



INNOVATION GUIDE

# Attendee Management

**Veeva** Vault CRM Events Management

# Overview

**Veeva Vault CRM Events Management makes managing event attendees easier and more efficient throughout the event lifecycle.**

A memorable attendee experience at an educational event can go a long way in helping healthcare professionals (HCPs) broaden their knowledge about new treatments. But if your teams are spending most of their time on manually keeping track of attendees in the background, it can take away from the time they need to deliver the perfect front-of-house experience.

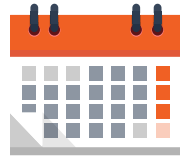
Events Management saves your teams valuable time by reducing the admin work required to manage your attendees. A set of specialized attendee management features give the entire events team the tools to collect and collate attendee information into a comprehensive view of attendee status, eliminating the manual data loading and matching required to move attendee data between systems.

Using attendee management features, event organizers can:

- Search for and invite attendees directly from Veeva Vault CRM
- Generate a digital registration form to collect attendee information
- Allow attendees to sign in digitally via QR code or custom links
- Reconcile attendees to HCP records for faster closeout and compliance reporting

All invitee, registrant, and attendee data are stored in **Vault CRM** to give a complete picture of the HCP journey across engagement channels.

# Benefits of Attendee Management



## FOR EVENT ORGANIZERS

- Track the end-to-end journey of an HCP from planning to expenses in one place
- Manage event content specific to attendees, such as invitations and registration forms, directly from Vault CRM
- Close out events with a simplified process and user interface



## FOR IT AND COMPLIANCE

- Prevent noncompliance with attendee-specific business rules
- Create event-specific registration forms with no custom development
- Maintain a unified view of the customer by reconciling attendee records to existing accounts



## Tips & Tricks

### FINDING THE RIGHT PEOPLE

When planning an event, event organizers in Events Management start with full access to the accounts assigned to them in Vault CRM. Account lists and views help organizers browse through their customers intuitively, while search and filter functionality allows them to pinpoint just who they need.

Sometimes, an attendee that an organizer wants to invite is outside of their assigned territory. In these cases, organizers can trigger an outside-of-territory search, which allows them to invite any HCP in the broader customer universe to their event.

The screenshot shows an iPad screen with the 'Add Attendees' interface. At the top, it says 'iPad' and '9:58 AM' with a 94% battery level. The title is 'Add Attendees' with a 'Done' button. Below the title is a search bar with a dropdown menu showing 'All Accounts (825)' and a 'Search' button. To the right of the search bar is an 'Advanced' link. The main content area is divided into two columns. The left column lists accounts with a green checkmark next to 'Ackerman, Cassie'. The right column shows the details for 'Ackerman, Cassie', including a blue 'Add Attendee' button, a note about the last heard date, her specialty (Cardiology), credentials (Prescriber, MD), address (4637 Chabot Drive, Suite 210, Pleasanton, CA 94588), and a table of recent events.

| Account   | Details  |
|---|--|
| A Center For Dermatology<br>Dermatology<br>39 Newton Sparta Rd, Newton, NJ 07860              |  |
| Ackerman, Clinton<br>Cardiology<br>9673 Millbrook Rd, Newton, NJ 07860                        |  |
| Ackerman, Cassie<br>Cardiology<br>4637 Chabot Drive, Suite 210, Pleasanton, CA 94588          | <b>Ackerman, Cassie</b><br>Add Attendee<br>The selected attendee last heard this topic on 10/25/2016<br>Specialty: Cardiology<br>Credentials: Prescriber, MD<br>Account Identifier: 4637 Chabot Drive, Suite 210 Pleasanton, CA 94588<br>Addresses (1): 4637 Chabot Drive, Suite 210 Pleasanton, CA 94588<br>No active cycle plan. |
| Adams, Robert<br>Cardiology<br>234 O'Leary Street, Dublin, NJ 94552                           |  |
| Adams, Marilyn<br>Cardiology<br>123 Newton Sparta Rd, Newton, NJ 07860                        |  |
| Adams, Sonny<br>Cardiology<br>123 Main Street, Newton, NJ 07860                               |  |
| ADD INHERITANCE Hospital<br>General Practice<br>203 Somewhere We Know, Belfont, NJ 93333, USA |  |
| Adler, Kathleen<br>Cardiology<br>42 Van Horn Rd, Newton, NJ 07860                             |  |
| Adolphe, Barbara  |  |

| Recent Events (10)      |            |                |           |
|-------------------------|------------|----------------|-----------|
| Event                   | Start Date | Status         | Owner     |
| Summit Speaker East     | 5/21/2018  | Invited        | Dan Jones |
| Cholecap Advisory Board | 4/4/2018   | Signed         | Dan Jones |
| July 24th Event         | 7/24/2017  | Event Canceled | Dan Jones |
| June 26th program       | 6/26/2017  | Signed         | Dan Jones |

The attendee search interface in Events Management



## Tips & Tricks

### STAYING WITHIN REGULATIONS

Want to make sure that invitees haven't attended too many events? Or that organizers haven't invited HCPs with license restrictions? Events Management's **Business Rules Engine** keeps you compliant by automatically checking if HCP attendees or invitees match specific criteria.

