

Veeva Vault CRM

Veeva AI for Vault CRM:

Drive Commercial Efficiency and Effectiveness



Overview

“With Vault CRM, we are on the fast track to personalized, AI-powered customer engagement in 2025 and a clear path for future innovation.”

— **Ozlem Arisoy**
Head of Commercial Digital and Information Technology, Bayer

“By embedding AI into every step of the customer journey — from how practitioners receive valuable information about our portfolio to how they engage with our field force — Veeva is ideally positioned to support us in our mission to deliver life-changing medicines to patients worldwide.”

— **Greg Meyers**
Executive Vice President, Chief Digital and Technology Officer,
Bristol Myers Squibb

“We are excited to expand our long-standing partnership with Veeva by moving to Vault CRM. We share a deep commitment to advancing medicine and are excited to explore the potential of Veeva AI to help drive commercial execution to the next level.”

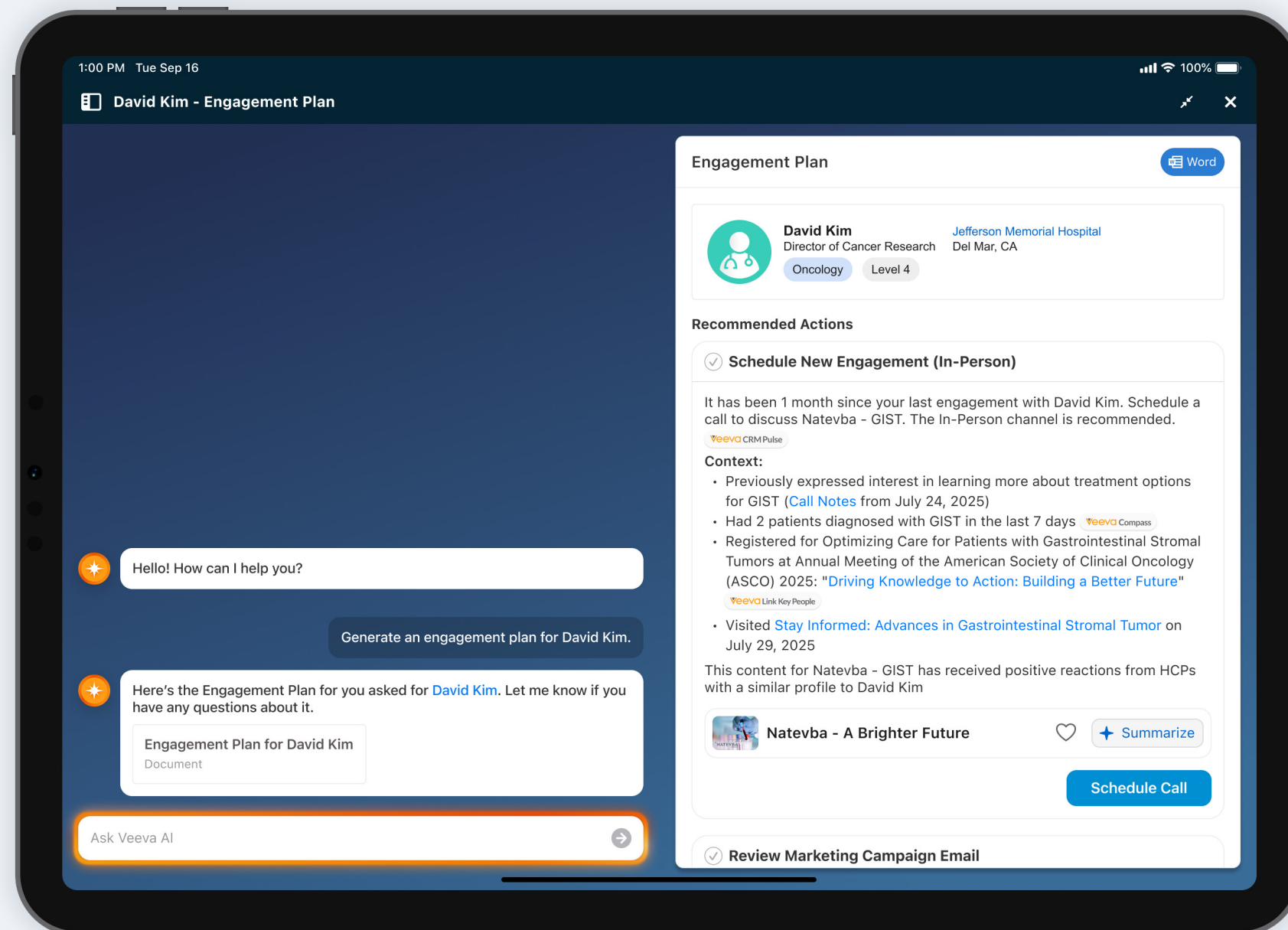
— **Anna Åsberg**
Global CIO, Gilead Sciences

