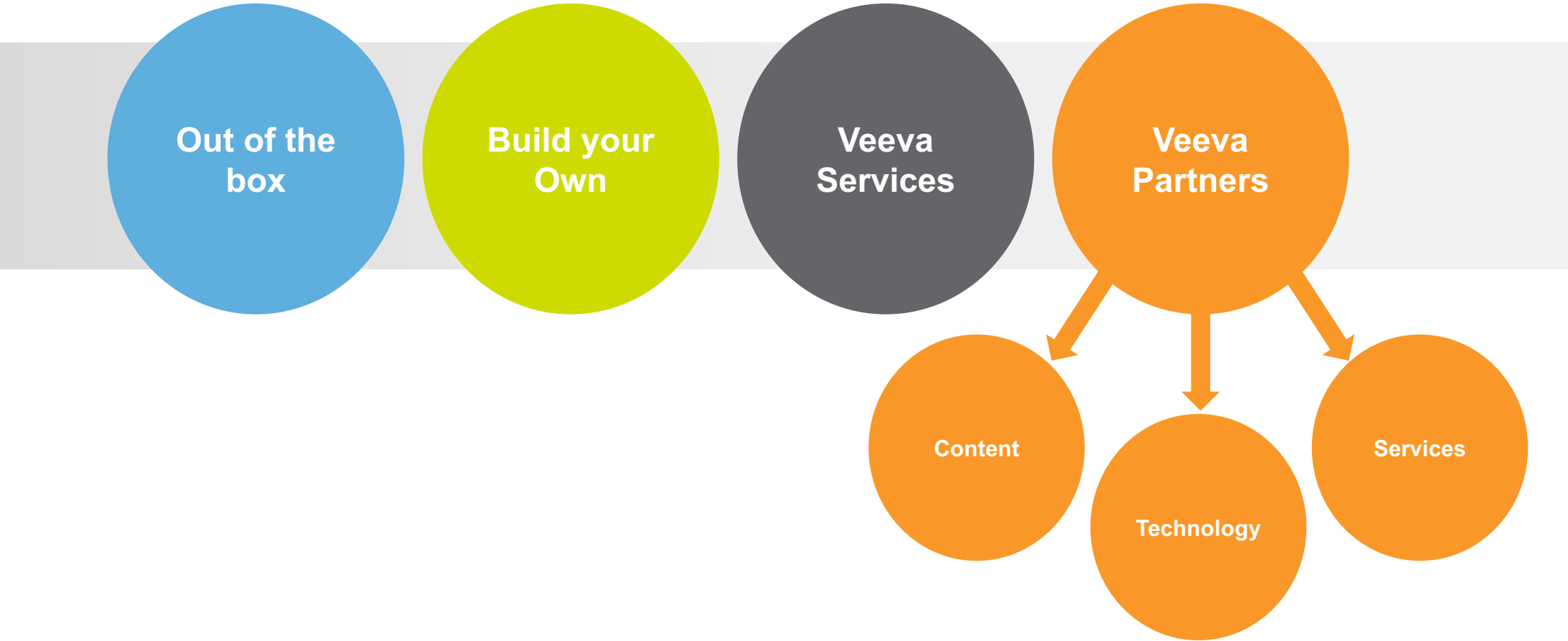
**Custom  
Visualisations**



**Landing  
Pages**



**Embedded  
Processes**



## Account Plan

Atlantic Health System Health Active Approved

16% Complete

1. Establish strong contact with the C-Suite organization 2. Engage in a Risk Based Contract strategy concerning our new drug 3. Establish Patient Advocacy Program

Progress View All >

Strategies Total: 6 16% Complete

Activities Total: 4 25% Complete

Interaction Objectives Total: 9 22% Complete

Upcoming: 7 View All >

INTERACTION OBJECTIVES	DUE
Discos Drug Patient Advocacy Program	130 Days Overdue
Adherence Check	126 Days Overdue
Dr DiIppio Advocacy	126 Days Overdue
New Product Launch - Risk Based Contract	37 Days Overdue
Risk Based Contract Discussions	Due in 107 Days

Product Sales Trends

Cardiology | Month: void | Rolling 1 Month | NRx

## HCP Engagement

Call Summary View All Activity My Activity Period: 4/30/2018 - 7/25/2018

Filters: Status Call Type Clear

Total

Calls: 34

Samples: 68

Calls with Samples: 9%

Calls with CLM: 24%

Product	Calls	Call Date
Cholecap	13	4/30/2018
Labrinone	7	5/9/2018

Product	Quantity
Cholecap 40mg	58
Cholecap 20mg	10

Recent Key Messages	Name	Call Date
Intro Slide		7/25/2018
Demo-Intro		6/14/2018

## Territory Summary

02/08/2018 - 08/08/2018 | Territory (All) | Product (All) | Status (All) | Call Type (All)

