Understanding Veeva CLM

Non-Technical Product Overview
Updated 20R2

Veeva

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Terms to Know

CLM

- "Closed-loop-marketing"
- For Veeva, this refers to the *presentations* that a rep would use on a sales call.
- CLM is stored in the **Media** tab on the CRM app.

CRM App

- The actual Veeva interface on the rep's device, typically an iPad.
- This is where the rep records a sales call, accesses presentations, reports and other multichannel tools.

Multichannel Content

- For Veeva, this includes content found on the following products: CLM, Approved Email, Engage, and MyInsights.

Key Message

- Specific message(s) that are delivered for each product or detail topic selected in the detailing section (e.g., Safety, Dosing, etc.).

Call Report

- The report that pops up at the end of a sales call displaying the information reviewed and captured during the call.
- The rep is able to edit some objects on the call report before saving.

Reaction Buttons

- Feedback for media presented to HCPs can be captured while content is displayed utilizing the reaction buttons in the top left corner of the presentation.

Call Clickstream

- Clickstream is a Veeva object that allows actions and survey responses to be captured during a CLM presentation on Veeva CRM.

What is Veeva CLM?

- Veeva CLM is a closed-loop-marketing platform that helps your clients create richer face-to-face interactions and provides detailed feedback to their marketing and sales teams.

- Account data from CRM is seamlessly linked with presentations to deliver personalized content, boosting the impact of each customer engagement.

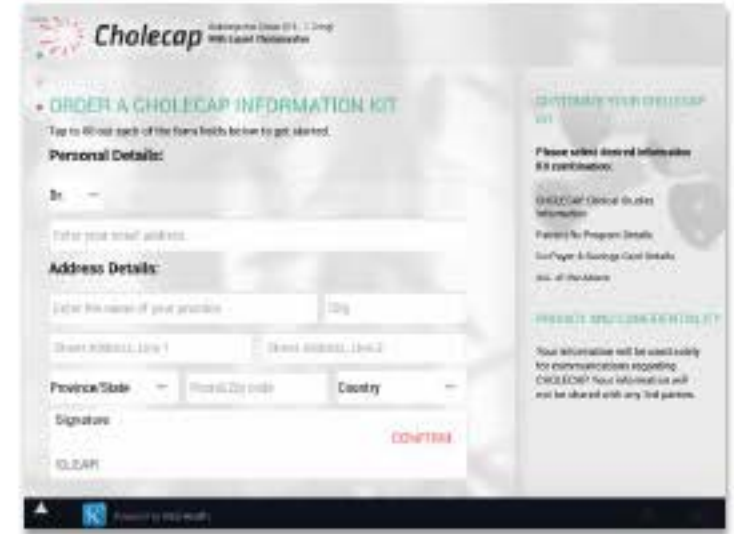- Veeva CLM presentations can work alone or in tandem with the other Veeva Multichannel commercial products.

CLM Use Cases

Detail Aid (IVA / Sales Detailer)

Video Library

Form / Data Capture

Other CLM Examples:

- Formulary Tool
- Patient Access Tool
- Consent / Opt-In Programs

- Patient Profile Builder
- 3D Display/Augmented Reality
- PowerPoint Presentations

Using Veeva CLM

Meet the Veeva CRM iPad App

- Veeva CRM is the platform that leverages Salesforce to deliver targeted and compliant messages to the right customer at the right time.

- The CRM app is specific for the life sciences industry and allows your clients to better coordinate and execute sales plans as well as providing key metrics and actionable insights to their team.

