

 Clinical Operations  $\Leftrightarrow$   Medical CRM

## Bring transparency to HCP interactions across clinical study and field medical teams

While clinical research associates (CRAs) and medical science liaisons (MSLs) often interact with the same investigators and other healthcare providers (HCPs), there is limited visibility into their activity details as each group uses separate, siloed systems. Uncoordinated interactions and inefficient communication can often frustrate sites and investigators, negatively impacting engagement and hampering study enrollment.

The Veeva Clinical Operations to Medical CRM Connection bridges the gap between study teams and MSLs, driving collaboration and visibility at scale to get treatments to patients faster.

Quickly get answers to questions such as:

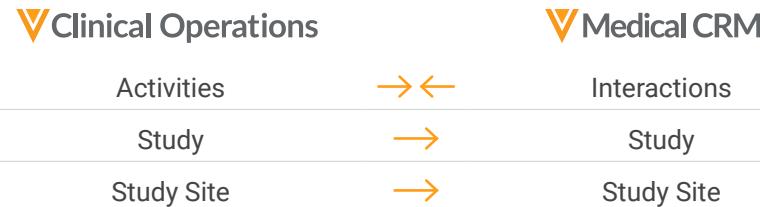
Clinical	Medical
<ul style="list-style-type: none"><li>When is the MSL scheduled to go onsite?</li><li>What topics related to my study did the MSL speak to the HCP about?</li><li>Who on the medical affairs team can help me improve enrollment metrics?</li></ul>	<ul style="list-style-type: none"><li>Which trials are this HCP/investigator involved with?</li><li>What was the latest communication with the site?</li><li>Where do sites need assistance in enrolling subjects?</li></ul>

### Benefits

- Optimize cross-functional coordination:** MSLs can share critical information on local clinical trends and patient needs, enabling data-driven decision-making by study teams.
- Strengthen relationships with HCPs:** Streamline communications to improve engagement and identify future endorsement opportunities.
- Improve study outcomes:** Ensure efficiency and success of trials by utilizing field medical's knowledge and relationships with HCPs to support enrollment.

## How it Works

The Veeva Clinical Operations to Medical CRM Connection seamlessly passes records and updates between the two systems. Field mappings bridge the terminology differences between Veeva Clinical Operations and Vault CRM, such as persons and accounts.



This means you can log activities for a certain study against a person and transfer those to CRM for complete transparency and alignment. Get visibility to the person, date of the interaction, communication channel (in-person, video, phone, chat/text, email, other), status (completed or planned), and who owns each record if additional support is needed.

**Vault Clinical**

Personnel

Home Planning Study Info Study Management Library Study Startup Global Directory Reports Study Personnel & Communication

1 of 1 records in this list

Investigator: Dr VanNostrand

Details

Clinical Activities (6)

Medical Activities from CRM (5)

Contact Information (2)

Study Participation (6)

Education (1)

Certifications (1)

Related Documents (5)

Workflow Timeline

Employment Relationship (0)

Activity ID Person Channel Subject Date Complete

ACT-000012 Dr VanNostrand Phone Recruitment Support 03 Nov 2022 Yes

ACT-000013 Dr VanNostrand In-Person Discuss new Protocol 31 Oct 2022 Yes

ACT-000017 Dr VanNostrand Phone Recruitment Support 12 Jun 2023 Yes

ACT-000024 Dr VanNostrand Phone Recruitment Support 12 Jun 2023 Yes

**Veeva Medical CRM**

Field Medical Home Accounts Medical Inquiry Fulfillments Survey Targets Account Plans Clinical Trials Pubs and Docs Key Medical Insight Medical Insights More

Account Dr. VanNostrand + Follow Record Activity Stakeholder Navigator Create Medical Insight New Medical Inquiry Send Email Edit View Overview View Reports Change Owner

Customer Interactions (10+)

10+ items - Sorted by Date - Updated a minute ago

Call Name	Record Type	Subject	Status	Date	From
C000031124	Vault Clinical Interact...	Discuss Protocol	Submitted	10/24/2023	Tom Frattarola (tom.frattarola@veev...
C000031123	MSL Meeting Brief	Investigator Meetings	Submitted	7/19/2023	
C000031128	Vault Clinical Interact...	Exclusion Criteria Ques...	Submitted	7/13/2023	
C000031070	Vault Clinical Interact...	Recruitment Support	Submitted	6/12/2023	Tom Frattarola (tom.frattarola@veev...
C000031121	MSL Meeting Brief	Roundtable Meeting	Submitted	6/12/2023	
C000031122	Vault Clinical Interact...	Recruitment Support	Submitted	6/12/2023	Tom Frattarola (tom.frattarola@veev...
C000031068	Vault Clinical Interact...	Recruitment Support	Submitted	11/3/2022	Tom Frattarola (tom.frattarola@veev...
C000031065	MSL Meeting Brief	Investigator Meeting	Submitted	11/2/2022	
C000031064	MSL Meeting Brief	Assess Investigator/Sit...	Submitted	11/1/2022	
C000031069	Vault Clinical Interact...	Discuss new Protocol	Submitted	10/31/2022	Tom Frattarola (tom.frattarola@veev...

Event Attendees (Account) (0)

See the Veeva Clinical to Medical CRM Connector in action.