The attendance restriction rule within the Business Rules Engine monitors whether an invitee faces any restrictions against an event based on past attendance or meals taken. There are five subtypes of attendance limit rules:

- **Per Attendee:** checks for the number of events of each kind an attendee has been invited to within a defined time range
- **Cross-Event Per Attendee:** checks for the number of events an attendee has been invited to within a defined time range across all event types
- **Meal Opt-In:** checks whether an attendee can be added to an event in a defined time range based on the number of meals the attendee has taken
- **Cross-Event Meal Opt-In:** checks whether the attendee can be added to an event in a defined time range based on the number of meals the attendee has taken across all event types
- **Per Event:** checks that the number of attendees added to an event is within a certain range

Another type of attendee rule in the Business Rule Engine is the attendee restricted product rule, which looks at whether there are any products that an HCP cannot receive information about at the account level. If an event details one of the HCP's restricted products, this rule will prevent the HCP from being added as an event attendee.

### SIMPLIFYING REGISTRATION FORMS

Events Management eliminates the need to develop custom registration portals by allowing event organizers to generate digital registration forms for each event automatically.

Each digital form is assigned a unique link that event organizers can send to invitees using any text channel or a QR code. These forms can also be delivered to invitees using **Veeva Vault CRM Approved Email** and accessed on any device with a web browser so invitees can register from anywhere at any time.



## Tips & Tricks

The registration form accommodates two types of registration: open registrations for events where anybody can register, and targeted registrations that are limited to invitees on a predetermined list. Home office can configure the fields they want each registrant to fill out and define whether fields are required or optional. The form also supports brand and company logos and disclaimers for compliance purposes.

All registrant information is saved in Vault CRM and will undergo a reconciliation process to match the information to existing accounts. The same business rules and approval processes that are configured on the Attendee object will also trigger for any registrants collected through the digital form.

The screenshot shows a digital registration form titled "Getting to Know NATEVBA® (Vevanatib) Efficacy for Your Patients" by Verteo. The form includes fields for Date (12/13/2023), Time (6:30 PM Eastern), Location (Virtual), and Speaker (Katherine Jones, MD, PhD). A description states the program will review clinical efficacy and safety data for NATEVBA® (Vevanatib) for Non Hodgkins Lymphoma, lasting 45 minutes with a Q&A. Below this, a link is provided for non-recipients. The registration fields include First Name (Heather), Last Name (Johnston), Email (heather.johnston@memorial.com), Credentials (dropdown), Phone, License, License State (dropdown), and Question (text area). A "0/40" character count is visible at the bottom right.

The invitee view of a digital registration form

## SIGNING IN USING QR CODES

Managing paper sign-in sheets or a digital sign-in device can be difficult for both event organizers and attendees. Organizers struggle to track them, while attendees often face crowding and frustration when they have to line up to sign in. Events Management solves this problem by allowing attendees to sign in on their own devices through a simple QR code scan.

Organizers can display the QR code from a mobile device or printout, or even send the QR code to attendees via Approved Email. Once an attendee scans the code, the sign-in form opens on their device, where they can input their information.

Event organizers can monitor sign-ins from their own devices in real time to check on attendance and assist anyone who has trouble signing in.



## Tips & Tricks

### RECONCILING WALK-IN ATTENDEES

Events Management ensures that walk-in attendees are recorded accurately and matched to known HCP profiles with a streamlined attendee reconciliation interface. Event organizers can match attendee records to known accounts right in Vault CRM using an intuitive search interface, which eliminates the need for manual data extractions and loads. For organizations using **Veeva Network**, the search for matching accounts extends beyond assigned territories, encompassing the broader customer universe.

If an event organizer can't find a matching profile for a walk-in attendee, the reconciliation interface includes an option to create a new account from the attendee's information. This approach adheres to the existing protocols in your org for new account creation, including any necessary data change requests.

Once a new account is created, the attendee's information is automatically reconciled to that account and their event attendance is logged within their interaction history. This provides a complete record of their engagement with your organization.

Adams, Robert

Done

Needs reconciliation

Smith, John >

First Name

Robert

Last Name

Adams

Email Address

bob.adams@newtonmem.com

Phone

555-123-4567

City

Zip

Dismiss

Search for Matches

1 Adams, Marilyn @Newton Memorial Hospital

Confirm Match

Phone

Email Address

Address

110 E Catherine St, Ste 115, Milford, PA 18337

123 Newton Sparta Rd, Newton, NJ 07860

2 Adams, Sonny

Confirm Match

Phone

Email Address

Address

1 State Only License, Pleasanton, CA 94588

1 State Only, Las Vegas, NV 45678

1 Both valid license, Las Vegas, NV

Only DEA, Newark, NJ 12345

2 Invalid DEA, Valid Regular, Newton, NJ 7860

1 Valid DEA, Valid Regular, Newton, NJ 7860

The walk-in attendee reconciliation interface



# Resources

Ready to try out these attendee management features? The following CRM Help documentation pages can help you get started.

→ **ATTENDEE SEARCHING AND FILTERING**

[Adding Attendees to an Event](#)

→ **BUSINESS RULES ENGINE**

[Event Attendance Rules](#)

[Event Attendee Restricted Product Rules](#)

→ **DIGITAL REGISTRATION FORM**

[Using Attendee Self-Registration with Events](#)

→ **QR CODES FOR SIGNING IN**

[Signing Into an Event Using a QR Code](#)

[Adding QR Codes to Event Print Templates](#)

→ **WALK-IN ATTENDEE RECONCILIATION**

[Reconciling Walk-In Attendees](#)

[Creating New Accounts from Walk-In Attendees](#)

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