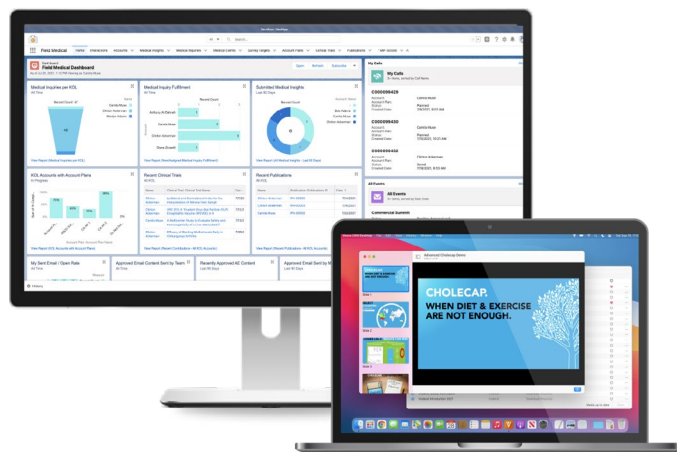Introducing the new

# Veeva CRM

## Desktop Experience

Leverage the full potential of Salesforce Lightning, the next-generation online user interface, to unlock the latest Veeva CRM innovations.

While iPads are still the primary device for many field teams meeting face-to-face with healthcare professionals (HCPs), modern reps work in a hybrid environment and will interact across multiple channels and devices all requiring a great user experience. Innovations in Veeva CRM bring all the capabilities available on the iPad to macOS or Windows PCs, as well as the iPhone, and Android. Built on the modern Salesforce Lightning framework, Veeva CRM's new desktop experience meets the needs of user groups spending time on activities where mobile devices may have been limiting their productivity.

## Key Business Benefits

- **Streamlined navigation:** save time with a more intuitive user experience that simplifies day-to-day activities.
- **Role-based design:** support how teams work through role-specific apps and customizable workspaces optimized for the way users engage with customers.
- **Data-centric interface:** guide users to data-driven decisions with insights, dashboards, and reports right in their workflow.
- **Simplified content flow:** find, assemble, present, and share CLM content from the computer and make remote conversations more insightful, accessible, and efficient.

## Veeva CRM Desktop Experience – Two Purpose-built Applications
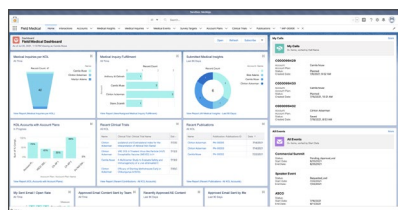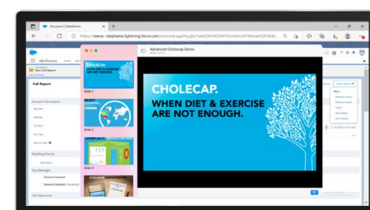
**Veeva CRM Browser**
Updated version of Veeva CRM Online
*accessible through an internet browser*

**+**
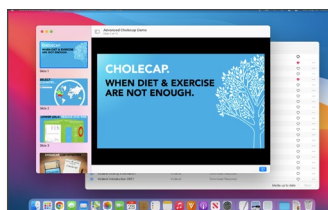
**Veeva CRM Desktop App**
New dedicated companion app
*focuses on remote content sharing*

**=**

**Veeva CRM
Desktop Experience**

## Veeva CRM Browser:
## Transform Your CRM Experience From Data Entry to Workflow Productivity

Veeva CRM browser moves the Veeva CRM Online application off the legacy Salesforce Classic framework and onto modern Salesforce Lightning: the new interface preserves many familiar features from Salesforce Classic so users can make a seamless transition.



