



## INNOVATION GUIDE

# veeva CRM Events Management

# Overview

Veeva CRM Events Management maximizes attendee engagement with features optimized for virtual, hybrid, and live events.

Veeva CRM Events Management is an integrated solution built into Veeva CRM that provides one solution for all events and engagements, supports visibility and control, and drives impactful event experiences. Fully integrated with Veeva's commercial applications, Veeva CRM Events Management leverages key features from Veeva CRM Engage Meeting and Veeva CRM Approved Email to capture data along every step of the events journey.

In a post-COVID events landscape, Veeva CRM Events Management features focus on empowering the "new normal" of virtual and hybrid events. With Veeva CRM Engage for Events Management, contactless sign-in, and personalized invitations, virtual, and hybrid events provide networking and collaboration opportunities while capturing valuable attendance and participation insights.

Veeva CRM Events Management is available on online and mobile CRM platforms.



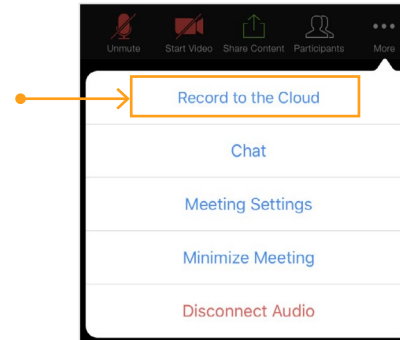
## Tips & Tricks

### GET REAL ENGAGEMENT FROM YOUR VIRTUAL AND HYBRID EVENTS

Veeva CRM Engage for Events is designed to create the peer-to-peer communication that your attendees are missing from an in-person event experience. Built on the Zoom platform, Engage for Events has an intuitive UI and allows hosts, speakers, and attendees to share audio, video, and presentations.

Simplify event execution by linking Engage for Events with the rest of your Veeva Commercial Cloud – pull contacts from multichannel Veeva CRM, automate invitations through Veeva CRM Approved Email, record the session in Vault, and house new data in Veeva OpenData.

**Tip: Record your virtual event and store the playback in Veeva Vault.**



### TAKE ADVANTAGE OF FAST AND FLEXIBLE QR SIGN-IN

Contactless sign-in has never been easier. Upgrade your manual processes with QR Code Self Sign-in. Hosts can print, email, or physically display the unique event QR code. Once attendees scan the QR code, they are guided through the sign-in process in the language of their browser. On-site registration for walk-in attendees and meal opt-in options are supported in the sign-in process.



# Tips & Tricks

Hosts may access a comprehensive view of the attendee list in the Sign-In Summary Screen, where you can view who completed the sign-in and initiate the process directly from your device.

**Tip: Before starting your event, check who has signed-in directly from the Sign-In Summary Screen.**



QR Code Self Sign-In is included in your Events Management license. Enable this feature using the following settings:

To configure QR Sign-in:

1. Grant admins access to the **EM\_QR\_Sign\_In\_Admin\_vod** Visualforce page:
2. Grant admins visibility to the **QR Sign In Administration** tab.
3. Grant the event admins the following permissions:

OBJECT	OLS	RECORD TYPES	FIELDS	FLS
EM_Event_Rule_vod	CRUD	Walk_In_Fields_vod	<ul style="list-style-type: none"> <li>• QR_Sign_in_Enabled_vod</li> <li>• Walk_In_Fields_vod</li> </ul>	Edit
EM_Event_vod	R	n/a	QR_Sign_in_Enabled_vod	Read

4. Enable the following Administrative Permissions for admins:
  - Modify All Data
  - Modify Metadata Through Metadata API Functions
5. Grant end users the following permissions:

OBJECT	OLS	RECORD TYPES	FIELDS	FLS
EM_Event_Rule_vod	R	n/a	QR_Sign_in_Enabled_vod	Read
EM_Event_vod	CRUD	n/a	QR_Sign_in_Enabled_vod	Read

6. Place the **QR\_Sign\_In\_Enabled\_vod** field on the page layout assigned to the Walk\_In\_Fields\_vod record type on the EM\_Event\_Rule\_vod object.



## Tips & Tricks

### TARGET AUDIENCES, PERSONALIZE INVITATION TEMPLATES, AND GATHER EVENT FEEDBACK

Leverage the effectiveness of email without the regulatory risk with Veeva CRM Approved Email. Fully integrated within Veeva CRM and Events Management, Approved Email automates compliant invitation processes while capturing valuable customer insights. You can send official invitations, RSVP announcements, post-event follow-up messages, and feedback surveys. Use these three Approved Email steps to increase event attendance and satisfaction.

1. **Target** your audience by segments: Designate a target audience type (speaker, attendee, team member) for a given email template.
2. **Personalize** the invitation templates: Use tokens with email templates to tailor your communication and make it more engaging.
3. **Gather feedback** from participants: Capture valuable insights with surveys to gauge post-event feedback. All survey responses are captured within Veeva CRM without the need for additional reporting tools.

**Tip: Use the survey tool in Approved Email to gather post-event feedback.**

\*INDICATES A REQUIRED FIELD

1. Overall, how satisfied were you with the Cholecap Speaker Program?

2. How likely are you to attend another Cholecap Speaker Program?

3. How would you rate the speaker for the event?

4. What did you enjoy most about the Cholecap Speaker Program?



# Resources

## VEEVA CRM EVENTS MANAGEMENT



**Product Webpage** ▶



**Product Brief** ▶



**Whitepaper: Guide to Digital HCP Engagement** ▶



**Digital Excellence Webpage: Latest Findings and Trends on Digital HCP Engagement** ▶

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