

## V Vault CRM Align

Achieve the Right Alignments, Faster



Veeva Vault CRM Align enables collaborative field force management, simplifying and reducing time spent on sales planning.

The seamless integration between Veeva Vault CRM and Vault CRM Align allows commercial teams to operate in a more agile and dynamic way. Field teams can create alignments in days instead of weeks, re-allocate roster members, target the right customers with the most effective channels, and provide rep feedback directly from Vault CRM.

### Global Multichannel Sales Planning that Enables Organizations

**On-Demand**  
territory updates

**Agile:** Align supports evolving go-to-market programs with speed, sophisticated rule capability, and process flexibility to create alignments on demand. Teams can develop flexible alignments across business units, geographies, and markets. This helps optimize each field team's alignment program through unique timelines, business rules, and governance.

**95%**  
time reduction

**Real-time Collaboration:** Fully integrated with Vault CRM, Align reduces manual handoffs and the need for custom integrations. It allows teams to recognize and resolve alignment errors before sending them to downstream systems. By replacing spreadsheets with a master system for past, present, and future alignments, Align simplifies processes to deliver fast and accurate alignments.

**10x**  
fewer steps

**Efficient:** Align's collaborative, data-driven approach increases sales effectiveness by creating fast and dynamic alignments in a centralized master system, ensuring adequate resources for each customer. Preview alignments in minutes and simplify end-to-end processes, reducing significant alignment change times by 95% or more.

"Align is **10 times faster** than our previous solution. We have more confidence in how we allocate our salespeople against products and territories."

— Ian Knowlton, Senior Director, Commercial Operations, Astellas

[Watch Video](#)

## Features and Benefits

Veeva Vault CRM Align manages geography, roster member, product, customer, and target assignment to the territory to significantly speed up alignments, reduce administrative burden, and lower costs compared to non-integrated solutions.

### Seamless Integration with Vault CRM

Schedule imports of live customer data from Vault CRM, ensuring your alignments are built on the most current and accurate customer data. Create alignments with future start dates and let Align manage the data loads to Vault CRM for you.

### Roster Management

Ensure accurate rep coverage and maximize sales impact. Quickly manage vacations and time out of territories, and reduce human error by eliminating reliance on manual data entry, email, and spreadsheets.

### Target Planning with Multichannel Cycle Plans

Define simple or complex criteria to segment channel activity across your customer base. Prioritize activity goals to your unique customer segments and business needs. Drive simple, face-to-face cycle plans, or take your multichannel engagement to the next level by including goals for Veeva Vault CRM Events, Veeva Vault CRM Approved Email or custom channel activities.

### Robust Rules Engine

Support complex criteria using geography, customer profile, and relationship data to drive assignments. Expand your thinking about assignment rules, ensuring a more robust and accurate approach to territory and target plan creation.

### Integrated Territory Feedback

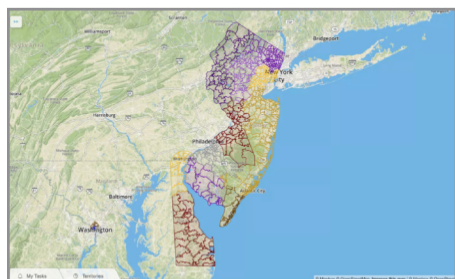
Get early territory feedback directly from Vault CRM, providing greater visibility and an opportunity for the rep's voice to be heard. Eliminate spreadsheets and significantly reduce potential for errors in your feedback process.

### Territory Modeling

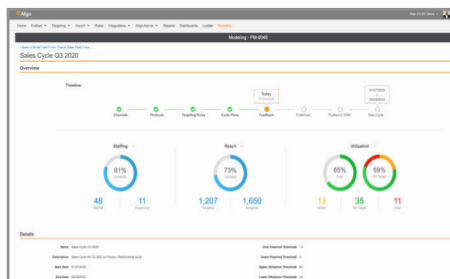
Allocate your resources accurately by modeling alignment, roster, and targeting changes to optimize results. Compare models and leverage the reporting platform to choose the best alignment for your teams.

### Workday Integration

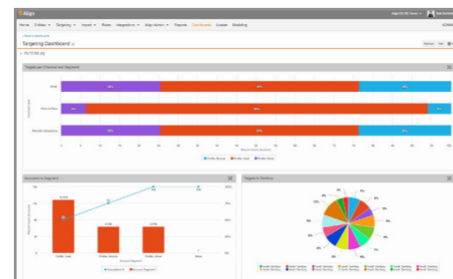
Populate three systems—Workday, Align, and Vault CRM—with a single data entry point. Allow HR teams to regulate what employee information is shared to Align and Vault CRM using Workday's secure Reporting-as-a-Service (RaaS) capability. Changes in Workday automatically refresh in Align and Vault CRM to display up-to-date information.



Visualize territories and account assignments



Create multichannel cycle plans integrated with Vault CRM



Generate reports on modeling, production, and historical data