



INNOVATION GUIDE
Stakeholder Navigator

Veeva CRM

Overview

Veeva CRM Stakeholder Navigator helps key account managers (KAMs) find the stakeholders that matter, faster.

Embedded within Veeva CRM, Stakeholder Navigator features robust searching and filtering capabilities. KAMs can take advantage of it to pinpoint the accounts they want to focus on. Intuitive visual indicators show users the patterns of influence between stakeholders they can leverage to move the needle.

Stakeholder Navigator is only available in the Lightning-enabled version of Veeva CRM Online. Your Veeva CRM org must have completed the transition to Salesforce Lightning to take advantage of this capability.

You can find resources for making the transition to Lightning [here](#).

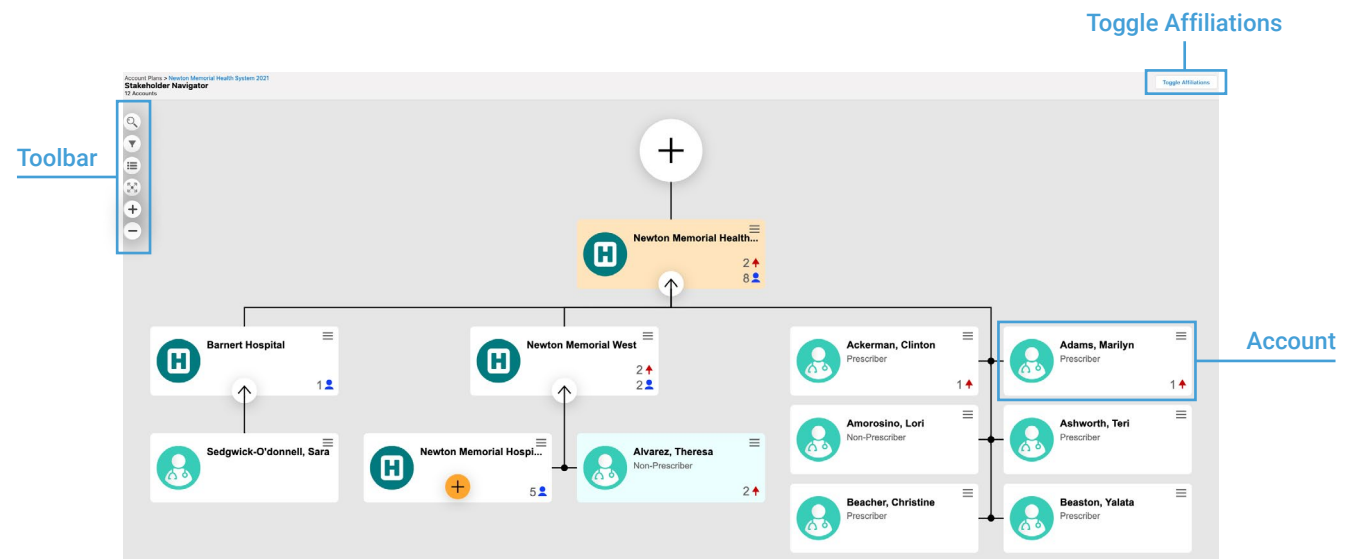


Tips & Tricks

AN INTERFACE DESIGNED FOR YOUR ACCOUNTS

Leave your spreadsheets behind. Account relationships don't have rows and columns, so why should your account management solution?

Stakeholder Navigator is centered around the account hierarchy to match how KAMs think about the stakeholders within an account. It offers a set of exploration functions that make it easy for KAMs to uncover the relationships that power an effective strategy.





Tips & Tricks

The Navigator Toolbar

The toolbar on the left-hand side of the Stakeholder Navigator screen contains six different capabilities for efficient movement throughout the hierarchy of relationships.

	Find accounts: look up specific accounts based on keywords in a search bar
	Filter accounts: narrow down the accounts that show up by specific criteria, like specialty and territory
	Show hierarchy legend: displays a legend for the visual elements used in the interface
	Display the full hierarchy: opens all child account relationships in the hierarchy
	Zoom in to the hierarchy
	Zoom out of the hierarchy

