Veeva Vault CRM

Veeva AI for Vault CRM:
Drive Commercial Efficiency
and Effectiveness

Overview

> " *With Vault CRM, we are on the fast track to personalized, AI-powered customer engagement in 2025 and a clear path for future innovation."*
>
> — **Ozlem Arisoy**
> Head of Commercial Digital and Information Technology, Bayer

> " *By embedding AI into every step of the customer journey — from how practitioners receive valuable information about our portfolio to how they engage with our field force — Veeva is ideally positioned to support us in our mission to deliver life-changing medicines to patients worldwide."*
>
> — **Greg Meyers**
> Executive Vice President, Chief Digital and Technology Officer, Bristol Myers Squibb

> " *We are excited to expand our long-standing partnership with Veeva by moving to Vault CRM. We share a deep commitment to advancing medicine and are excited to explore the potential of Veeva AI to help drive commercial execution to the next level."*
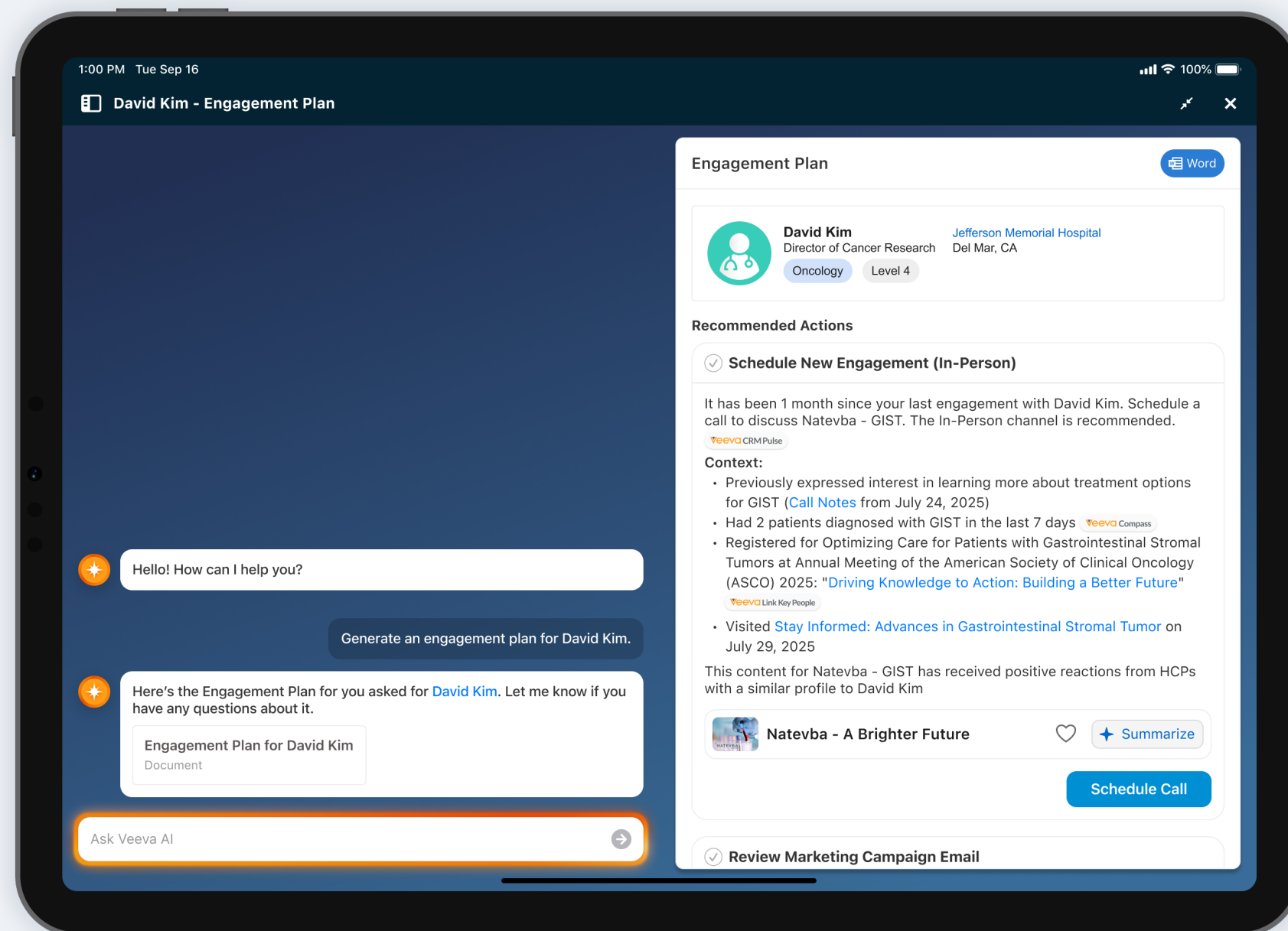>
> — **Anna Åsberg**
> Global CIO, Gilead Sciences

