

# Integrated Territory Feedback



# Overview

Reps' knowledge and experience are key to sharpening the commercial strategy and improving data accuracy, leading to a more precise targeting plan. However, they aren't always captured in the CRM.

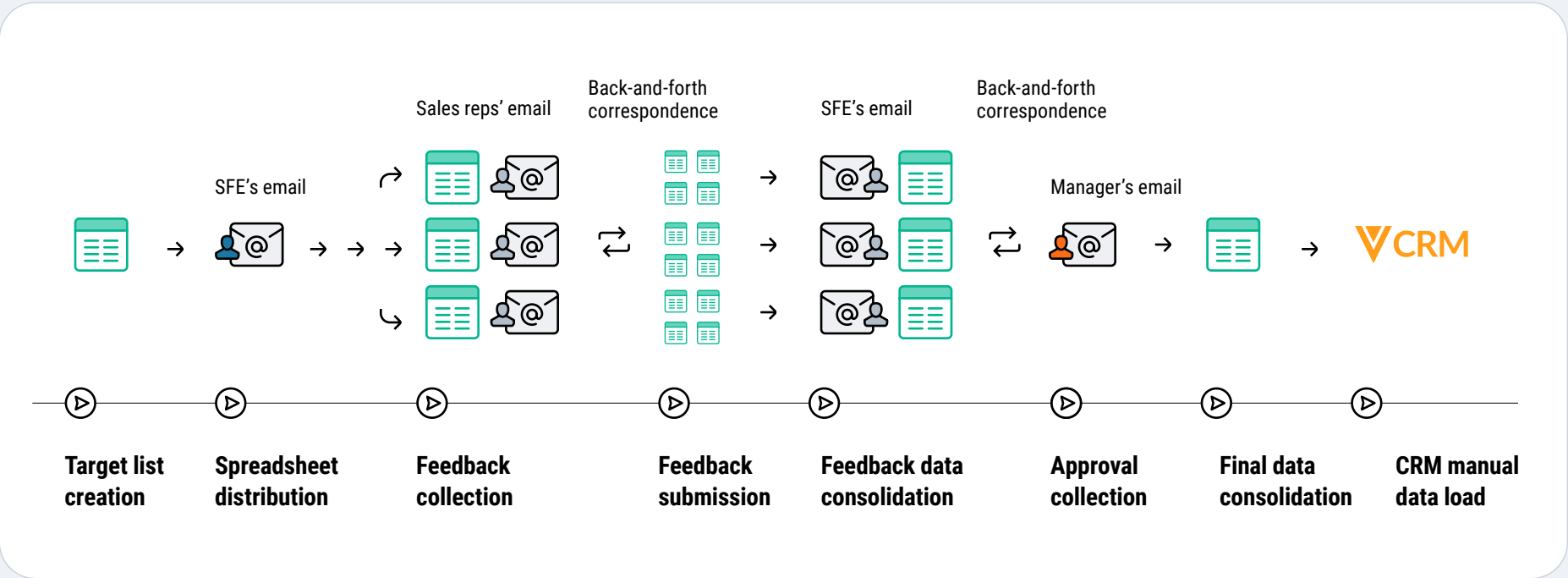
Biopharma companies invest considerable time and effort preparing plans for upcoming sales cycles. Integrated Territory Feedback allows field teams to add their knowledge to the targeting plan before the beginning of the sales cycle to prevent alignment discrepancies (e.g., having retired healthcare professionals in the target list).

