

# Veeva CRM

Coordinated Execution.  
Multichannel Engagement.  
Ensured Compliance.



“With Veeva, our reps work efficiently, our customers engage quickly, and we have documented savings.”

*Executive Director of Commercial Analytics, Merz*

Veeva CRM is an advanced, multichannel solution for the life sciences industry, addressing the needs of the pharmaceutical, biotech, animal health, and consumer health markets. It offers prebuilt functionality for all field personnel of all types, including primary care and specialty care representatives, and managed markets account executives. With the life sciences commercial landscape growing increasingly complex, companies must employ new strategies for reaching a broad group of multifaceted customers. This group of customers has expanded beyond healthcare providers (HCPs) to include integrated delivery networks, accountable care organizations, and group practices. Veeva offers the deep CRM capabilities needed for true multichannel engagement with this diverse set of customers, enabling companies to orchestrate and tailor outreach across multiple channels and manage more complex customer relationships in a coordinated way. Veeva CRM is more than just a CRM system. It's an end-to-end multichannel solution to improve customer centricity.

## Integrated Multichannel CRM

Veeva CRM is the first fully integrated multichannel CRM solution for life sciences that enables companies to plan, execute, and measure interactions across all customer channels. Customers demand access to information anytime, anywhere, via their channel of choice. They expect consistent and personalized interactions that quickly deliver relevant information. Field users need the flexibility to access customer and account information on demand without compromising usability or performance. Veeva multichannel CRM is a unique offering that provides mobile applications with built-in closed loop marketing (CLM) for face-to-face meetings, Veeva CRM CoBrowse for guided web navigation and collaboration, Veeva CRM Approved Email for compliant email, and Veeva CRM Engage for online interactions. All channels are provisioned by a single, global repository of compliant content. Veeva CRM is integrated with Salesforce Service Cloud for call center capabilities and self-service portals.

## Coordinated Execution

Key account management plays a crucial role in managing and delivering messages to a multifaceted, organized customer such as an IDN (Integrated Delivery Network) or a hospital system. Veeva CRM's flexible framework meets the requirements of the account-based selling model by therapeutic area or by the portfolio of products and services. By integrating the account planning process into CRM, sales operation teams can get a better view into each employee, service, and activity's impact upon the customer. Veeva CRM allows

you to profile your customers and visualize the hierarchy of organizations. The system helps you set objectives, create a plan, and implement tactics to coordinate activities across all internal teams. By connecting internal groups like marketing, sales, and compliance, you can easily identify the best content and services for the most effective campaign execution. You have the ability to associate all planned activities with the relevant stakeholders in the customer organization for effective engagement.

## Robust Compliance

Veeva CRM ensures compliant interactions and operations. The system is fully validated for 21 CFR Part 11 and PDMA compliance. And with the completion and full documentation of all IQ and OQ tests, customers save up to 80 percent of their system validation costs, while eliminating the corresponding project time. Veeva CRM provides capabilities for Sunshine Act expense capture, e-signatures, sample limits, and sample tracking. To conform to CAN-SPAM laws, field reps can get approvals from HCPs right on their mobile devices.

## Mobile CRM

Field users need the flexibility to access Veeva CRM anytime and anywhere. Veeva CRM Mobile, built from the ground up for the iPad and Windows 8 platform is designed to take advantage of each device's unique form factor, navigation, and capabilities. It is available both online and offline with automatic synchronization to improve productivity.