GenAI is a new computing paradigm — with a technological impact comparable to the launch of the internet or cloud computing. **Veeva AI** is agentic AI for the life sciences industry and uses these new, transformational capabilities to significantly increase industry productivity. With Veeva AI, agents are built into the core of the Vault platform, on the same level as the foundational components of data and content. Because of this unique architecture, these agents have direct, secure access to data and content.

Veeva AI agents are highly specialized for the specific use cases of the life sciences industry and run in Veeva's deep, industry-specific applications — providing them the deep application and use-case context to be highly effective. And just like other core capabilities of the Vault platform, customers can configure and extend Veeva-delivered AI agents and build custom AI agents to address company-specific needs.

Pre-call Agent, **Voice Agent**, **Free Text Agent**, and **Content Agent** are the first AI Agents in Vault CRM, available in December 2025.

David Kim - Engagement Plan

Engagement Plan Word

David Kim
Director of Cancer Research
Oncology Level 4

Jefferson Memorial Hospital
Del Mar, CA

Recommended Actions

✓ **Schedule New Engagement (In-Person)**

It has been 1 month since your last engagement with David Kim. Schedule a call to discuss Natevba - GIST. The In-Person channel is recommended.
Veeva CRM Pulse

Context:
- Previously expressed interest in learning more about treatment options for GIST (Call Notes from July 24, 2025)
- Had 2 patients diagnosed with GIST in the last 7 days Veeva Compass
- Registered for Optimizing Care for Patients with Gastrointestinal Stromal Tumors at Annual Meeting of the American Society of Clinical Oncology (ASCO) 2025: "Driving Knowledge to Action: Building a Better Future"
Veeva Link Key People
- Visited Stay Informed: Advances in Gastrointestinal Stromal Tumor on July 29, 2025

This content for Natevba - GIST has received positive reactions from HCPs with a similar profile to David Kim

Natevba - A Brighter Future ♡ + Summarize

Schedule Call

✓ **Review Marketing Campaign Email**

Hello! How can I help you?

Generate an engagement plan for David Kim.

Here's the Engagement Plan for you asked for David Kim. Let me know if you have any questions about it.

Engagement Plan for David Kim
Document

Ask Veeva AI

Veeva AI, directly in users' workflows

The first of hundreds of AI agents planned for the Vault Platform

ꓦ Vault CRM

Fastest path to AI
Agentic AI that drives significant productivity

✦ **Pre-call Agent**

✦ **Voice Agent**

✦ **Free Text Agent**

✦ **Content Agent**

Pre-call Agent

Pre-call Agent in Vault CRM is pervasive and context-aware, providing individualized customer context, opportunities, and suggested actions to:

▮ Maximize customer engagement opportunities

▮ Minimize preparation and data entry

▮ Proactively inform account planning and execution

The engagement plan this agent delivers contains a rich summary and an overview of suggested actions, plus the 'why' behind them, using signals from multiple sources including CRM call notes, external data on patient diagnoses, and information about event attendance.
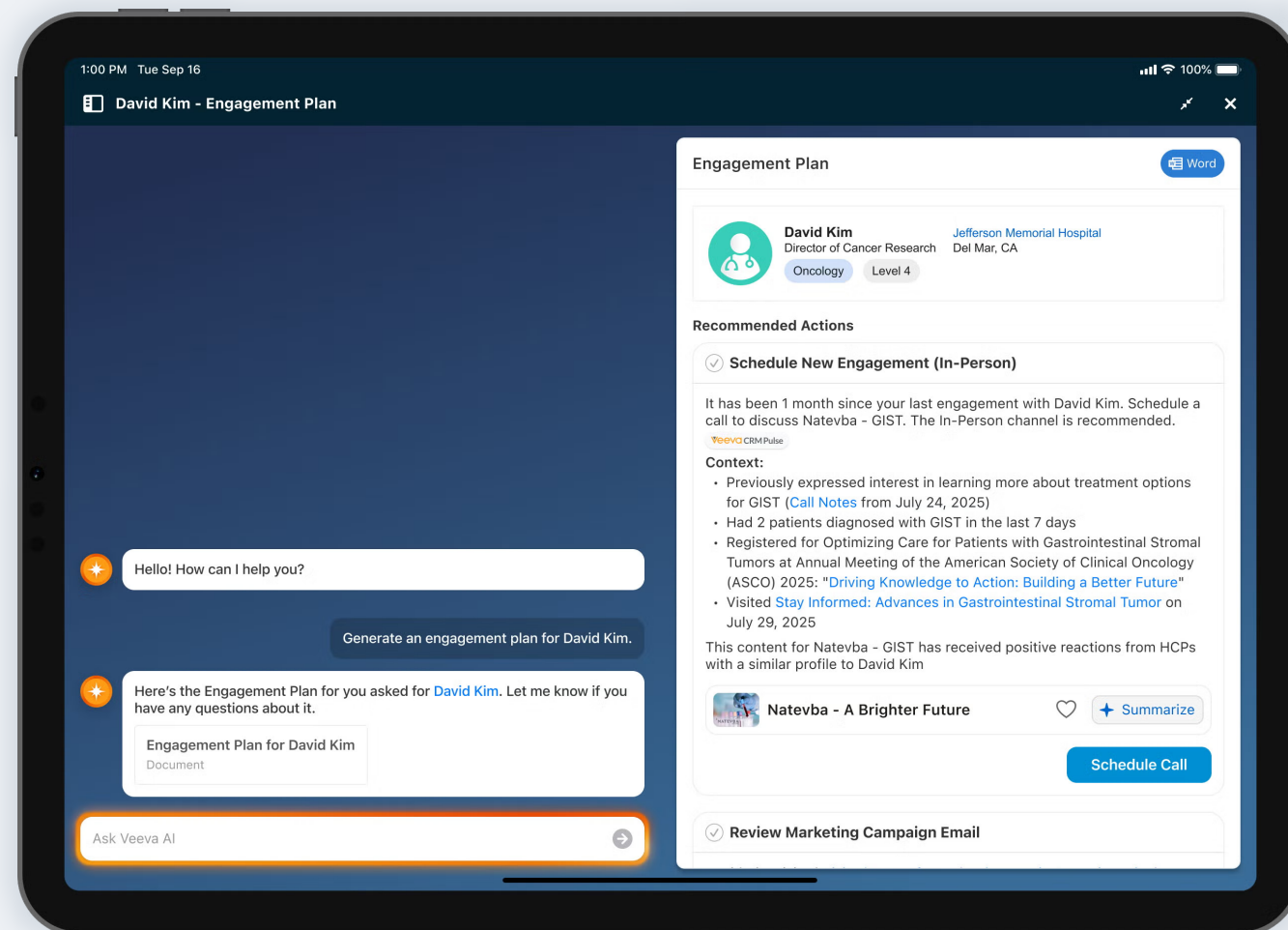
This and other images are conceptual UI designs subject to change.

USE CASE

Better engagement planning: Intelligence and next-best actions tailored to individual HCPs are delivered proactively to inform account planning or execution.

See Demo

Voice Agent

Voice Agent transforms the CRM experience by allowing users to leverage voice as the new user interface for CRM, saving time and effort when entering information into CRM. This agent helps field teams capture and act quickly on valuable insights.

With Voice Agent's ability to capture rich information seamlessly, stakeholders across sales, marketing, and medical rapidly know what was discussed and can better plan for their next touchpoints. For example, through a voice-captured call report, this agent:

▌ Records call details and key messages

▌ Can set team tasks and other actions

USE CASES

Capture information through natural language: Voice-to-data entry records, transcribes, and transposes voice notes in real-time.

Hands-free CRM: Navigate Vault CRM with your voice.