# A Powerful Target Planning Process with Integrated Territory Feedback

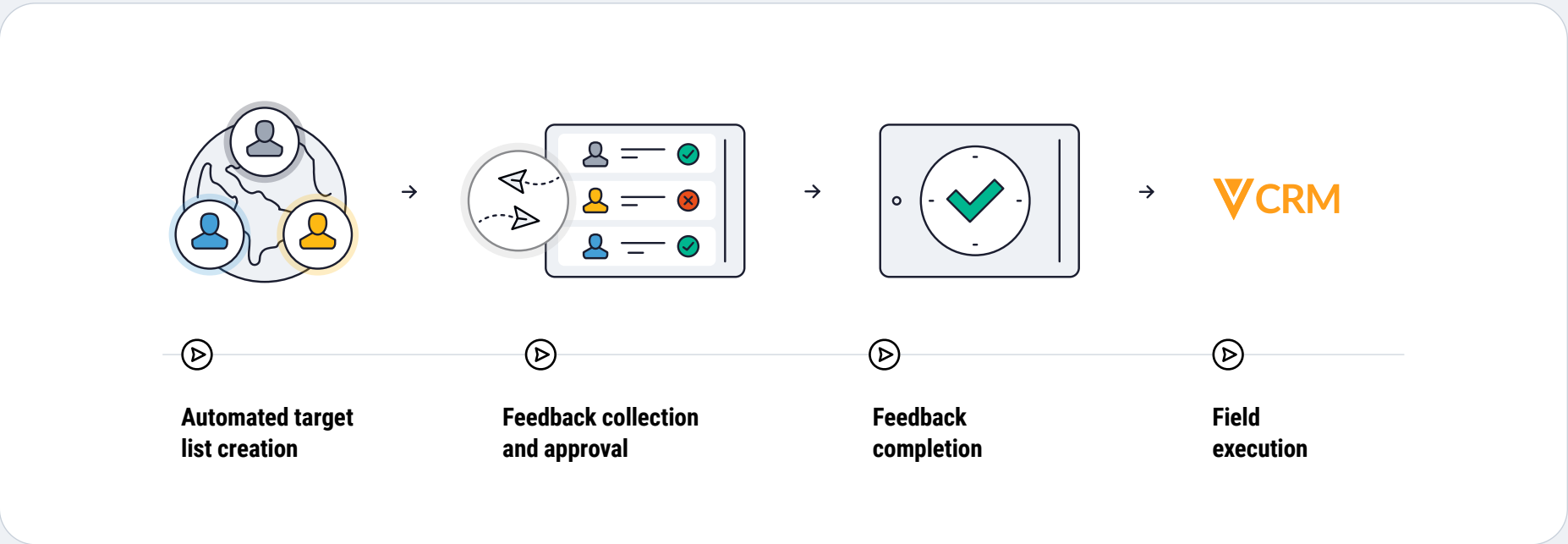
By incorporating reps insights on HCPs into the field plan, biopharmas can:

- Accelerate sales alignment:** A data-driven and automated field planning process speeds sales alignment up to 65%.
- Ensure plan accuracy:** HCP insights keep the plan current and relevant to market needs.
- Increase reps' buy-in and trust:** When reps' experience and knowledge are valued, they are more likely to endorse the plan.