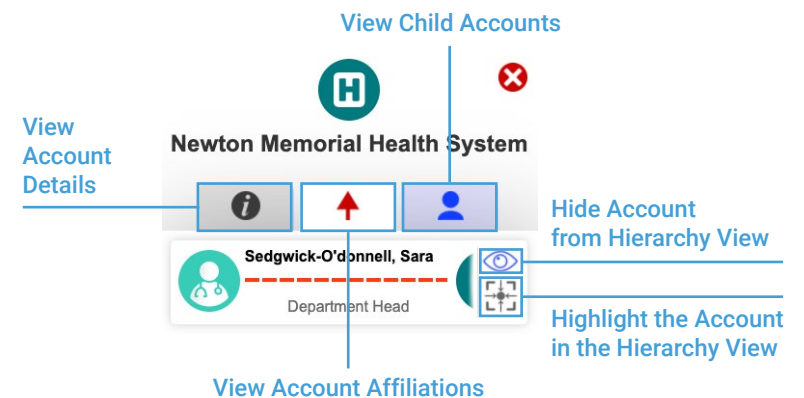
Toggle Affiliations

Affiliations are “soft” relationships between accounts that are not a professional or business association—for example, one health care professional (HCP) mentoring another HCP. This button toggles the display of arrows that denote the affiliations between accounts in the Stakeholder Navigator.

Seeing the affiliations between stakeholders helps KAMs identify influence relationships and prioritize stakeholders that have decision-making leverage across an organization.

Account Information Cards

Click on any account in the hierarchy to open a pop-out with basic information about the account like email, specialty, affiliations, and child accounts.





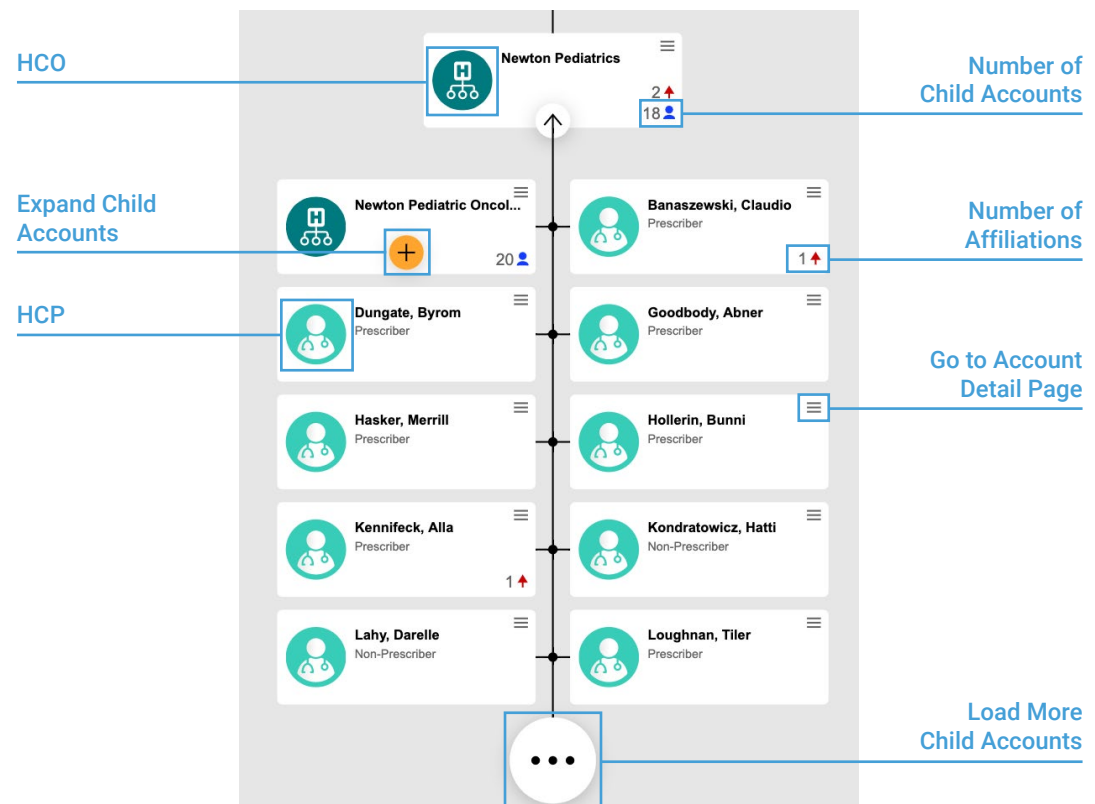
Tips & Tricks

A CLEAR VISUAL LANGUAGE

A picture is worth a thousand words. Symbols and visual elements throughout the Stakeholder Navigator screen guide KAMs to important insights about each account, so they spend less time interpreting information and more time using it.