Reach: 81%

Frequency: 4 Avg. Calls per HCP

2 Avg. Details per HCP

PRODUCT	CALLS
Cholecap	64
Labrinone	26
Curemist	14

Call Frequency Trend

1.2 Avg. Calls per Day

FREQUENCY	# OF ACCOUNTS	% OF ACCOUNTS
0	13	18%
1	20	28%
2	15	21%
3	6	8%

## KOL Profile

Alexander, Richard

Position: Senior Physician

Institution: Wells Medical Center

Phone: 1-800-888-3434

Specialty: Thoracic Oncology

Address: 2219 48th Street, Suite 1800, Sacramento, CA 95715

Email: ralexander@ucmc.com

Wells Medical Center

Primary Position: Senior Physician

Institution: UC Davis Medical Center

23 Total Affiliations

- Hospitals
- Universities
- Professional Societies
- Advisory Boards
- Department Head
- Others
- Practice
- Boards
- Others

Company Collaboration

## Order Management

Total Value in Euros vs Volume in Units

Net Amount vs Discount

Net Amount vs Profit

Quantities vs Free Goods

## Sales Trends

Product Sales Trends Report

Rose, Antonucci

Specialty: Primary Care

Role: Chief Resident

Total Market: 740 (8.87% ↑)

Account: 27 (4.27% ↑)

TRx & NRx Trends by Product

My Product: Cholecap | Competitor's Product: None

Cholecap TRx

Cholecap NRx

# MyInsights

From Standard to Custom



# Demo





**Veeva CRM**

Classic Example Territory **Modified Territory Insights** Nitro Orders Nitro Reports Territory Insights Territory Sales Ter>

Call Activity Approved Email Activity

12/22/2018 - 03/22/2019 Territory (All) Product (All) Status (All) Call Type (All) **Segment Type (All)**

Reach: 18% Avg. Calls per HCP: 2

Frequency: 0 Avg. Det...

Segment Type (All) [checked]

- A
- B
- C
- D

Call Frequency Trend

New Filter

New time aggregation in the Frequency Chart

**5.1** Avg. Calls per Day

Monthly Weekly

FREQUENCY	# OF ACCOUNTS	% OF ACCOUNTS
0	1037	81%
1	173	13%
2	22	1%
3	11	0%
4+	23	1%

Most Frequently Seen Accounts

NAME	CALLS	% SAMPLES	% CLM
West Green Hope	51	0%	61%
Wilson, James	30	0%	80%
Abbas, Martin	16	0%	69%

Least Frequently Seen Accounts

NAME	CALLS	% SAMPLES	% CLM
The Royal Bridge Hospital	1	0%	0%
Nuffield Health Brighton Hospital	1	0%	0%
University College Hospital	1	0%	0%