GenAI is a new computing paradigm — with a technological impact comparable to the launch of the internet or cloud computing.

Veeva AI is agentic AI for the life sciences industry and uses these new, transformational capabilities to significantly increase industry productivity. With Veeva AI, agents are built into the core of the Vault platform, on the same level as the foundational components of data and content. Because of this unique architecture, these agents have direct, secure access to data and content.

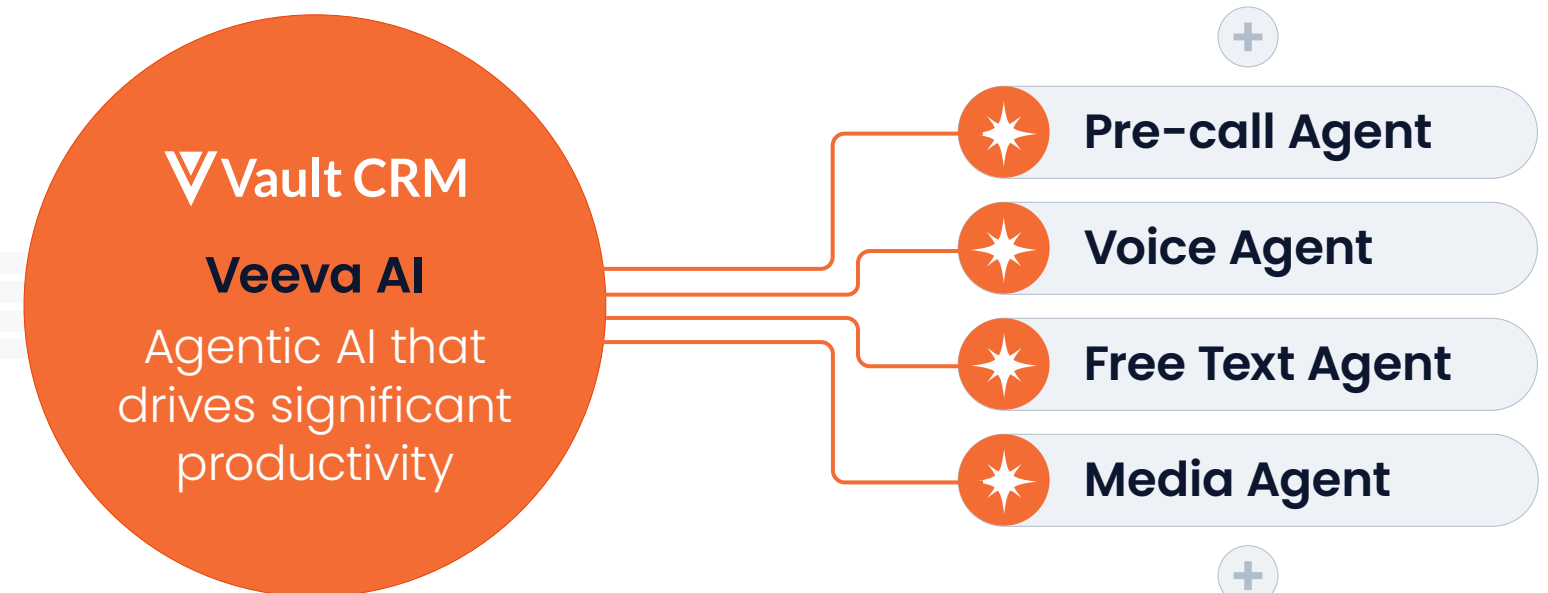
Veeva AI agents are highly specialized for the specific use cases of the life sciences industry and run in Veeva’s deep, industry-specific applications — providing them the deep application and use-case context to be highly effective. And just like other core capabilities of the Vault platform, customers can configure and extend Veeva-delivered AI agents and build custom AI agents to address company-specific needs.