Classic
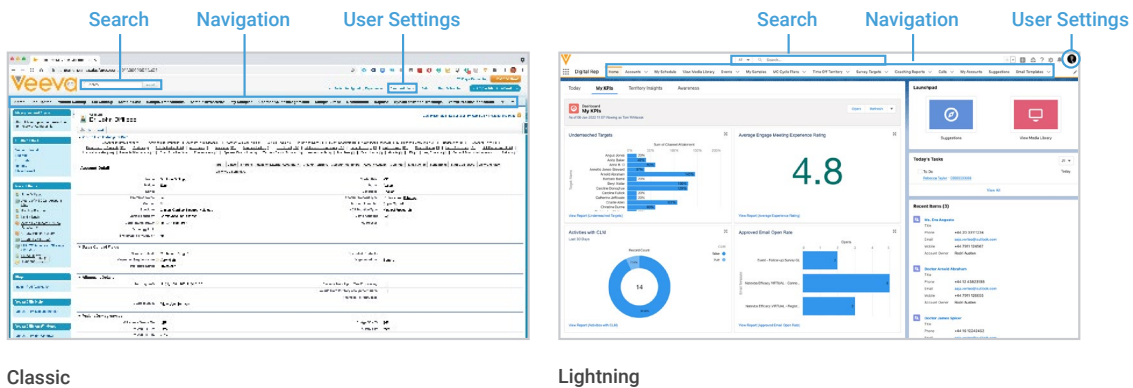


Lightning

### A workspace for every role

Our ready-to-use Veeva CRM Lightning Business Apps enhance how your teams already work. Embedded dashboards and reports help guide users to data-driven decisions in their workflow. Each Business App we provide is customizable, so you can bring in the widgets and features that best suit your needs.

Veeva CRM gives you access to six prebuilt apps included with the Veeva CRM license:

### Digital Rep App
Help reps identify where they can make the most impact at a glance with easy access to daily activities, KPIs, and activity planning.

### Field Medical App
Help medical science liaisons build deeper KOL relationships with a workspace dedicated to metrics for medical inquiries, insights, and scientific activity.

### Key Account Management App
Key account managers can get a clearer picture of their targets across teams using account plan breakdowns, account hierarchy information, a stakeholder navigator interface, and call objective reporting.

### Pharmacy Sales App
Emphasize insights pharmacy reps need to provide the best service through reporting components for orders, deliveries, and calls.

### Brand Operations App
Show marketing users the performance and adoption of their assets in the field across channels with an array of detailed dashboards.

### Event Coordinator App
Enable events teams with a streamlined, end-to-end view into all event planning workstreams, from speakers to expenses.

Use the Lightning App Builder, a drag-and-drop interface, to quickly deploy new page layouts to the field. The palette of components offers a high degree of customization to fuel your business processes.

**!** **Get started fast! Veeva will stop supporting existing Veeva CRM capabilities on Salesforce Classic at the end of 2023.**
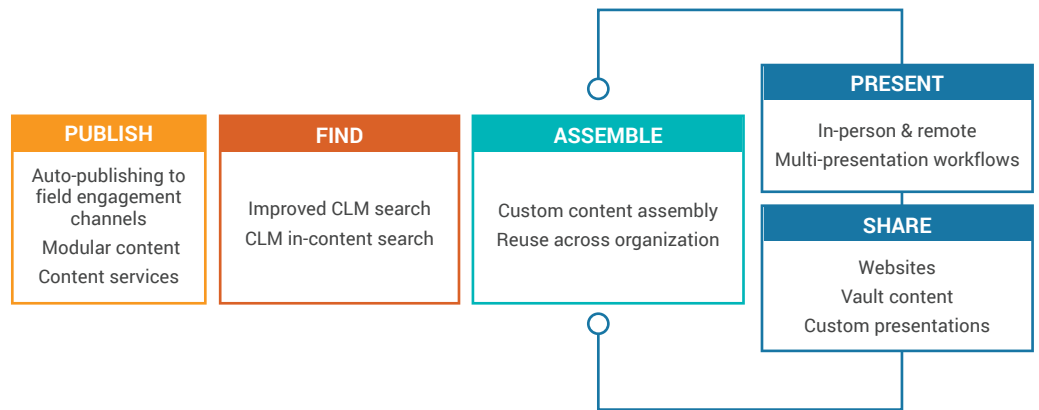
# Veeva CRM Desktop App: Enabling the End-to-End Content Flow From Desktops

Veeva CRM Desktop is the companion desktop app to Veeva CRM Browser that streamlines the journey from content publishing to field remote engagement, taking advantage of the more robust screen space and computing power of desktop computers.

