

UPSHER-SMITH

# Upsher-Smith Streamlines Free-Text Monitoring with Veeva CRM Approved Notes

## Sales reps build deeper customer relationships with compliant note capture

Upsher-Smith Laboratories manufactures a wide variety of generics, as well as brand medications for seizure disorders and migraine headaches. Upsher-Smith sales reps use Veeva CRM for customer engagement, but previously used a third-party system to analyze their call notes for compliance. By using free-text monitoring with Veeva CRM Approved Notes, Upsher-Smith replaced the need for that system, streamlined the process, and improved the field force experience.

### Compliant Free-Text Monitoring Included in Veeva CRM

Included with Veeva CRM, Approved Notes streamlined Upsher-Smith's process for entering and monitoring notes. Reps easily enter post-call notes and follow-up activities for their customers.

Upsher-Smith benefits from Approved Notes by:

- Allowing reps to easily capture free-text notes directly in Veeva CRM
- Flagging suspicious words or phrases, and offering suggestions for rephrasing
- Helping reps maintain compliance with every interaction

#### UPSHER-SMITH – AT A GLANCE

- U.S. HQ: Minneapolis, MN
- Established: 1919
- Focus: Generic and branded pharmaceuticals for seizure disorders and migraine headaches
- Veeva Commercial Solutions Used:
  - Multichannel Veeva CRM
  - Veeva OpenData
  - Veeva Vault PromoMats

### A Seamless Implementation

Upsher-Smith implemented Approved Notes with a comprehensive keyword list within weeks. "The speed and the ease of implementation were very appreciated," said Darran White, manager of sales operations for Upsher-Smith. "The implementation team provided very quick, top-of-the-line service, which is what we've come to expect from Veeva."

Veeva CRM Approved Notes gives Upsher-Smith's sales reps an easy-to-use solution for entering and monitoring free-text notes. Approved Notes ensures compliance with their sales reps' call notes and allows them to build deeper relationships with their customers.

“ Approved Notes allows our reps to capture detailed notes, insights, and next steps directly into the account record in Veeva CRM. Free-text monitoring combs through post-call notes for words and phrases that we find egregious so we can address the issue. ”

– Darran White, Manager of Sales Operations, Upsher-Smith