- The Veeva CRM app houses all of the multichannel products and is the cornerstone of delivering your content.
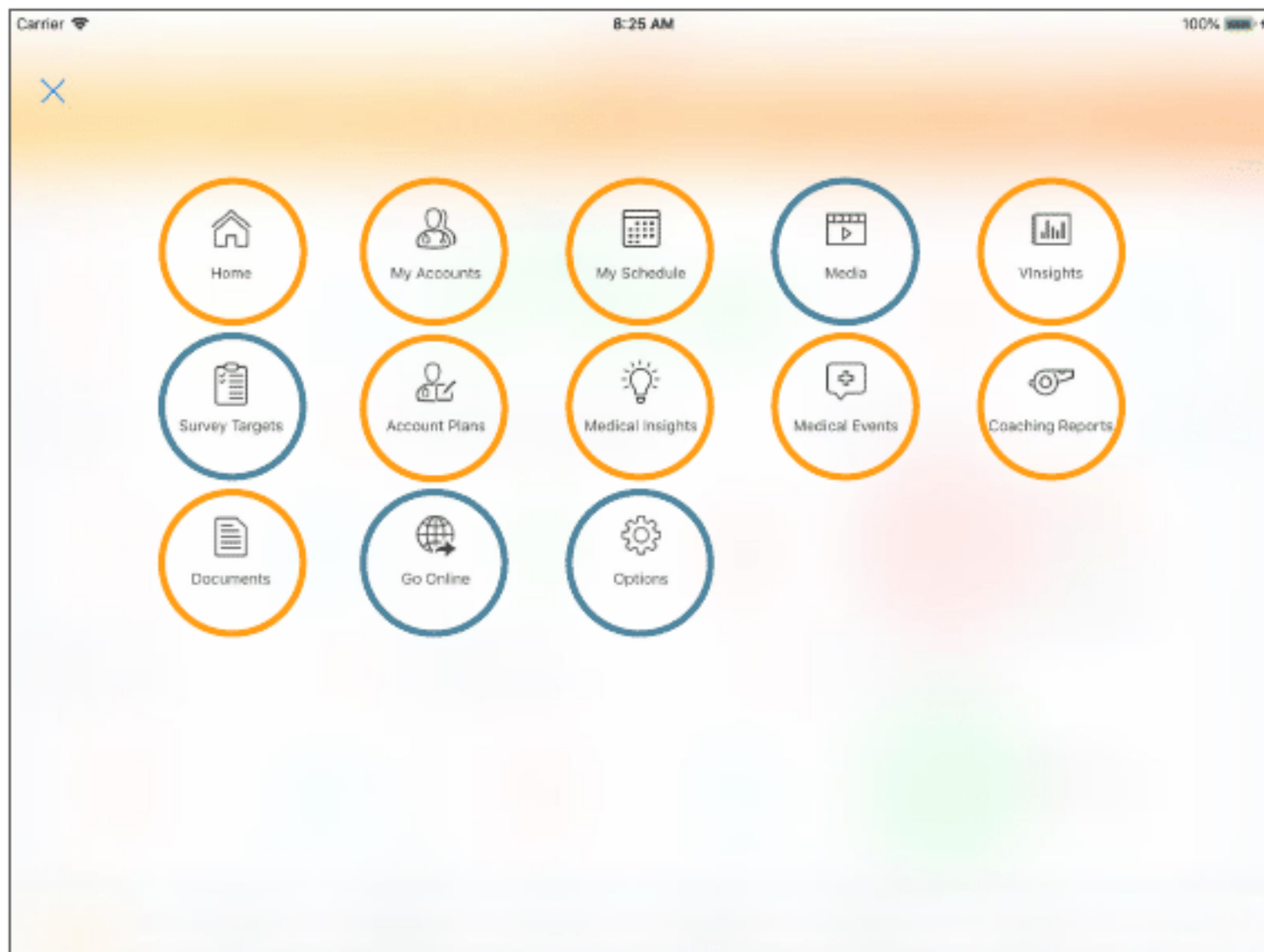
Accessing CLM Presentations

Menu

- Here the reps can navigate the different components of their CRM.

