



INNOVATION GUIDE

Content Management

Veeva Vault CRM Events Management

Overview

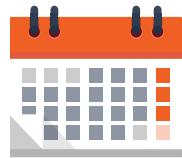
Veeva Vault CRM Events Management's content management capabilities simplify content creation and delivery by integrating event materials directly into an organizer's event workflow.

As healthcare professional (HCP) engagement expands into more channels, event organizers must manage more content across more mediums than ever before. For a single event, an organizer might have to prepare email invitations, digital sign-in forms, physical signage, interactive speaker decks, paper handouts, online surveys, and more.

Events Management helps organizers manage event content of all types from a single, unified interface—the same one they use for event execution. Content sending is built into the execution flow, with business rules to ensure organizers use the right types of content for each event.

An integration to **Vault PromoMats** and **Vault MedComms** pulls MLR-approved content directly into Events Management, eliminating the errors and redundancy from manual content loads. An embedded email template designer in Vault helps home office users create custom email templates with a simple point-and-click interface.

Benefits of Content Management



FOR EVENT ORGANIZERS

- Send emails, access print templates, and display virtual event content directly from Events Management
- Track email status and take necessary follow-up actions



FOR MARKETING

- Create event materials seamlessly and quickly using the embedded BEE Editor in Vault PromoMats and Vault MedComms
- Measure content usage through content reporting in **Veeva Vault CRM**, Vault PromoMats, and Vault MedComms



FOR IT AND COMPLIANCE

- Cut down on manual content loads with an integration from Vault PromoMats and Vault MedComms that automatically pulls content into the right events
- Enforce mandatory event materials for events through business rules



Tips & Tricks

MOVING CONTENT FROM REVIEW TO EXECUTION

The handoff between the end of the content approval process and the use of content in an event is often time-consuming for operations teams. The Vault to Events Management integration removes many of the manual steps involved in this handoff, ensuring your print and email content flows where it needs to be automatic.

Alignment rules defined in Vault PromoMats or Vault MedComms match content to the right event types, and the integration then loads the content into the corresponding event records in Events Management. New events that match the criteria in the alignment rules will also have the correct content pieces attached to them.

The screenshot shows a Veeva Vault PromoMats interface. The main view displays a document titled "Verteo Event Contract (v1.0)" with the status "Approved". The document content includes the Veeva logo and text about the agreement's effectiveness and parties involved. The right side of the screen shows the "INFORMATION" panel with detailed document properties like Name, Product, Title, Type, Document Number, and various lifecycle and metadata fields.

Veeva Vault PromoMats integration download

The integration also covers content updates and deletions. If a piece of content gets updated in Vault, the integration will automatically update all versions of the content in Events Management to match the latest edition. Deletion of content from Vault will also remove all versions of the content from the Events Management side.



Tips & Tricks

SENDING EMAILS FROM THE EVENT WORKFLOW

Field teams are busy enough as is, and their inboxes show it. Why force them to dig through their other work emails to keep track of their event-specific threads?

Events Management lets the field send event-related emails using Veeva Vault CRM Approved Email from the event workflow. Email templates can be loaded into Events Management from Vault PromoMats or Vault MedComms to ensure all messaging has been approved through MLR. At the same time, contact lists are generated from the event attendees and invitees selected by the event organizer.

The screenshot shows the 'Preview and Send' screen in Veeva Vault CRM. The top bar displays the date and time (9:17 AM, Thu Apr 4) and battery level (100%). The main area is titled 'Preview and Send' with a 'Back' button. Below the title, it shows the 'Email Template' (Cholecap Events Management Invitation - Registration), 'Last Sent' (20/03/2024, 13:11), and a 'slide to send' button. The preview window shows the recipient (Ackerman, Clinton <clinton.ackermann@newton-memorial.com>) and subject (You're Invited to Attend the Cholecap Speaker Program). The email content includes the CholeCap logo, links for 'Prescribing Information' and 'Important Safety Information', and a message to Dr. Clinton Ackerman. It details the event: Cholecap® - Cardiac Involvement in LDL Cholesterol, Lloyd's Café & Event Location, 28/03/2024, 17:00. It also mentions Clinton Ackerman and Marilyn Adams as speakers. A registration link is provided: <https://signin-app-us.veevacrm.com?tr=register&e=a32DS000000nJbYAEo=00D1F0000000pk7UAA&k=11b3929b644d7c8b8072fc7217d972bcd4a3d451ab2693461ec167cdc80e79&a=a30DS000002jR4YAI&email=clinton.ackermann%40newton-memorial.com>. The message concludes with 'We are looking forward to having you.' and 'Please click on the attachment to add this event to your calendar.'

Approved Email template

After an email is sent, Approved Email tracks opens and clicks for both performance and compliance purposes. This helps your event organizers keep track of their interaction history while giving home office teams helpful feedback to help them make their emails even better.