Pre-call Agent, Voice Agent, Free Text Agent, and Media Agent are the first AI Agents in Vault CRM, available in December 2025.



Veeva AI, directly in users' workflows

The first of hundreds of AI agents planned for the Vault Platform

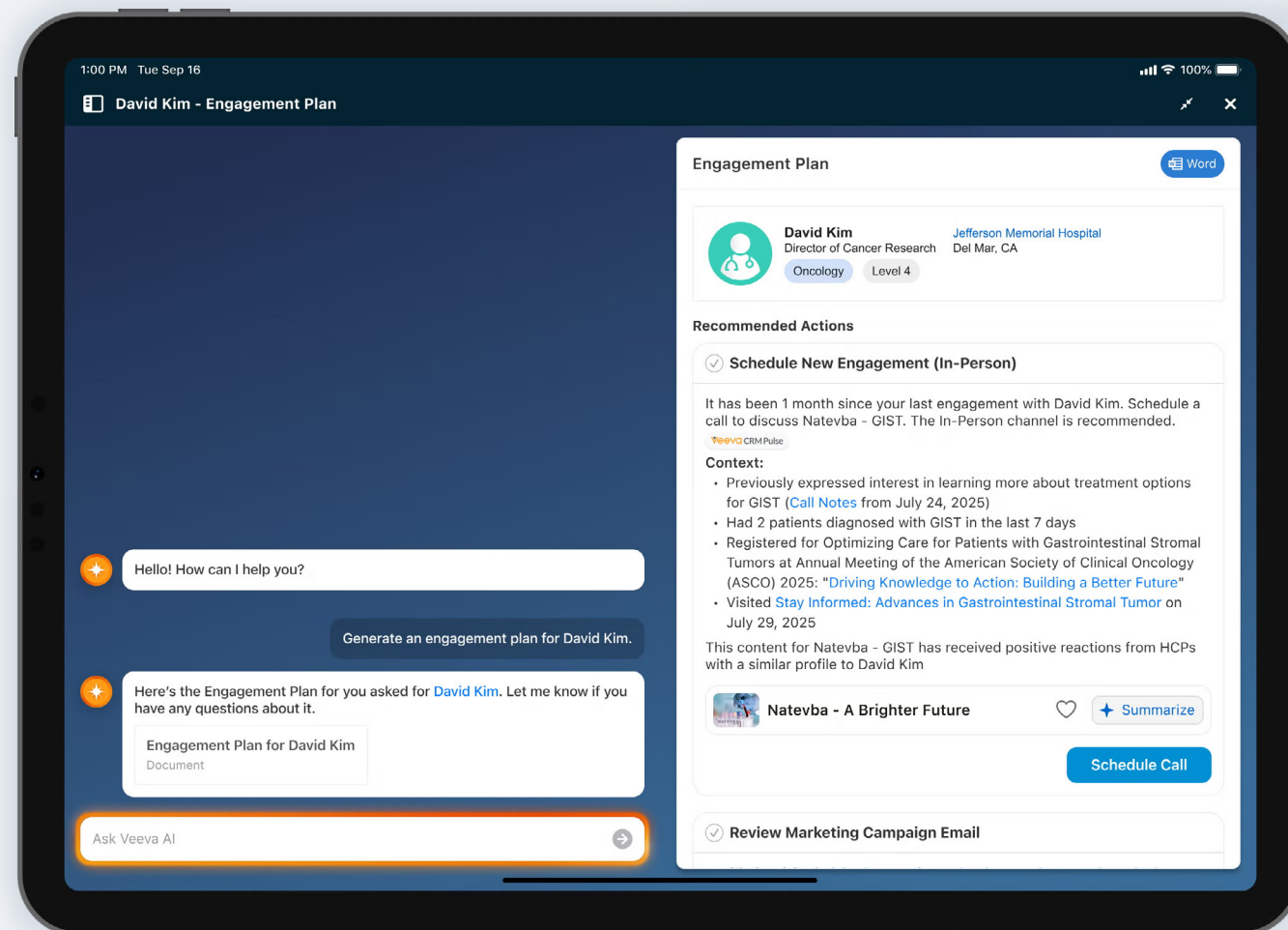


Pre-call Agent

Pre-call Agent in Vault CRM is pervasive and context-aware, providing individualized customer context, opportunities, and suggested actions to:

- Maximize customer engagement opportunities
- Minimize preparation and data entry
- Proactively inform account planning and execution

The engagement plan this agent delivers contains a rich summary and an overview of suggested actions, plus the 'why' behind them, using signals from multiple sources including CRM call notes, external data on patient diagnoses, and information about event attendance.



This and other images are conceptual UI designs subject to change.

USE CASE

Better engagement planning: Intelligence and next-best actions tailored to individual HCPs are delivered proactively to inform account planning or execution.

[See Demo](#)



Voice Agent

Voice Agent transforms the CRM experience by allowing users to leverage voice as the new user interface for CRM, saving time and effort when entering information into CRM. This agent helps field teams capture and act quickly on valuable insights.

With Voice Agent’s ability to capture rich information seamlessly, stakeholders across sales, marketing, and medical rapidly know what was discussed and can better plan for their next touchpoints. For example, through a voice-captured call report, this agent:

- Records call details and key messages
- Can set team tasks and other actions

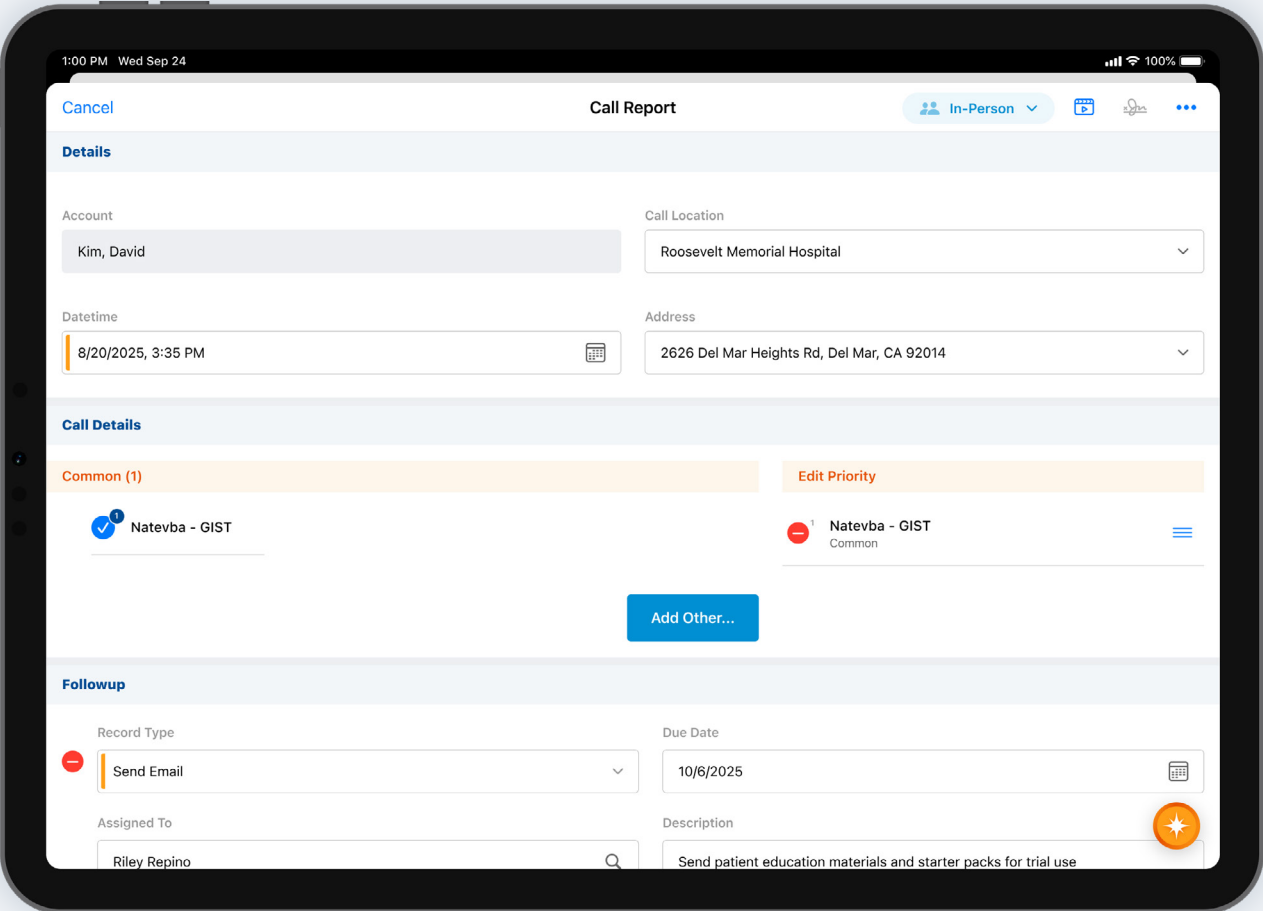
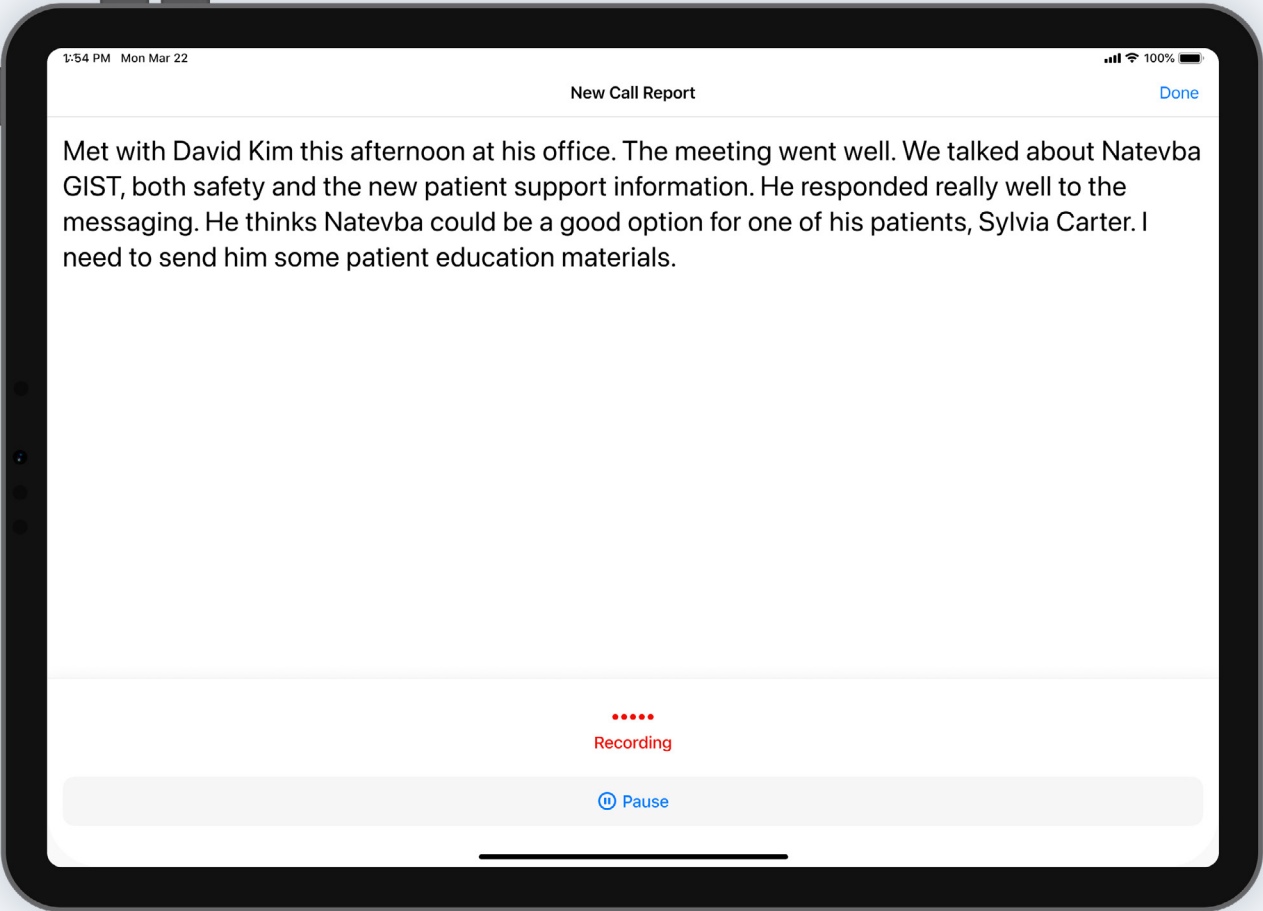
USE CASES