Record call

Record call

Record call

New Smart Link to record a call

# Modifying the MyInsights page based on business needs



Adding Filters  
based on  
business needs



Altering value  
ranges to  
enhance the  
visualizations



Actionable  
Insights via  
Smart Linking

# Steps to update existing report



Download  
Source



Update  
Code



Upload

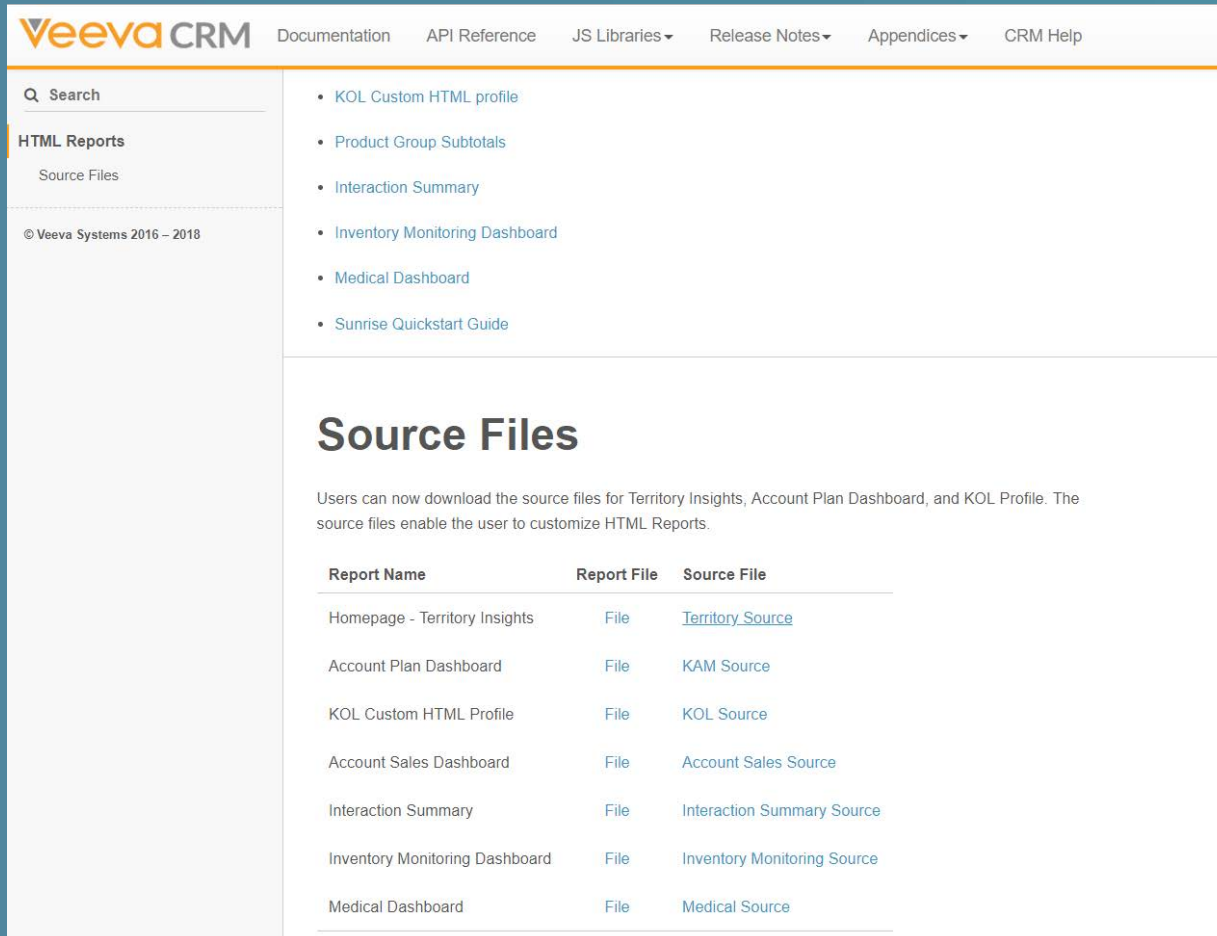


Publish



Use

# How to access report source code?

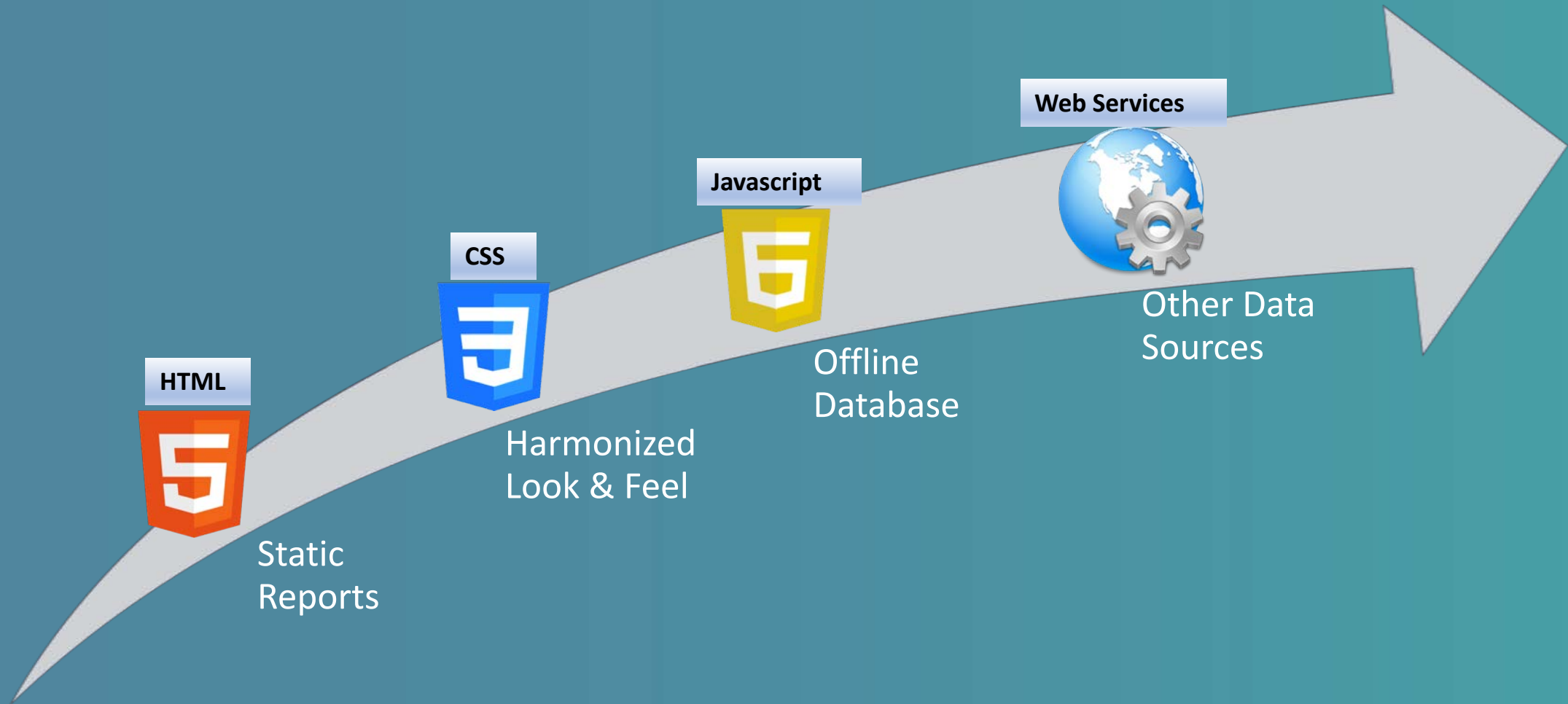


The screenshot shows the Veeva CRM documentation page for HTML Reports Source Files. The page includes a navigation bar with links for Documentation, API Reference, JS Libraries, Release Notes, Appendices, and CRM Help. A search bar is located at the top left. The main content area is titled "Source Files" and lists several reports with their corresponding source files. A table below the text provides a detailed list of these reports and their source files.

Report Name	Report File	Source File
Homepage - Territory Insights	File	<a href="#">Territory Source</a>
Account Plan Dashboard	File	KAM Source
KOL Custom HTML Profile	File	KOL Source
Account Sales Dashboard	File	Account Sales Source
Interaction Summary	File	Interaction Summary Source
Inventory Monitoring Dashboard	File	Inventory Monitoring Source
Medical Dashboard	File	Medical Source

- Library of prebuilt reports
- <https://developer.veevacrm.com/docs/reports/>
- Set of fully customizable prebuilt HTML 5 reports that Veeva has built for customers to use
- These reports can be either deployed as out of the box reports or with minimum customizations required

# What skillsets do we need to update a report?



# Implementation approaches



100% standard  
page



Modify the  
standard page



Custom  
development

# Q&A



## Unanswered questions during the webinar

- Could we use smart linking also for Consent Capture Page?
  - No, this is not possible. Please check [this article](#) available in the Veeva CRM online help for a detailed list of supported objects
