

PRODUCT SHEET

Vault CRM Suite

Vault CRM Suite unifies commercial teams and processes for more effective customer engagement across personal and digital channels, with embedded AI for optimized execution.

Vault CRM is an agentic CRM for life sciences that connects sales, marketing, and medical teams on a single platform with a unified customer database and embedded AI.

AI in Vault CRM AI in Vault CRM includes standard industry-specific agentic capabilities embedded in Vault CRM to increase commercial agility and productivity. It provides an open foundation for AI that seamlessly connects your data and embeds external AI agents.

Vault CRM Approved Email is an application for sending personal, compliant emails from field users to HCPs.

Vault CRM Engage is an application for field teams to interact with HCPs using personal and digital channels.

Vault CRM Events Management is an application for managing the end-to-end event lifecycle and related information, including content, attendees, speakers, and expenses.

Vault CRM Align is a field planning application for roster management, territory management, engagement planning, and integrated field feedback.

Vault CRM Campaign Manager is an application for life sciences marketers to orchestrate journeys across digital and field channels.

Veeva Network MDM is a global master data management platform and customer master application designed for global medtechs.

Veeva OpenData is the foundation for commercial data. It is reference data on healthcare professionals (HCPs), healthcare organizations (HCOs), and their affiliations for commercial teams. It is used in CRM, analytics, and data warehouses.

PRODUCT	ANNOUNCED	STATUS	CUSTOMERS
Vault CRM	2022	Mature	100+
AI in Vault CRM	2025	Early	0–10
Vault CRM Approved Email	2013	Very Mature	100+
Vault CRM Engage	2018	Mature	100+
Vault CRM Events Management	2015	Mature	100+
Vault CRM Align	2015	Mature	51–100
Vault CRM Campaign Manager	2023	Early	11–50
Veeva Network MDM	2013	Very Mature	100+
Veeva OpenData	2015	Mature	100+

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Vault CRM

Vault CRM is an agentic CRM for life sciences that connects sales, marketing and medical teams on a single platform with a unified customer database and embedded AI.

It enables key capabilities such as customer profiling, content sharing and management, territory and account planning, key account management, sampling, call center, inside sales, and field engagement. Core capabilities support critical region-specific business requirements and regulatory needs.

Vault CRM is accessible online via a browser and desktop application with full offline support on the iPad and iPhone.

AI in Vault CRM provides built-in, industry-specific agentic capabilities, featuring the Agentic Call Report, Agentic Voice, and AI-Powered Media Search.

Announced	2022
Status	Mature
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Lives with Approved Email, Events Management, Engage, Campaign Manager Connected with PromoMats, MedComms, Align, Network MDM, Link

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AI in Vault CRM

AI in Vault CRM includes standard industry-specific agentic capabilities embedded in Vault CRM to increase commercial agility and productivity. It provides an open foundation for AI that seamlessly connects your data and embeds external AI agents.

Standard Agentic Capabilities

- **Agentic Call Report:** captures compliant free text that uncovers previously undiscovered barriers for actionable insights.
- **Agentic Voice:** enables voice input to record, transcribe, and transpose information directly into Vault CRM, a faster and easier way to capture information and next steps.
- **AI-Powered Media Search:** locates, summarizes, and launches content 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 data accessible without the need to build and maintain complex, costly copy pipelines. Included in Vault CRM license.
- **Seamless External Agent Integration:** Embed external AI agents directly into the Vault CRM interface using an intuitive overlay page. These external tools, whether built by partners like IQVIA or developed internally on your own Databricks or Snowflake environments, run seamlessly with full context.

Announced	2025
Status	Early
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	0-10
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Events Management, Campaign Manager, Engage Connected with PromoMats, MedComms

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Vault CRM Approved Email

Approved Email is an application within Vault CRM that allows users to send compliant emails to HCPs in a unified experience. Users can quickly assemble an email selecting approved templates, content fragments (links in the email), and optional personalization (such as a personal greeting).