## Role-based functionality

Every user group will experience the application as if it were created just for them. Veeva CRM's tailored functionality caters to the specific needs of primary and specialty care sales representatives, managed markets users, and MSLs. And with each group on the same CRM system, team selling is finally easy to manage. Here is a sampling of role-specific functionality:

### Primary Care

- Multichannel cycle plans
- Call reporting with integrated mobile CLM
- Counterpart collision avoidance
- E-signature capture
- Integration with expense management
- Materials ordering
- Medical event attendee sign-in
- Multichannel calendar
- Physician and account profiling
- Samples management
- Timeline view of multichannel interactions

### KOL Management

- All primary care capabilities, plus:
- Account plan creation and tracking
  - Detailed KOL planning and profiling
  - Meeting brief capture
  - Visual sphere of influence

### Specialty Care

- All primary care capabilities, plus:
- Closed loop account planning and execution
  - Visualization of complex account hierarchies
  - Group call reporting
  - Surveys to capture feedback
  - Plan and formulary data analysis
  - Surveys to capture feedback

### Managed Markets

- Specialized capabilities include:
- Detailed account planning for MCOs, health plans, PBMs, and hospital networks
  - Formulary matrix for analyzing intricate formulary data
  - Meeting brief capture

## Consumer Health and Animal Health

Veeva CRM also provides capabilities to increase the productivity of field reps for consumer health and animal health. Functionality like route planning, planograms for inventory monitoring, and order management integrated with CLM, is built into mobile application for a seamless user experience. The integrated contract management and pricing engine helps field reps create orders efficiently and easily monitor inventory against listing contracts.

## Guided Interactions

Leveraging the power of data science, Veeva CRM Suggestions helps you deliver a better, more coordinated customer experience by offering recommendations on the best action and right channel for the next customer interaction. Since it's a part of Veeva CRM, recommendations are provided right in the reps' workflow where and when they need it. With the Veeva Data Science Connector companies have the flexibility to use the data science technology of their choice or internal solutions, quickly and easily. The interactive Suggestions Dashboard gives reps the opportunity to offer feedback to improve future suggestions (coming Fall 2015).

## Actionable Insight

Veeva CRM's streamlined, cloud-based VInsights database houses prescription, sales and customer interaction data, providing field personnel and sales management the insight needed to make informed decisions. Veeva CRM includes easy to use online and offline reporting for sales and sales management. Interactions with customers across channels are also captured for analysis. This multichannel insight helps sales and marketing plan customer engagements and continuously improve the customer experience.



Actionable insights

## Multichannel Content Distribution

Seamless integration of Veeva CRM with Veeva Vault PromoMats replaces manual handoff that is prone to human error and compliance risk. You can now easily distribute, update, or withdraw content across all channels to ensure consistency and compliance. Vault PromoMats also provides a complete audit trail from content creation to expiration.

## Better Events with Greater Compliance

With seamless integration to Veeva CRM Events Management, you have the power to create any event type, gain needed approvals, collaborate with vendors, manage budgets and attendee invitations, collect signatures, and more.

Transfer of value tracking, and budget adherence to maintain compliance have never been easier. Total visibility into speaker and attendee information and easy call recording provide a no-hassle way to follow up with event participants.

## Easy Access to Accurate Customer Data

Field reps can add or request changes to customer profiles quickly and easily. Interoperability with Veeva Network Customer Master application and Veeva OpenData Customer Data ensures fast, accurate data updates so your commercial teams are always productive—and compliant.

## Up-to-Date Alignments

Seamless integration with Veeva Align ensures commercial teams have fast access to the latest assignments without disruption. Dynamic alignments delivered in minutes make it easy to adjust to changing market conditions, ensuring field teams are back in the field on the first day of each new sales cycle.

## Single System Administration

You can configure Veeva CRM to meet your unique needs. Simply make a change once and watch it appear everywhere. The same configuration, security settings, and data sharing rules are consistently applied across all end-user devices.

## Platform for Extensibility and Innovation

Veeva is built on the Salesforce1 Platform, so you benefit from both Veeva and salesforce.com innovation. It also means that you have access to salesforce.com functionality, such as Service Cloud for call centers and self-service portals.

## Cloud Advantage – Speed and Adaptability

Improvements happen behind the scenes at no extra cost with Veeva CRM. With system enhancements arriving multiple times per year, innovation is automatic. And with cloud-based Veeva CRM, you will never run another version upgrade project. It's our responsibility to make it work, each and every time.

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