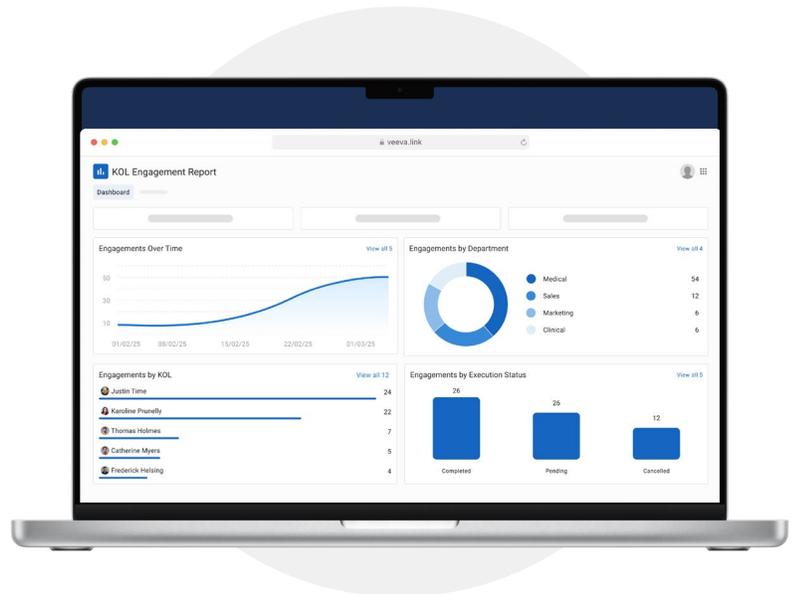


# Plan and track KOL engagements with precision

Effective engagement with high-priority KOLs requires a unified strategy. However, coordination is often hindered by information silos and “invisible” interactions from non-field teams. Without a shared view, opportunities are missed and organizations risk delivering a disjointed experience—either overwhelming or neglecting key experts.

Link Workflow bridges these gaps by providing a centralized workspace for cross-functional engagement planning. Built on Link Key People, it ensures every plan is powered by deep, real-time KOL data.

Designed for clinical, medical, sales, and marketing teams, Link Workflow enables the transparency and alignment required to deliver seamless and impactful KOL experiences.



## Business Benefits

### Collaborate on priority KOLs

Set shared objectives aligned with your strategic priorities and avoid over- or under-engagement of key experts. Manage cross-border engagements.

### Track cross-functional engagements

Drive transparency of engagements across teams, functions, and geographies to ensure a unified approach.

### Unlock engagement metrics

Monitor execution in real time and get a comprehensive view of KOL utilization across the enterprise.

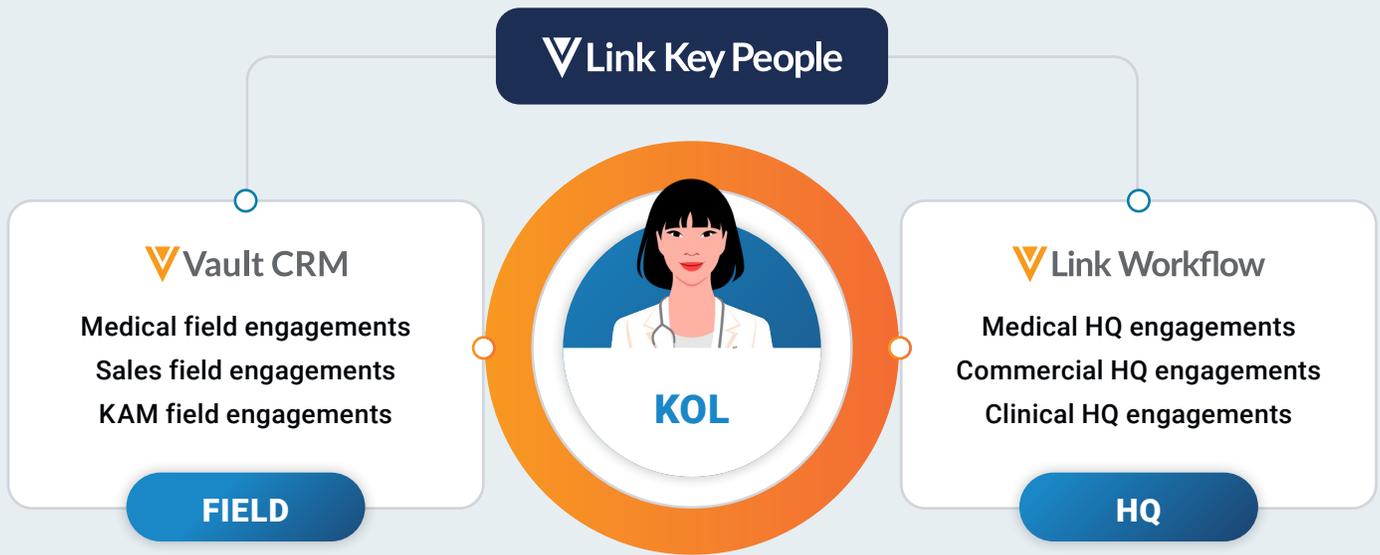
## KOL ENGAGEMENT PLANNING

KOL identification and prioritization

Engagement planning and tracking

Cross-country requests and approvals

Reporting and progress assessment



*Link Workflow allows non-field teams to easily capture engagements, so you can get a complete view of interactions with a given KOL that are surfaced in Link Key People.*

## Features

- ✔
**Strategic planning**  
 Set specific, purpose-driven objectives for your top experts. This feature allows you to identify relationship owners and uncover collaboration opportunities across all functions, ensuring a coordinated approach to your strategic priorities.
- ✔
**Unified KOL view**  
 Break down data silos by creating cross-functional visibility into non-field engagements. All interactions are then surfaced in Link Key People alongside CRM data, providing a complete view of the KOL's experience with your organization.
- ✔
**One-click HQ tracking**  
 Make it easy for non-field users to record interactions with an easy "one-click" capture system directly from the KOL's profile. This ensures that critical HQ engagements from medical and commercial teams are never "invisible" again.
- ✔
**Real-time reporting**  
 Monitor your execution status against your plan with interactive dashboards. View engagement metrics across multiple brand teams and functions to identify and correct over- or under-engagement of KOLs.
- ✔
**Mobile engagement management**  
 Maintain productivity on the go with the Veeva Link mobile app. You can view, create, or update engagements and capture post-meeting notes directly from your mobile device to ensure timely follow-ups.
- ✔
**Collaborative task management**  
 Organize your tasks with a dedicated "My Tasks" view. Streamline your individual process by staying on top of all future meetings and action items.
- ✔
**Approval routing**  
 Drive transparency and alignment across functions and geographies by coordinating approvals with specific relationship owners. This ensures a consistent experience for every global KOL.