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.

Helping Biopharma Teams

Event organizers can:

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

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.



Benefit from multiple capabilities that help plan and execute fieldled virtual events.

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.

Types of Events Supported

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





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.

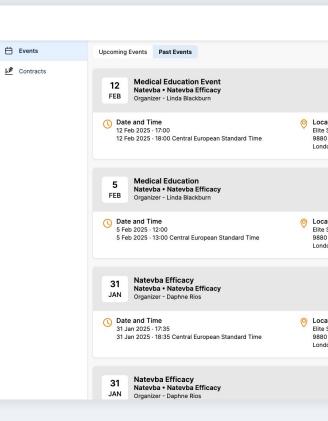
4. Utilize the speaker portal

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.



Professional Services.

SPEAKER PORTAL



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

	Por assistance email email@domain.com or call 555-555-5555	8 ·
cation te Spire Hotel 80 Manor Road ndon, United Kingdom SK14 7ML	Key Contact None	
cation le Spire Hotel 80 Manor Road ndon, United Kingdom SK14 7ML	Son Key Contact None	
cation le Spire Hotel 80 Manor Road ndon, United Kingdom SK14 7ML	Key Contact None	

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

🚽 CholeCap

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.





>	
C	ear Hilary Entwistle, MD, In behalf of Verteo Biopharmaceuticals, we are pleased to invite ou the following event.
ŕ	evere Asthma Roundtable
т	his meeting is being held as follows:
1 L S 9 L	ate/Time: 2/09/2022, 11:00 to 12/09/2022, 12:00 ocation: horeline Hotel 148 Kings Road ondon, United Kingdom i73 7RA
	To sign in to this event, please use the following link: Sign in: <u>https://crmsingnin.com/akbzjhhh1110bmk7hjok</u>
e R	you have any questions or would like further information about the vent, please don't hesitate to get in touch. egards, om 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**

ABOUT US

Veeva is the global leader in cloud software for the life sciences industry. Committed to innovation, product excellence, and customer success, Veeva serves more than 1,100 customers, ranging from the world's largest biopharma companies to emerging biotechs. As a Public Benefit Corporation, Veeva is committed to balancing the interests of all stakeholders, including customers, employees, shareholders, and the industries it serves.

For more information, visit www.veeva.com/eu

Copyright © 2025 Veeva Systems. All rights reserved. Veeva and the Veeva logo are registered trademarks of Veeva Systems. Veeva Systems owns other registered and unregistered trademarks. Other names used herein may be trademarks of their respective owners.

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



