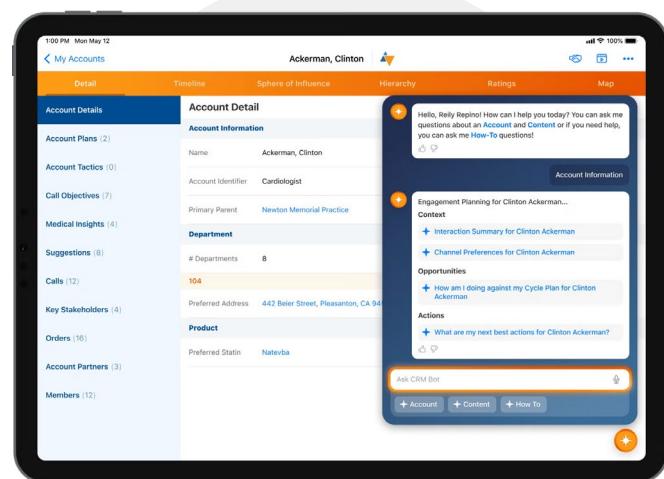


Connecting Sales, Marketing, and Medical

Deep CRM for Life Sciences and the Fastest Path to AI

Drive smarter, more impactful engagement with **Veeva Vault CRM** – a deep, feature-rich CRM for life sciences. Built for the global needs of the industry, Vault CRM supports critical region-specific business requirements and regulatory needs with hundreds of compliance features. Full offline support keeps field teams connected to data and content, wherever they are. As part of the Vault CRM Suite, Vault CRM unifies commercial teams on a single platform, in a single database, with a single view of the customer to drive collaboration, customer centricity, and a more effective field.

Veeva AI in Vault CRM delivers significant productivity gains by maximizing engagement while minimizing prep work and data entry. Field teams better prepare for customer engagements with contextual insights and act on proactive, real-time suggestions. AI powers voice control to transform the user experience and unlocks free text fields to capture rich insights compliantly.



Business Benefits

Seamless Collaboration

Connect sales, marketing, and medical teams to break down silos and coordinate engagement.

Customer Centricity

A single customer view across teams for more personalized interactions and a better customer experience.

More Effective Field

Embedded AI and actionable data deliver deeper insights, faster decision making, and increased productivity.

Key Features

CRM Bot – Coming in late 2025

Drive better engagement planning with CRM Bot, an AI Agent embedded in Vault CRM. CRM Bot is pervasive, contextual, and actionable, and customers can bring their own large language model (LLM) or use a Veeva-provided LLM. CRM Bot leverages the COA methodology, providing context, identifying opportunities, and suggesting actions.

Voice Control – Coming in late 2025

AI-powered **Voice Control** brings voice as a user interface into Vault CRM for hands-free operation of CRM via spoken commands. Record, transcribe, and transpose interactions as well as assign team tasks and other actions.

Compliant Free Text – Coming in late 2025

Built-in AI validation automatically checks free text against company-specific policies and flags concerning entries to help validate compliance while capturing rich information and insights.

Synchronized Sales and Marketing

Deliver a more targeted, personalized customer journey and better engagement with unified campaigns orchestrated through **Veeva Vault CRM Campaign Manager**. With an intuitive interface and standard campaigns built for life sciences, Campaign Manager allows complete control to create and run campaigns quickly and efficiently.

Unified Sales and Service

Elevate customer experience and support by giving inside sales and contact center teams shared data, content, and channels. **Veeva Vault CRM Service Center** is the only life sciences-specific outbound and inbound contact center embedded within CRM, allowing for effortless collaboration, efficient task routing, and faster case resolution.

Strategic Key Account Management

Vault CRM's key account management (KAM) module allows teams to manage strategic accounts effectively within a single, collaborative framework. Create account plans, execute planned activities, and measure progress toward goals across specialty care, primary care, field medical, managed markets, or key account teams.

Omnichannel Engagement

Engage HCPs wherever, whenever, and however they prefer. **Veeva Vault CRM Approved Email** and **Veeva Vault CRM Engage** place teams in front of hard-to-reach HCPs and help them stay connected beyond face-to-face conversations. With full visibility into all interactions, field teams have the information and insights they need to deliver seamless, customer-centric experiences.

Personalized Content at Scale

Equip field teams with up-to-date and highly tailored messaging with real-time access to approved content and personalized delivery options. Optimize content strategy while ensuring compliance with industry regulations using detailed tracking and usage analytics that continually feed back to **Veeva PromoMats**.

Insights at the Point of Execution

Speed time-to-market with brand-specific field insights exactly when and where teams need it. Leverage a library of pre-existing dashboards, develop views using Veeva's extensive partner network, or easily create custom insights across brands, roles, and activities.

Productive Workspaces

Seamless integration with Microsoft 365 tools like OneNote, Outlook, and Teams simplifies call scheduling, accelerates collaboration, and provides a unified workspace for teams. Users easily capture notes, manage calendars, and communicate efficiently in their existing workflow.

Mobile and Offline Access

Activate field teams anywhere and on any device with Vault CRM Suite's adaptive design, which delivers a seamless experience across phones, tablets, and laptops. Unique offline capabilities further allow reps to stay productive, even without internet access.

Built-in Compliance

Designed to adhere to the latest industry regulations, Vault CRM Suite is pre-validated for 21 CFR Part 11, the Prescription Drug Marketing Act (PDMA), and the Ohio Terminal Distribution of Dangerous Drugs (TDDD). Field teams sample and communicate compliantly with features that flag words or phrases that violate regulations in text input fields and proactively block prohibited terms from being sent to an HCP via chat.