Capture information through natural language:
Voice-to-data entry records, transcribes, and transposes voice notes in real-time.

Hands-free CRM: Navigate Vault CRM with your voice.

See Demo



Free Text Agent

To ensure regulatory compliance, life sciences companies often limit or restrict reps from capturing free-form notes from HCP interactions. The ability to record free text notes provides tremendous opportunity for customer and account coordination, but allowing it without oversight can introduce risk. Free Text Agent unlocks free text for the life sciences industry, allowing these rich insights to be captured compliantly. As field teams enter voice or typed notes, it auto-checks for compliance in real time and flags statements or phrases that require review.

Free Text Agent:

- Uses a company's specific compliance policies, phrases, and keywords
- Ensures human intervention for any compliance issues it detects
- Can be configured to save history of compliance checks based on company policy

5:54 PM Wed Sep 24

Cancel Call Report In-Person

Professional Information

Account: Ackerman, Clinton Datetime: 8/20/2025, 3:35 PM

Record Type: Call Report Location: 2626 Del Mar Heights Rd, Del Mar, CA 92014

Call Notes

Notes **Problem Detected**

Drug discussed Zefranta. Key Points Covered. Reviewed recent Phase III study showing 32% improvement in HbA1c control compared to baseline after 12 weeks. Highlighted once-daily dosing and favorable GI side effect profile. Discussed patient case study with Dr. Ackerman where Zefranta may be beneficial due to renal safety profile. One of his patients, Sylvia Carter, did report a rash after taking Zefranta. Follow-Up: Dr. Ackerman requested patient education materials and starter packs for trial use with appropriate patients. Plan to follow up in 3 weeks after initial patient starts to gather feedback.

Safety: One of his patients, Sylvi... Error: Sylvia Carter Remove All

Samples and Promotional Items

BRC

Samples

USE CASE

Real-time compliance checks

AI checks text- and voice-entered free text for compliance, flagging potential problems to effectively mitigate risk.

See Demo



Media Agent

The most impactful customer interactions use relevant, personalized content to relay complex science to HCPs. Field teams that can access this information quickly will use it more often to tell a treatment's success story.