## Target planning with spreadsheets



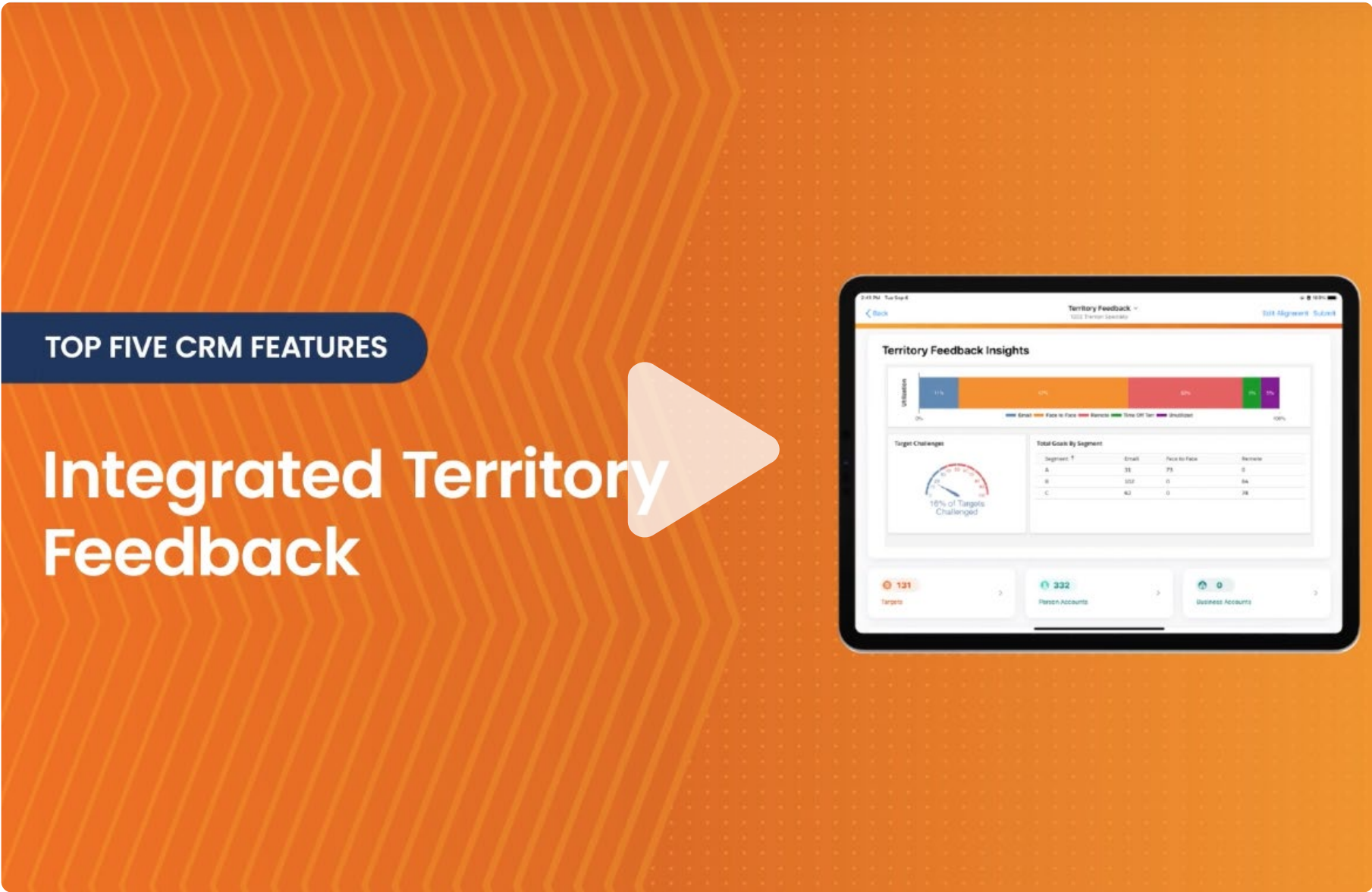
## Target planning with Align's Integrated Territory Feedback



# Integrated Territory Feedback in Action

Integrated Territory Feedback makes targeting plans more granular in just a few clicks, all in one app. It is included in Align and natively integrated with CRM.

All configurations set up in Veeva CRM will seamlessly transition into Vault CRM.



Click on the image to watch the Integrated Territory Feedback demo.

# The Balance Between Global vs. Local Needs

Harmonized targeting plans globally help streamline operations but cannot properly address the specific requirements of individual markets. Conversely, local plans ensure a tailored approach, but managing numerous variations can become cumbersome.

Integrated Territory Feedback helps you tailor the level of harmonization your company needs to support its business goals. Here are some possibilities:

- | Harmonizing markets globally
- | Harmonizing markets globally while allowing local flexibility
- | Empowering local markets while maintaining global harmonization
- | Empowering local markets