The app allows your teams to find, assemble, present, and share their CLM content from their computer quickly and conveniently through robust content library features. With Veeva CRM Desktop, field teams can share content across various remote meeting platforms, including Veeva CRM Engage, Zoom, and Microsoft Teams. Content usage can be traced automatically, making it easy for your teams to log engagement details and for the home office to follow the content performance.

**Veeva CRM Desktop App**

| **PUBLISH** | **FIND** | **ASSEMBLE** | **PRESENT** |
|---|---|---|---|
| Auto-publishing to field engagement channels | Improved CLM search | Custom content assembly | In-person & remote |
| Modular content | CLM in-content search | Reuse across organization | Multi-presentation workflows |
| Content services | | | |

| **SHARE** |
|---|
| Websites |
| Vault content |
| Custom presentations |

*Automatic tracking of all media activity provides a complete view of customer interactions to analyze engagement and improve content*

# Getting the New Desktop Experience

To take advantage of Veeva CRM's full range of desktop capabilities, you must enable your Veeva CRM org for Salesforce Lightning. New desktop experience features are built into the Lightning interface to enable more advanced configurations, more user-friendly features, and better productivity.

### How do I get started with the Lightning transition?

When considering the Lightning migration, the first step is the technical migration to enable your Veeva CRM org for Lightning capabilities. The second step is experience optimization to tailor the Lightning experience for your business strategy and processes. Veeva can provide resources and support for transitioning from Salesforce Classic to the modern Salesforce Lightning framework. Contact your account executive to discuss a Lightning transition plan for your organization.

### When should I plan the transition to Lightning?

Start planning now. Veeva will stop supporting existing Veeva CRM capabilities on Salesforce Classic at the end of 2023. After the support ends, if you have any support tickets, the first step will be a migration to the Salesforce Lightning framework. The sooner you transition, the sooner you will benefit from faster, more productive teams.

**My field teams are all on iPads. Why should I upgrade to Lightning?**

Even if the majority of your Veeva CRM users are accessing the platform via iPads, there is still significant value for other groups that may require access through a browser or where mobile devices like the iPad or phones limit their productivity. Examples of these groups are: the corporate office or administrative staff supporting the field team, medical teams, key account managers, market access teams, specialty reps, digital reps, or even some sales managers. As Veeva CRM continues to advance, new innovations may require the enabling capabilities of Lightning. To ensure an undisruptive experience for your field teams, Veeva recommends all customers plan their transition now.

| Online Users | Leadership | IT / Enablers |
|---|---|---|
| • Role-specific design supports the needs across Sales, Medical, and Marketing | • Enhanced insights at all levels of the organization | • Easily monitor user status, sync times and aherence to system business rules |
| • Greater awareness of cross-functional activity with your customers | • Harmonize processes amongst teams whilst still allowing tailoring where needed | • Drag and drop editor and reusable Lightning Components allow easy creation of custom apps |
| • Dynamic pages, increasing ease of use and ability to find what is important to your users | • Automation of reporting, saving time and effort | • Responsive design means apps are automatically rendered for use on different devices |

Veeva will end support of the Salesforce Classic Veeva CRM features at the end of 2023. Migration to the Lightning framework helps you with considerations of the long-term support of both home office and field teams.

**Ready to get started?**

- Request a Lightning migration proposal for your Veeva CRM environment
- Discuss proposal and project initiation with your Veeva account team
- Prepare for your Lightning migration in terms of budget, timing, and personnel

For more information, please get in touch with your account executive or visit **veeva.com/lightning**.