Media Agent:

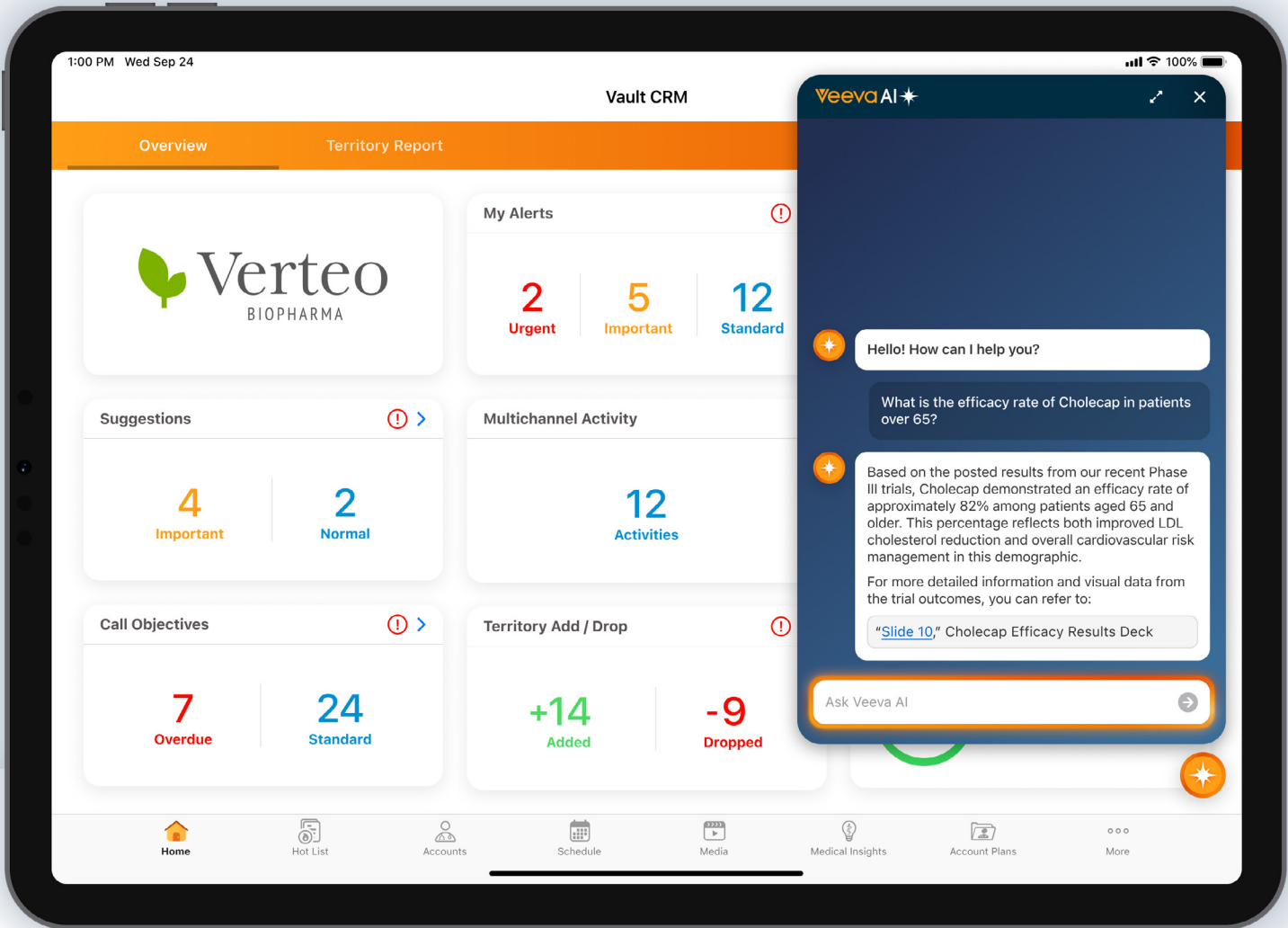
- Uses semantic search within any content library
- Locates, summarizes, and launches content instantly

USE CASE



Semantic content search: Find and surface relevant content intelligently, simplifying the search for approved, compliant materials.

See Demo



Life sciences specific Agentic AI is in Vault CRM. Achieve coordinated customer engagement and increased commercial productivity with Veeva AI in Vault CRM.

See a demo of Veeva AI for Vault CRM. 

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