## Global vs. Local Needs



## 1. Harmonizing markets globally

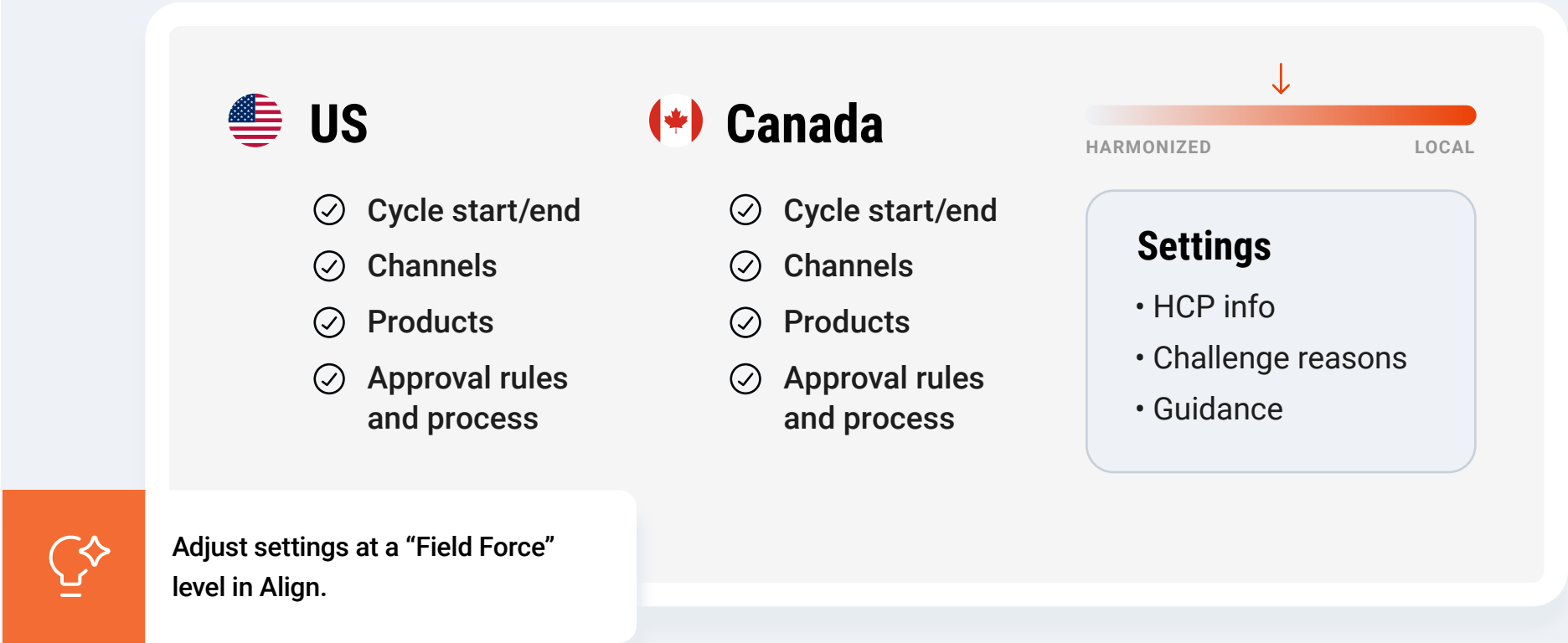
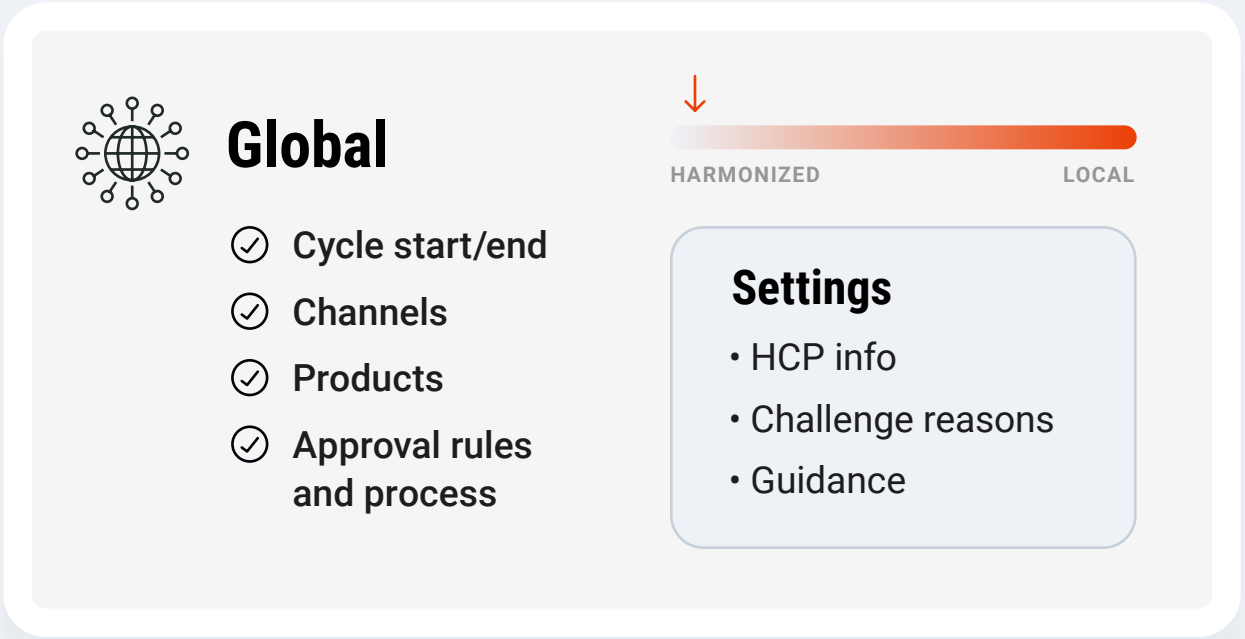
All reps have the same experience. They see the same fields displayed, metrics, and product mix. They also follow the same approval process (e.g., requiring district manager approval).