See Demo ↗
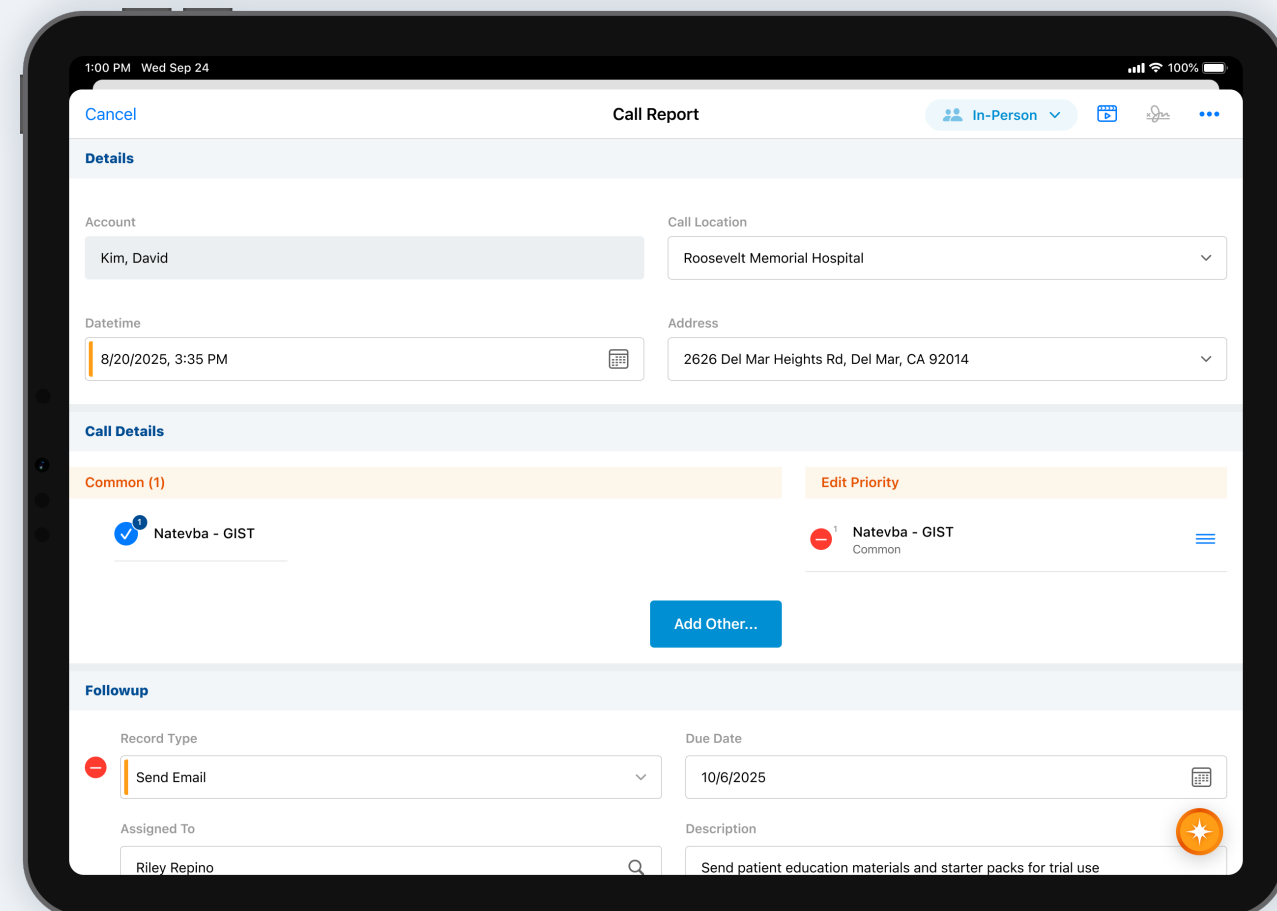