

Veeva CRM Standard Metrics FAQs

What is Veeva CRM Standard Metrics?

Veeva CRM Standard Metrics is a set of values that Veeva measures consistently across the industry to establish benchmarks that all life sciences companies can use to evaluate their own performance.

It also defines a common language for downstream Veeva CRM innovations that will make the customer experience more streamlined and HCP-centric.

Measurements from CRM Standard Metrics are incorporated into the Veeva Pulse dataset, and help answer questions like:

- Does my sales team or medical team use remote meetings more often?
- What is the channel mix used by my top-performing sales reps as opposed to other top-performing sales reps at similar companies?
- Do my field teams use CRM Approved Emails more than, less than, or about the same as other field teams of similar size?
- In a given country, do HCPs respond better to phone calls or texts?

How does CRM Standard Metrics help my teams?

In addition to providing industry benchmarks and enabling Veeva CRM product innovations, CRM Standard Metrics offers unique benefits to different teams:

- **Commercial operations leaders** benefit from stronger, more granular benchmarks that inform multichannel adoption, customer channel response, and sales planning.
- **IT and analytics teams** receive faster access to consistent business insights across all teams of the organization.
- **Field teams** get a clearer picture of the most effective practices in the field and a more streamlined user experience. They can also take advantage of new Veeva CRM capabilities built on top of the standardized values in CRM Standard Metrics.

How do I access the insights from CRM Standard Metrics?

You can access Veeva Pulse Data in Veeva Business Consulting engagements or through the Veeva Field Trends report (currently targeted for Q3 of 2022). If your organization is working with the Veeva Customer Success team, you can also request this data through your assigned Customer Success Manager.

Which metrics are included?

Three metrics are tracked within CRM Standard Metrics: two are attributes of the CRM user, and one is an attribute about the interactions recorded in Veeva CRM.

- **User Country** tracks the primary country that any Veeva CRM user operates in with a two-letter ISO code. This is a backend field on the User object that is set by the admin.
- **User Type** records the job function of any Veeva CRM user, whether they are Sales, Medical, Key Account Managers, or Operations and Admin. This is a backend field on the User object that is set by the admin.
- **Call Channel** places each call logged in Veeva CRM into one of six channels: In-person, Video, Phone, Chat or Text, Email, or Other. This is an end user-facing field that is required to submit a call in Veeva CRM.

Will CRM Standard Metrics be mandatory for all Veeva CRM orgs?

Yes, CRM Standard Metrics will be required for all Veeva CRM orgs and platforms beginning on April 14, 2022, with the 22R1 release.

If no action is taken by org admins before that release, all users will be prompted once to select their own User Country and User Type and will be required to select a Call Channel from the Standard Metrics field every time they submit a call.

What if my organization does not allow field teams to use a channel that's part of the standard Call Channel value list?

Admins have the option to gray out certain call channels and make them unavailable for selection by end users. This ensures that submitted calls stay compliant with pre-existing engagement rules.

See [Restricting Call Channels](#) in the CRM Help documentation for more information.

Can I map the Call Channel values to an existing field in my Veeva CRM org?

Yes, admins have the ability to auto-populate the Call Channel field based on the values in another Veeva CRM field or based on the Call record type. This reduces the amount of change management and re-training needed to start using CRM Standard Metrics.

See [Auto-populating the Call Channel](#) in the CRM Help documentation for more details.

Am I able to hide the Standard Metrics Call Channel field from the Call screen?

After the 22R1 release on April 14, the Call Channel field will always be visible for iPad, iPhone, and Windows Mobile users, regardless of page layout. Removing user permissions to the field will prevent the user from being able to submit calls.

When auto-populating the Call Channel is configured, the Call Channel will appear read-only for iPad, iPhone, and Windows Mobile users and should be removed from the page layout for Online users.

Am I able to translate any of the CRM Standard Metrics values?

No, translation is disabled for all CRM Standard Metrics values to ensure consistency across all Veeva CRM orgs. Attempts to translate the values will either be reverted or generate an application error. Veeva will provide translations for all CRM Standard Metrics values in all supported languages.

Can I populate the User Country and User Type fields in bulk?

Yes, the User Country and User Type fields can be dataloaded just like any other Veeva CRM field.

Customers that use both Veeva Align and Veeva CRM can also populate User Country and User Type using Align's Roster Management capabilities. See the [related Align Help documentation](#) for more information.

Where can I find more information about CRM Standard Metrics?

You can read more about CRM Standard Metrics on the [CRM Help page](#), attend our [CRM Standard Metrics office hours](#), or contact your Veeva account team for more information.