

Veeva Vault CRM Events Management

# Virtual Events Innovation Guide



# Overview

Get real engagement from virtual and hybrid events with Engage for Events, a user-friendly virtual meeting tool built on Zoom. It offers an intuitive interface for hosts, speakers, and attendees to share audio, video, and presentations, and it is fully compliant.

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

**All features are available in Veeva CRM and Vault CRM.**

## Speaker Management Key Takaways



Manage virtual and hybrid events in a single platform with Engage for Events.



Simplify event execution by linking Engage for Events with the rest of your Veeva Commercial Cloud.



Benefit from multiple capabilities that help plan and execute field-led virtual events.

## Helping Biopharma Teams

### Event organizers can:

- | Easily manage both virtual and hybrid events in one integrated platform.
- | Connect events data with CRM.
- | Integrate Engage for Events seamlessly with Events Management to have access to all events planning and execution capabilities.

### IT and compliance departments can:

- | Reduce manual work and data silos thanks to the single source of truth for event data.
- | Prevent unauthorized access through unique participant URLs and secure authentication.
- | Benefit from always accurate audit trails.

Veeva's approach integrates event management with CRM systems for comprehensive tracking and efficiency. The two main use cases for events are:

- | Interactive, field-led events using Events Management.
- | Partnering with companies like SpotMe and ON24 to provide additional functionalities.

Integration with any other technology is possible with Events Management to get a 360-degree view. The platform integrates with Salesforce for seamless event management.

# Types of Events Supported

How to get the most out of virtual and hybrid field-led events?  
Utilize all the best features Veeva offers.



## Classic virtual event

- Remote field teams
- Remote attendees
- Interacting via their own devices



## Remote speaker with in-person attendees

- Remote speaker
- All attendees in one physical space



## Hub-and-spoke (hybrid) model

- Remote field teams
- Multiple on-site attendee groups



## Home office/support staff as a hub

- Managing remote interactions
- Supporting physical locations with virtual content

# Capabilities that help plan and execute field-led virtual events

## 1. Send invitations

Use unique tokens to generate individual join links for each attendee, which helps track attendance. Ensure the invitation includes an ICS file for easy calendar integration.

For a more manageable event and smoother experience without additional support, 20-50 participants are recommended.

## 2. Use alternative hosts

Prevent cancellations with alternative hosts, who have most privileges of the main host, but they can't promote others to host/alternative host.

Alternative hosts can also end a meeting if they start it and the main host doesn't join. If the main host joins later, only they can end the event.

## 3. Manage consent

Before sending invitations, ensure that recipients have consented to receive promotional communications and remove those who have not.



When sending Approved Email invitations, recipients who haven't given consent will be automatically flagged. Users can't send the email without removing them.

## 4. Utilize the speaker portal

Speakers can use a dedicated browser-based portal to access event details, download materials like contracts, and join events. This feature is beneficial for speakers involved in multiple events.



Customers can easily configure the portal using their company logo, privacy policy, and many more without help from Veeva Professional Services.

### SPEAKER PORTAL

For assistance email email@domain.com or call 555-555-5555			
Events	Upcoming Events	Past Events	
Contracts			
12 FEB	<b>Medical Education Event</b> Natevba • Natevba Efficacy Organizer - Linda Blackburn		
🕒	<b>Date and Time</b> 12 Feb 2025 - 17:00 12 Feb 2025 - 18:00 Central European Standard Time	📍 <b>Location</b> Elite Spire Hotel 9880 Manor Road London, United Kingdom SK14 7ML	📞 <b>Key Contact</b> None
5 FEB	<b>Medical Education</b> Natevba • Natevba Efficacy Organizer - Linda Blackburn		
🕒	<b>Date and Time</b> 5 Feb 2025 - 12:00 5 Feb 2025 - 13:00 Central European Standard Time	📍 <b>Location</b> Elite Spire Hotel 9880 Manor Road London, United Kingdom SK14 7ML	📞 <b>Key Contact</b> None
31 JAN	<b>Natevba Efficacy</b> Natevba • Natevba Efficacy Organizer - Daphne Rios		
🕒	<b>Date and Time</b> 31 Jan 2025 - 17:35 31 Jan 2025 - 18:35 Central European Standard Time	📍 <b>Location</b> Elite Spire Hotel 9880 Manor Road London, United Kingdom SK14 7ML	📞 <b>Key Contact</b> None
31 JAN	<b>Natevba Efficacy</b> Natevba • Natevba Efficacy Organizer - Daphne Rios		



Learn more about **Speaker Management**

## 5. Make it easy for attendees

The platform allows self-registration through links and QR codes, making it easy to collect attendee information. Use automated email communications for reminders, event links, and follow-ups.

 **Learn more about [Attendee Management](#)**

## 6. Use execution features

- A. Waiting room**
- B. QR sign-in**
- C. Participant lists**
- D. Chat capabilities**
- E. Meeting settings**
- F. Whiteboards**
- G. Backgrounds and effects**

## 7. Enable convenient joining options

Attendees have flexible joining options (like unique trackable links) via apps or browsers.



Users can generate attendee and speaker participant URLs for all child events linked to a parent virtual event when using Event Templates in conjunction with virtual events.

## 8. Share content

Hosts can share various content in addition to CLM presentations in an Engage meeting. Hosts can share their entire screen, including assets or applications outside CRM.

## 9. Record virtual events

Post-event, you can make the recording available through your HCP portal or embed it into an email template to share with attendees.




All recordings are uploaded to the configured Vault and are stored in a new Vault Binder. The binder is labeled with the event's name and date.

10. Track event results


The platform offers detailed attendance tracking, including IP addresses and event participation. Custom surveys and rating systems help gather attendee feedback.

- A. **Feedback Collection:** After concluding the event, redirect participants to a feedback form to gather insights on their experience.
- B. **Tracking Attendance:** Utilize the sign-in QR code and other tracking features to capture information on attendees.

ATTENDEE TRACKING: QR CODE SIGN-IN





Welcome to  
**Extended Discussion on the Treatment of Hypertension**  
Lead by Dr. Quinn Musni, MD



Please scan the QR code to sign in or register to the event.

Sponsored by  

Dear Hilary Entwistle, MD,  
On behalf of Verteo Biopharmaceuticals, we are pleased to invite you the following event.

**Severe Asthma Roundtable**

**This meeting is being held as follows:**

**Date/Time:**  
12/09/2022, 11:00 to 12/09/2022, 12:00

**Location:**  
Shoreline Hotel  
9148 Kings Road  
London, United Kingdom  
G73 7RA

**To sign in to this event, please use the following link:**  
Sign in: <https://crmsingnin.com/akbzjh110bmk7hjok>

If you have any questions or would like further information about the event, please don't hesitate to get in touch.

Regards,  
Tom Whiteoak

## Keep learning

- Hosting a Virtual Event Using Engage – [Veeva CRM](#) | [Vault CRM](#)
- Generating Virtual Participant URLs in Child Events – [Veeva CRM](#) | [Vault CRM](#)
- [Speaker Portal](#)

Get expert guidance  
on how to start using  
**Virtual Events.**



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