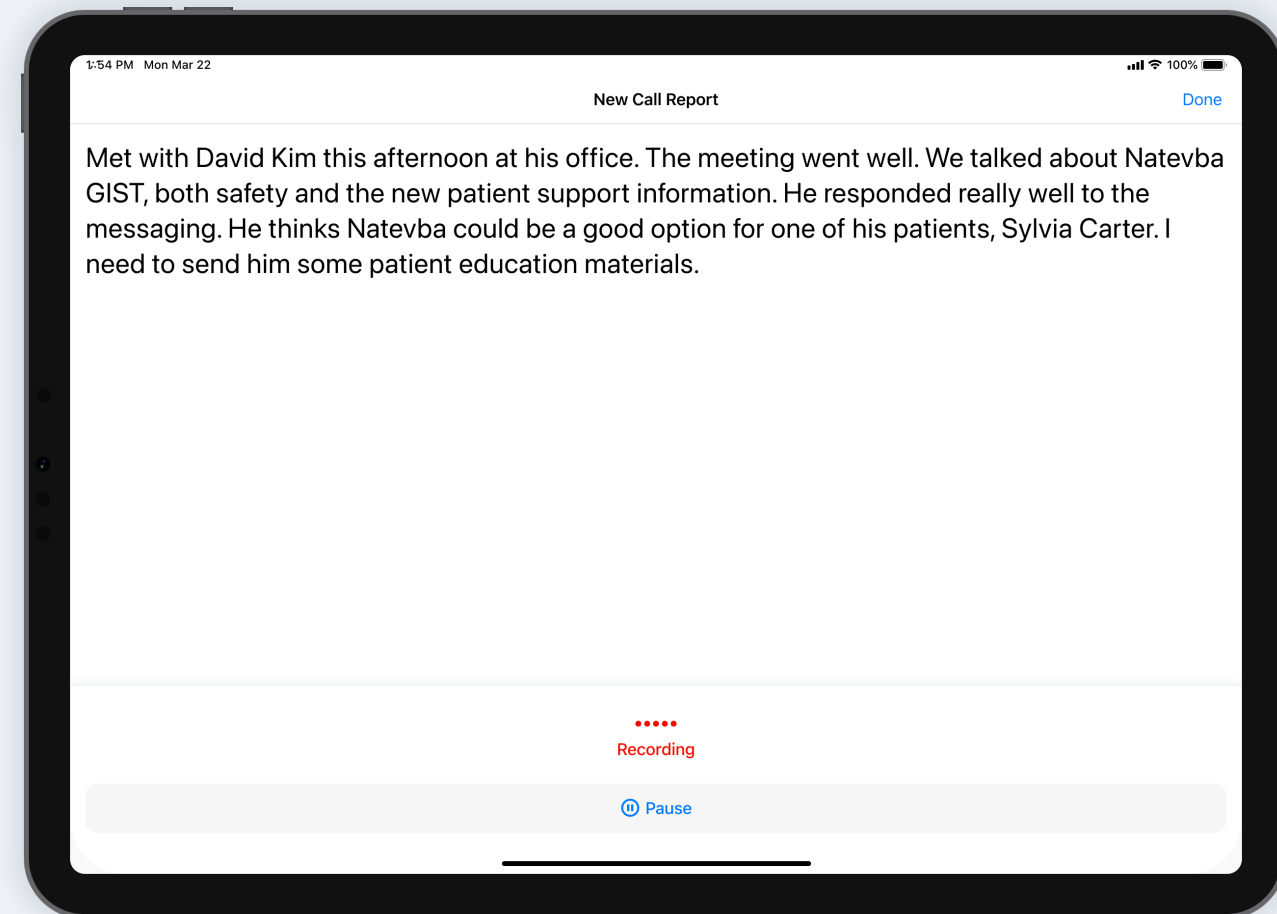
Free Text Agent