- How to arrange tabs in Veeva CRM? If we want to make Myinsights report as first in the order?
  - The tabs are sorted alphabetically



## Unanswered questions during the webinar

- We are building Vinsights in Myinsights and want to turn off the offline vinsights tab without modifying online tab. How it is possible?
  - No, it is not possible to turn off Vinsights offline only
- Is it possible create and edit records for custom objects directly from MyInsights reports? So after clicking to link, you are redirected to Edit Page of record
  - No, this is not possible. There are few object that allow the creation of new records. Please check [this article](#) available in the Veeva CRM online help for a comprehensive list of supported objects

## Unanswered questions during the webinar

- Is Smart Linking on Sent email possible in Territory Report ?
  - Approved Email users can now create a new email from MyInsights as well as view previously sent emails

# Register for Your Monthly Webinars

## V CRM

**Tuesday, 9 April, 2019**

**Sampling and Promotional Items** – Learn how to manage samples/promotional items allocation and distribution efficiently and in a compliant way

**Tuesday, 7 May, 2019**

**Back to Basics** – Discover some basic CRM functionalities that can considerably improve the CRM end-user experience

## V Vault PromoMats

**Thursday, 11 April, 2019**

**Powering the Compliant Web with Vault Digital Publishing** – Join this session to learn how to use Vault to serve content quickly and compliantly to global audiences and generate actionable insights on content consumption

**Thursday, 16 May, 2019**

**Top 5 Ways to Reduce Time Spent in MLR** – Join this webinar for practical tips on how to streamline your review and approval process in Vault PromoMats

# Community Forums



Networking & Collaboration



Share Industry Best Practice



Veeva&U Community



Opportunity to Meet the Experts

## UK&IRE

26<sup>th</sup> March 2019  
London

## France

4<sup>th</sup> April 2019  
Paris

## Spain

23<sup>rd</sup> May 2019  
Madrid