## 2. Harmonizing markets globally while allowing local flexibility

In a balanced approach, a shared set of settings is used so companies retain the fields and columns displayed to reps and the metrics they see.

This approach gives local markets (e.g., US and Canada) flexibility to manage their cycle dates, products, channels, and approval processes.



### 3. Empowering local markets while maintaining global harmonization

Organizations can have field-force-specific settings instead of global ones for a more granular approach.




### 4. Empowering local markets

Biopharmas that want to tailor their targeting plans to local needs can use independent country and field force set-up.

This approach gives local markets (e.g., US and Canada) flexibility to manage their cycle dates, products, channels, and approval processes.



 **US**

HARMONIZED

LOCAL

✓ Cycle start/end

✓ Channels

✓ Products

✓ Approval rules and process

Settings

• HCP info

• Challenge reasons

• Guidance

 **Canada**

HARMONIZED

LOCAL

✓ Cycle start/end

✓ Channels

✓ Products

✓ Approval rules and process

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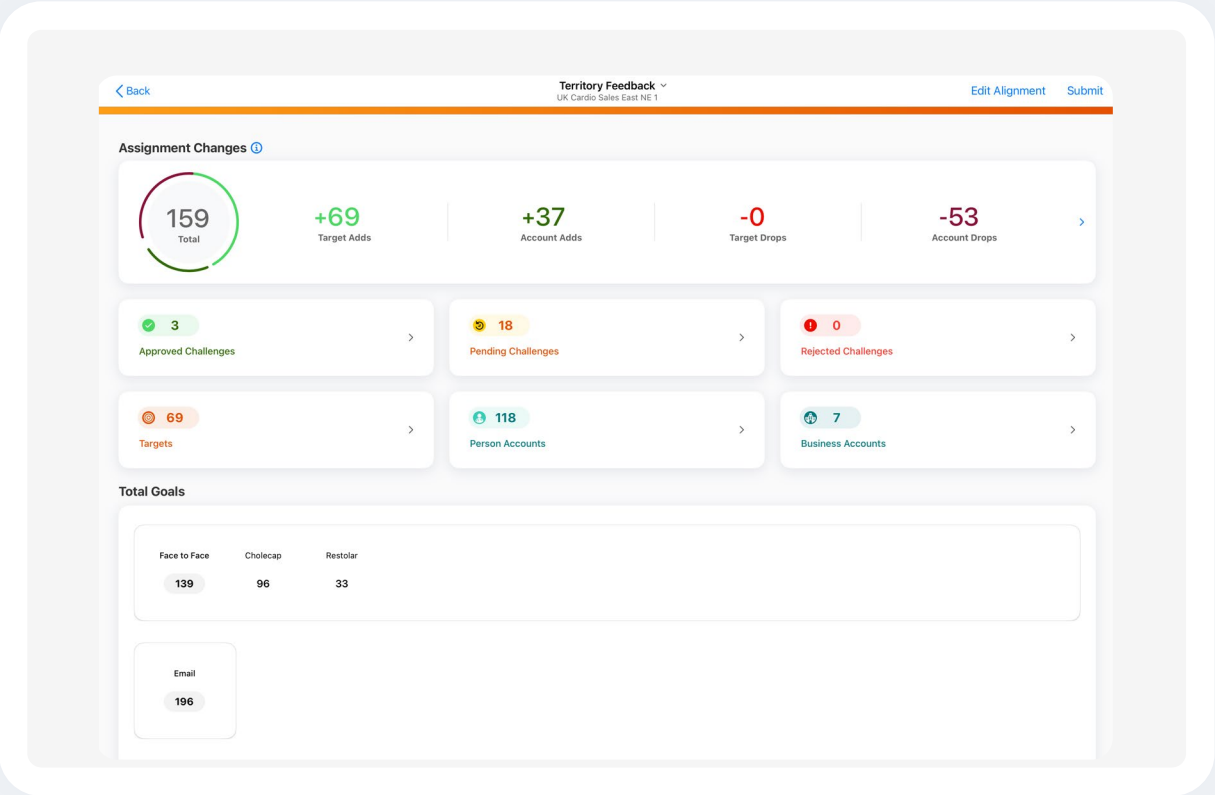
# Guardrails to Get the Right Feedback