To ensure regulatory compliance, life sciences companies often limit or restrict reps from capturing free-form notes from HCP interactions. The ability to record free text notes provides tremendous opportunity for customer and account coordination, but allowing it without oversight can introduce risk. Free Text Agent unlocks free text for the life sciences industry, allowing these rich insights to be captured compliantly. As field teams enter voice or typed notes, it auto-checks for compliance in real time and flags statements or phrases that require review.

Free Text Agent:

▌ Uses a company's specific compliance policies, phrases, and keywords

▌ Ensures human intervention for any compliance issues it detects

▌ Can be configured to save history of compliance checks based on company policy

USE CASE

Real-time compliance checks

AI checks text- and voice-entered free text for compliance, flagging potential problems to effectively mitigate risk.
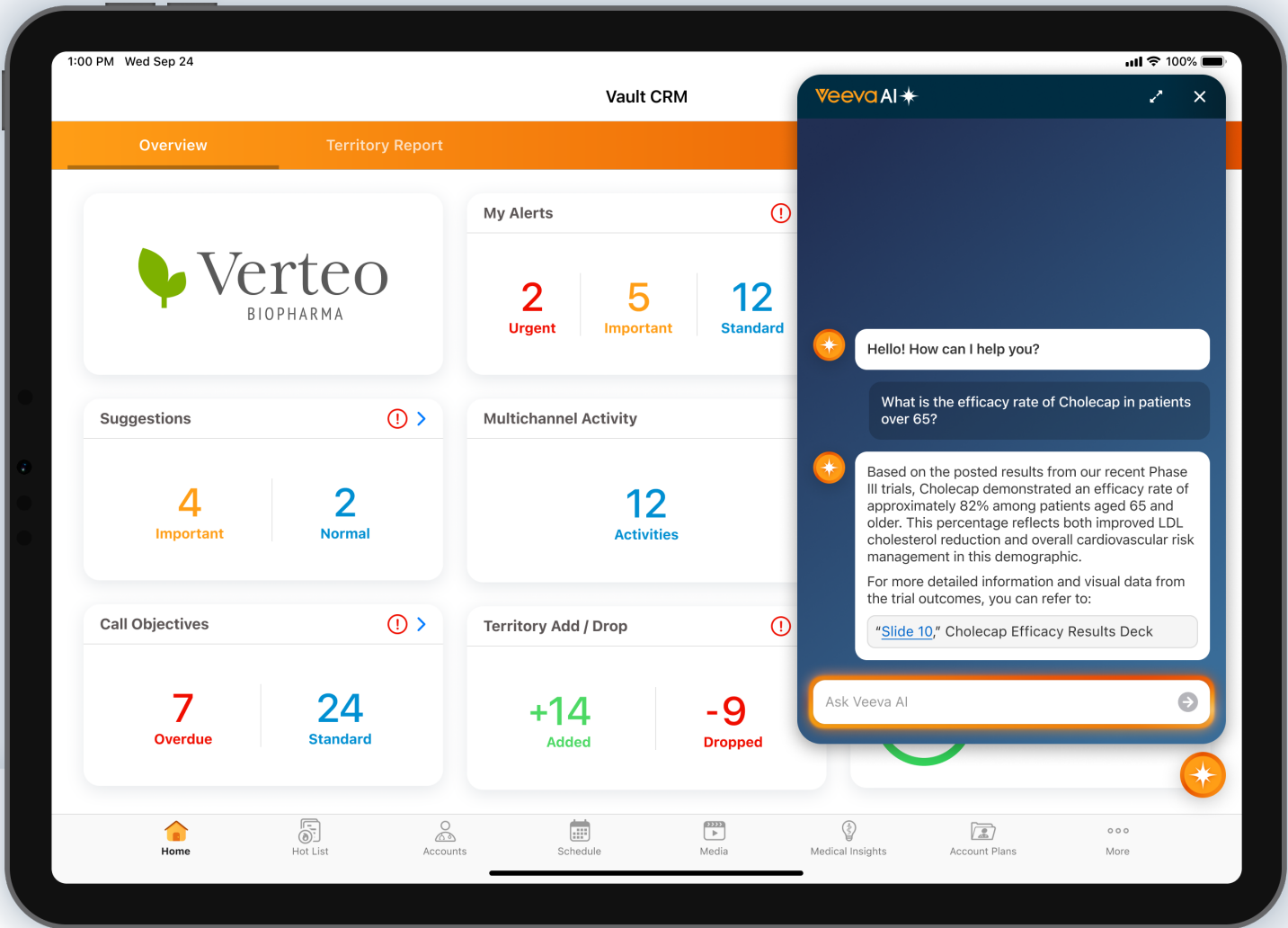
See Demo

Content Agent

The most impactful customer interactions use relevant, personalized content to relay complex science to HCPs. Field teams that can access this information quickly will use it more often to tell a treatment's success story.

Content Agent:

- Uses semantic search within any content library
- Locates, summarizes, and launches content instantly

USE CASE

Semantic content search: Find and surface relevant content intelligently, simplifying the search for approved, compliant materials.

See Demo ↗

Life sciences specific Agentic AI is in Vault CRM. Achieve coordinated customer engagement and increased commercial productivity with Veeva AI in Vault CRM.

See a demo of Veeva AI for Vault CRM. ↗

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.

For more information, visit www.veeva.com

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