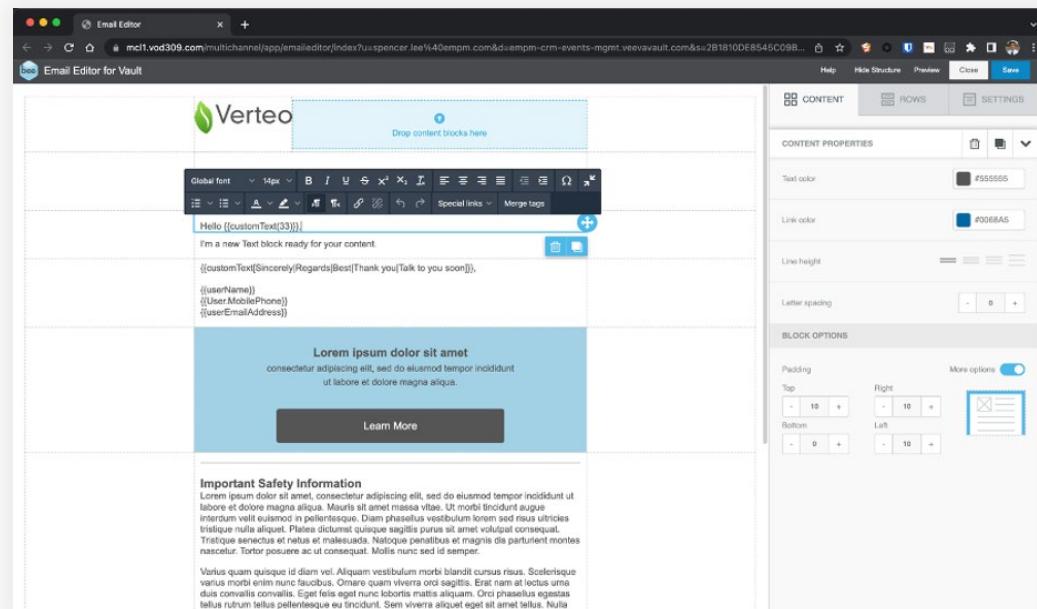


Tips & Tricks

CREATING EMAIL TEMPLATES ON THE FLY

Almost every event today uses email content. If you're custom coding each template, the costs can quickly add up. With Events Management, your teams can easily access a codeless editor for email templates to help you get event emails into the field faster and at scale.

Events Management supports email templates created in BEE Editor, a drag-and-drop tool for creating email templates in Vault PromoMats and Vault MedComms. Using the editor, home office administrators or content managers can design custom email templates in minutes without code and even convert print materials into emails.



The BEE Editor

BEE Editor can also personalize emails with tokens that dynamically update based on event information like an attendee's name, a venue's address, or a seminar's title. These tokens will automatically populate with the event information stored in Vault CRM before an email is sent, eliminating the need for email merges.



Tips & Tricks

REMINDING EVENT ORGANIZERS TO USE CONTENT

The Business Rules Engine in Events Management lets the home office set up guardrails to make sure organizers follow all the compliance and process requirements for an event—including content.

One type of business rule that the engine can enforce is the Required Event Material Rule, which reminds organizers to add materials to an Event record during certain stages in the event lifecycle. For example, this rule can stop an organizer from submitting an event for approval if they don't have a speaker outline and an agenda, or even prevent an event from being closed out if they don't have the speaker's deck.

The screenshot shows the CRM Events Management software interface. At the top, there's a navigation bar with links like Event Coordinator, Home, My Accounts, Events, Speakers, Speaker Nominations, Budgets, EM Catalogs, Venues, Engage for Events Dashboard, and More. Below the navigation is a header for an event titled "Natevba Efficacy" with a status of "Requested". The main content area has tabs for Details, Event Team Members, Event Speakers, Attendees, Event Budgets, Expense Estimates, and More. A modal dialog box is open in the center, titled "Required Event Agenda". It contains the message: "The Following Event Material(s) have Hard Violations" and "Required Event Agenda requires an event material file or attachment." At the bottom of the modal is a "Close" button. To the right of the modal, there's a "Next Steps" section with a "Steps to fulfill in your Event REQUEST" list, which includes "KERS", "PENSE ESTIMATES are", and "ROVAL". Below the modal, there's a "Venue" section with details for Elite Spire Hotel and a "Expense Summary" section with estimated and actual attendance and costs. A large blue circular progress bar on the right indicates a status of "15".

Required Event Material Rule



Resources

Ready to simplify your event content processes? These documentation articles can help you get started:

➔ **VAULT TO EVENTS MANAGEMENT INTEGRATION**

[Integrating Events Management with Veeva Vault](#)

➔ **CRM APPROVED EMAIL FOR EVENTS MANAGEMENT**

[Using Approved Email for Events Management](#)

➔ **BEE EDITOR**

[Using the BEE Email Template Editor](#)

➔ **REQUIRED EVENT MATERIALS BUSINESS RULES**

[Required Event Material Rules](#)

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