The Integrated Territory Feedback dashboard displays standard widgets to help users understand whether they adhere to the organization’s guidelines.

Examples of common needs:

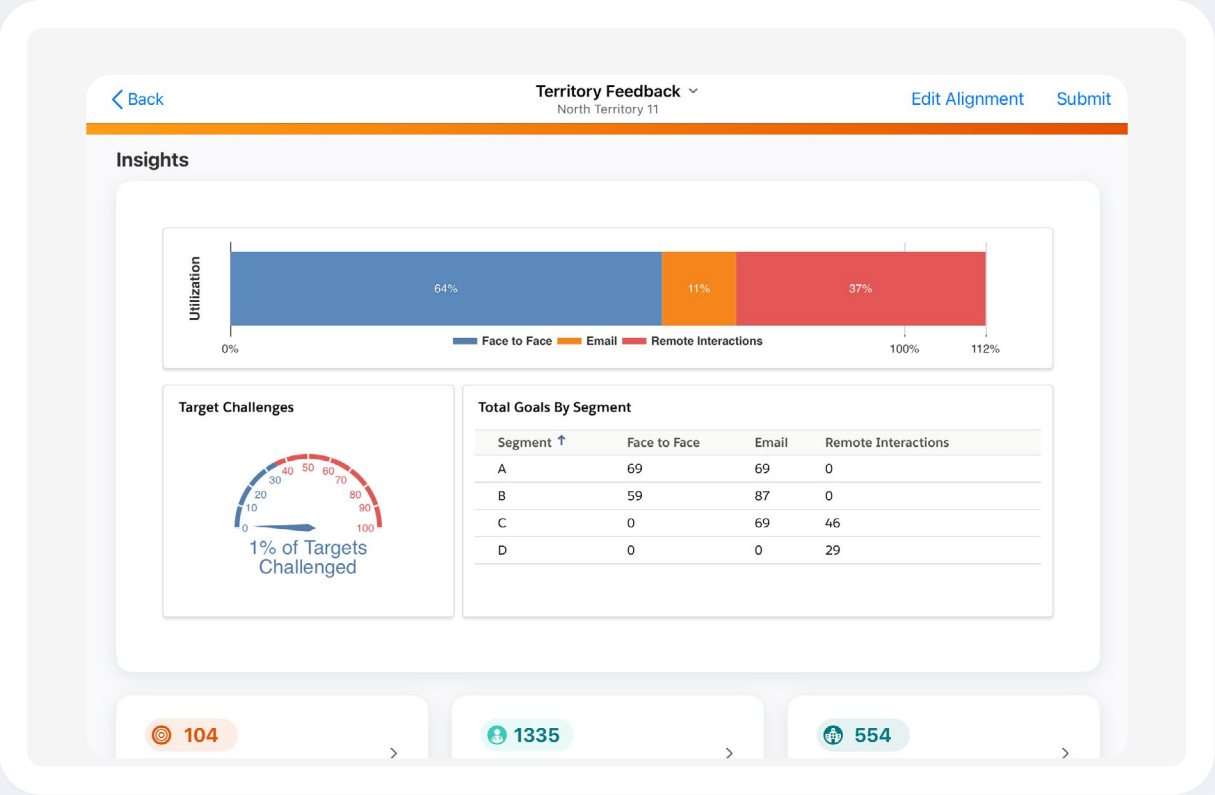
- “Have between 150 and 170 targets.”
- “Do not have more than 2,000 HCPs assigned.”
- “Have at least 100 face-to-face interactions for Cholecap.”