The Hierarchy Tree

Accounts in the navigator are shown as a relationship tree that can expand to show more accounts or close to show fewer accounts. The image below shows Newton Pediatrics, a health care organization (HCO) account, and its Child Accounts in the tree interface, making it simple to understand the structure within the HCO at a glance.

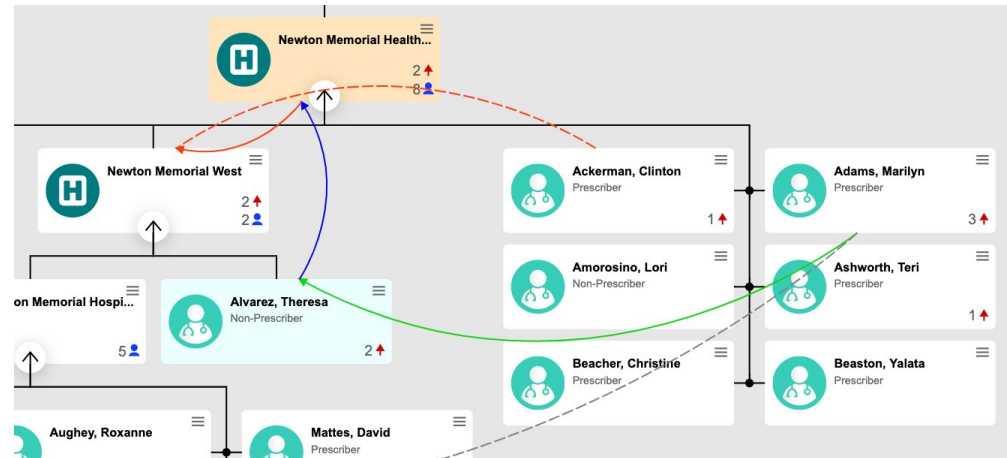




Tips & Tricks

The Affiliation Legend

When set to display, curved lines that indicate affiliations between accounts appear between account cards. Each line color and line pattern means a different type of relationship.



Line Type	Meaning
- - - - - Dashed line	Affiliation without influence
————— Solid line	Affiliation with influence
—————> Arrow starting from Account A with the arrowhead pointing at Account B	Account A influences Account B Account B is influenced by Account A
————— Blue line	Strong affiliation
————— Green line	Medium affiliation
————— Red line	Weak affiliation



Tips & Tricks

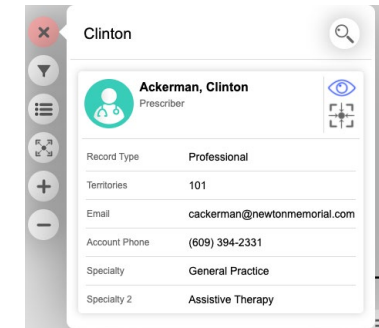
ZERO IN ON WHO'S WHO

The right accounts are always at your fingertips. Powerful search and filter functionality enable KAMs to explore their universe of accounts and uncover high-value relationships between stakeholders.

Finding Accounts

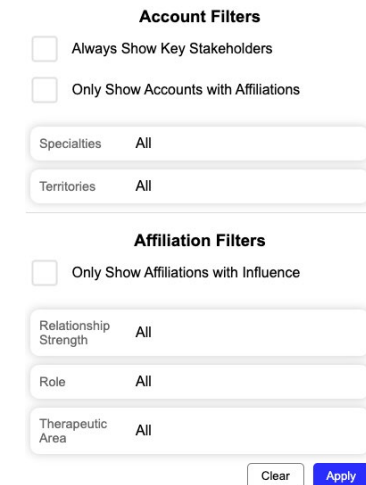
KAMs can click the magnifying glass button in the top-left corner of the navigator screen to display the Find Accounts search bar, which lets them look up accounts based on the details from the account information cards within the navigator.

Selecting an account from the list of generated results shows the KAM the account's basic information and lets them locate it in the hierarchy with the crosshairs icon.



Filtering Accounts

Clicking on the filter icon in the left-hand toolbar brings up the Filter Accounts pop-up, letting KAMs narrow down the accounts they see in the hierarchy according to preset criteria.





Resources

Demo

- [Stakeholder Navigator Demo](#)

Documentation

- [Stakeholder Navigator](#)
- [Key Account Management Lightning Business App](#)
- [Getting Started with Veeva CRM and Lightning](#)

Related Innovation Guides

- [Veeva CRM Desktop Experience](#)

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