Emails can be scheduled and sent on behalf of field users by the home office or suggested by next best action engines.

Email activity (such as sends, opens, and click-throughs) is automatically captured and recorded in Vault CRM, providing insight about content and engagement effectiveness.

Announced	2013
Status	Very Mature
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Engage, Events Management, Campaign Manager Connected with PromoMats, MedComms

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Vault CRM Engage

Engage is an application for field teams to interact with HCPs using personal and digital channels. Users can chat compliantly with HCPs and staff, schedule meetings, meet in video calls, and share approved content. Field team access Engage directly in Vault CRM, while HCPs can access via a browser or a mobile application.

Engage integrates with third-party channels such as Microsoft Teams, WhatsApp, Zoom, and SMS, giving field teams flexibility to meet HCP preferences.

All engagement activity is automatically captured in Vault CRM to maintain built-in compliance and governance across interactions.

Announced	2018
Status	Mature
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Approved Email, Events Management, Campaign Manager

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Vault CRM Events Management

Events Management is an application for managing the end-to-end event lifecycle and related information, including content, attendees, speakers, and expenses. This application supports multiple field-initiated event types, such as speaker programs, advisory boards, roundtables, and other fee-for-service engagements.

Users can create event requests, identify compliant content, determine budget and expenses, identify speakers and attendees, and initiate approval workflows.

Events Management works seamlessly with Approved Email for attendee invitations, PromoMats for approved content, Engage for virtual event content sharing, and Vault CRM or OpenData to reconcile attendees for transparency reporting.

All events activity is automatically captured in Vault CRM.

Announced	2015
Status	Mature
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Approved Email, Engage, Campaign Manager Connected with OpenData, PromoMats, MedComms

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Vault CRM Align

Align is a field planning application for roster management, territory management, engagement planning, and integrated field feedback. This application is powered by business rules to manage current and future alignments, including the definition of the territory, the target customer list, and engagement goals by channel.

End users can provide feedback on proposed future alignments and engagement plans directly within Vault CRM.

Announced	2015
Status	Mature
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	51–100
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM Connected with Veeva Territory Designer

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Vault CRM Campaign Manager

Campaign Manager is an application for life sciences marketers to orchestrate journeys across digital and field channels.

This application enables segmented, multi-action campaigns including marketing email, field email, and field suggestions, with additional channels to come. Point-and-click audience creation and guided workflows speed campaign execution.

Campaign Manager lives with Vault CRM, which means that all data, content, workflows, and metrics are in one place. This enables collaboration across customer-facing teams and leads to better sales and marketing performance.

Announced	2023
Status	Early
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	11–50
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Approved Email, Engage, Events Management Connected with PromoMats

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Veeva Network MDM

Network MDM is a global, multi-domain master data management platform and customer master application for medtech. This application comes with a pre-defined data model to support the management of customer reference data, including data change requests from field teams in Vault CRM. Companies can master their reference data alongside data from a third party, such as OpenData, to ensure a single source of truth for customer data.

The Network MDM business portal and widgets allow access to customer data for commercial business users.

Companies can build additional data domains (such as product or payer) for data mastering beyond customer.

Announced	2013
Status	Very Mature
Customer type	Medtech, Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Application-specific
Integrations	Connected with Vault CRM, OpenData, Nitro

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Veeva OpenData

OpenData is the foundation for commercial data. It is reference data on healthcare professionals (HCPs), healthcare organizations (HCOs), and their affiliations. It is used in CRM, analytics, and data warehouses.

OpenData has a global data model following Veeva's Common Data Architecture for Life Sciences™ to simplify software and data integrations.

Announced	2015
Status	Mature
Customer type	Medtech, Enterprise Pharma, Biotech
Customers	100+
Platform	Application-specific
Integrations	Connected with Vault CRM, Network MDM Connected via Veeva IDs with Link