

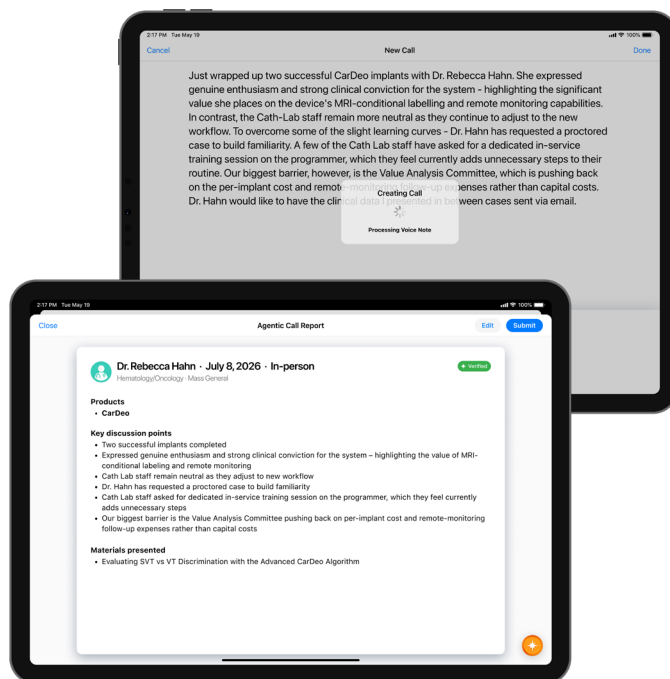
Vault CRM Suite

Agentic Engagement Platform for Medtech

Leveraging AI to Get the Right Therapies to More Patients

Drive smarter, more impactful engagement with **Veeva Vault CRM** - the agentic CRM purpose-built for medtech. Unifying sales, marketing, and medical teams on a single platform with a single database, it delivers a unified view of the customer to drive seamless collaboration and customer-centric execution.

AI in Vault CRM delivers industry-specific agentic capabilities - such as contextual insights, conversational voice controls, and compliant free text data capture - to maximize field productivity while eliminating prep work and manual logging. With full offline support on iPad and iPhone, field teams stay fully connected to critical account data and compliant content, wherever care is delivered.



Business Benefits



Improve Field Speed and Productivity

Embedded AI removes administrative friction to deliver deeper insights, faster decision making, and increased productivity.



Achieve True Customer Centricity

Gain a single, shared customer record to orchestrate more personalized interactions and a better customer experience.



Generate Commercial Evidence™

Turn daily field observations into commercial evidence to uncover hidden care obstacles and access barriers.

Key Features

✓ Industry-Specific Agentic AI

Embedded **AI in Vault CRM** provides standard industry-specific agentic capabilities to increase commercial agility while maintaining strict regulatory compliance. It provides an open foundation for AI that seamlessly connects your data and embeds external AI agents.

- **Agentic Call Report™**: Effortlessly capture detailed field notes to get real-world context to clear obstacles to care.
- **Agentic Voice**: Enhance user experience and remove friction for data entry by enabling voice input to record, transcribe, and transpose information directly into Vault CRM.
- **AI-Powered Media Search**: Locate, summarize, and launch marketing materials for proactive planning and real-time support during customer interactions.

✓ Open & Interoperable Foundation

- **Vault CRM Data Lakehouse**: enables a zero copy architecture to share and mount your CRM data into your data lakes, like Databricks or Snowflake, for AI and analytics in near real time. The efficient data-sharing architecture makes your CRM data accessible without the need to build and maintain complex, costly replication integrations. Included in Vault CRM license.
- **Seamless External Agent Integration**: Embed external AI agents directly into the Vault CRM interface using an intuitive overlay. These external agents, whether built by partners like IQVIA or developed internally on architectures such as Databricks or Snowflake environments, run seamlessly with full context.

✓ Elevated 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.

✓ Omnichannel Engagement

Engage HCPs wherever, whenever, and however they prefer. Vault CRM unifies your entire commercial ecosystem, seamlessly connecting sales, marketing, and medical teams across **Approved Email, Engage, Events Management, Campaign Manager, and Service Center** on a single, shared database. With full visibility into all interactions, field teams gain the real-time insights they need to deliver continuous, customer-centric experiences.

✓ 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.

 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

Tailor the CRM user experience to help your field focus on what matters most. 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, 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.