- MyInsights** can be embedded within the feedback dashboard for more bespoke needs and help adhere to complex guidelines, for example:
- “Have at least 750 segment-A cardiologists assigned.”
  - “60% of targets must be Cholecap segment-A with a face-to-face goal of between five and eight.”



## Reps’ Insight

They are meeting the interaction goal but need to catch up on the target goal



## Reps and Managers’ Insights

- ✓ The utilization bar and a gauge chart are showing the proportion of challenged targets
- ✓ The breakdown of the total number of interactions by each of their segments of HCPs

Example of a custom MyInsights visualization embedded into the Feedback dashboard.



# Rejecting and approving challenges automatically

Align’s automated approval and rejection rules ensure quality and speed in the feedback process. They save managers time by reducing the feedback they need to review.



Managers can set up the rule “Reject challenge to remove a target if Cholecap segment = A” to eliminate the need for manual checks and ensure segment-A targets are never mistakenly removed.

## Model Feedback Approval Rule: Reject Remove Target if Segment A

Cancel Save

### Details

Name\* Reject Remove Target if Segment A

Challenge Type\* Remove Target

Approval Rule Type\* Reject

Field Force Model\* Canada Sales Field Force

### Rule Criteria

	Object	Field	Operator	Value
1	Product Metric	Product	equals	Cholecap
2	Product Metric	Segment	equals	A
+ Add Criteria				
Field Logic Filter		(1 AND 2)		


### Message

Segment A accounts must be targets.

# Features That Reduce Preparation Time

Biopharma companies can leverage the current sales cycle as a starting point for the following sales cycle preparation, saving time through one of the following options available in Align:

- Import into model:** model settings, approval process, and auto-approve/reject rules can persist from cycle to cycle.
- Cycle cloning:** includes cycle details, channels, products, and targeting rules.
- Feedback cloning:** enables feedback to persist from cycle to cycle so that reps don't need to re-enter it.




Visit the [dedicated help page](#) for detailed “how to” steps to reduce preparation time.

# Veeva Best Practices to Implement Change

Here are Veeva’s top tips to achieve successful adoption after enabling Integrated Territory Feedback:

- Focus on value:** Explain to your stakeholders what Integrated Territory Feedback offers, including increased productivity, fewer administrative workloads, and reduced time off from territory.
- Gain senior leader buy-in:** Identify leaders who could act as ambassadors to promote the feature internally.
- Start small:** Understand and test the process with one field team, then roll it out broadly. Start with a medium-sized commercial field force and work closely with the country sales force effectiveness lead to identify core business requirements.
- Get the timing right:** The enablement of Integrated Territory Feedback needs to be tied up to the beginning of the following sales cycle to ensure that field teams have enough time for training.



Start the training just before the feedback windows so reps can first experience Integrated Territory Feedback while the training is still fresh.

# Top Benefits of Integrated Territory Feedback

## Reps can:

- Provide the correct feedback with speed
- Navigate an intuitive UX within the CRM iPad app
- Adhere to business guidelines with ease

## Managers can:

- Review and approve challenges quickly
- Navigate an intuitive UX within CRM in the browser
- Save time with automated approval rules

## Operations can:



- Have configurable approval processes
- Gain flexibility to meet business units' differing needs
- Prepare for the sales cycle quicker

## Commercial Excellence can:


- Maximize Align's usage with no additional costs
- Foster a gradual adoption
- Ensure compliance with business guidelines

# Keep Learning

## CASE STUDIES

-  [CSL Behring Decreases Field Planning Time by Up to 50%](#)
-  [GSK Speeds Sales Alignments by 65% with Productive Feedback](#)



## BLOG

-  [Five Must-Have CRM Suite Capabilities for Instant Productivity Boosts](#)


## EBOOK

-  [Agile Field Force Planning: Three Steps to Create Better HCP Engagement](#)

## HELP

-  [Territory Feedback Standard Process](#)
-  [Integrated Territory Feedback](#)

Get expert guidance on how to start using [Integrated Territory Feedback](#).



## ABOUT US

Veeva is the global leader in cloud software for the life sciences industry. Committed to innovation, product excellence, and customer success, Veeva serves more than 1,100 customers, ranging from the world’s largest biopharma companies to emerging biotechs. As a Public Benefit Corporation, Veeva is committed to balancing the interests of all stakeholders, including customers, employees, shareholders, and the industries it serves.

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