Multichannel Content

- Reps can access multichannel content most quickly from the Media tab.
  - Reps can also access the content from My Accounts and beginning a call from there.
- MyInsights tab allows reps to view customized, real-time data visualizations.
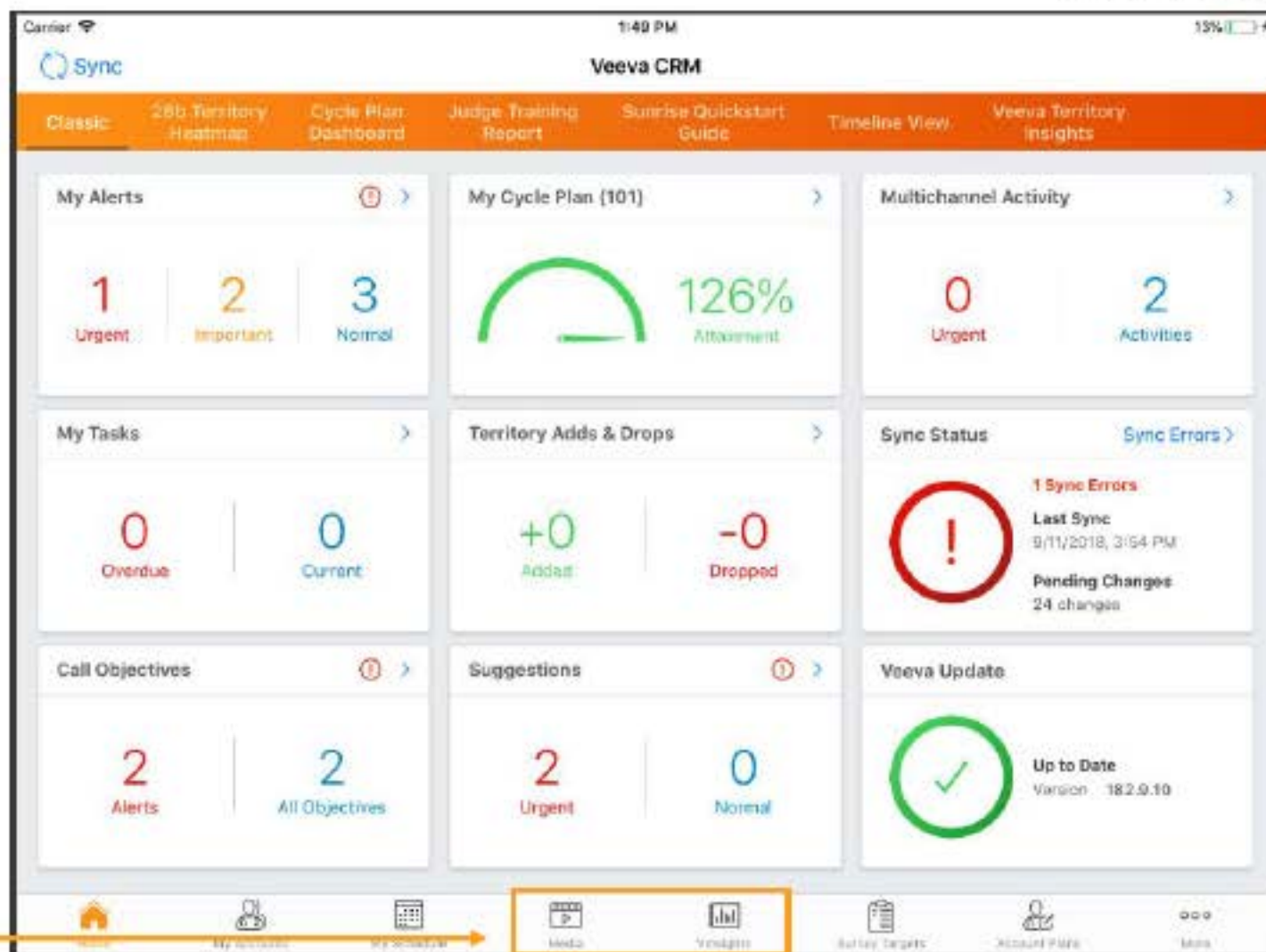
CRM More Screen

Accessing CLM Presentations

CLM Directory

- From here, you can view all of the approved, available CLM presentations.
  - If presentations are not grouped, then they are listed alphabetically.

- You can define attributes by which presentations can be grouped. Reps then have the ability to select the attribute by which to group their presentations, dependent on the grouping attributes defined by the administrators.
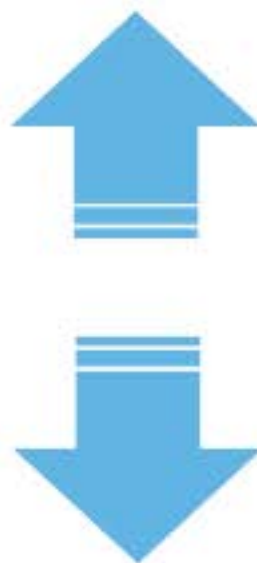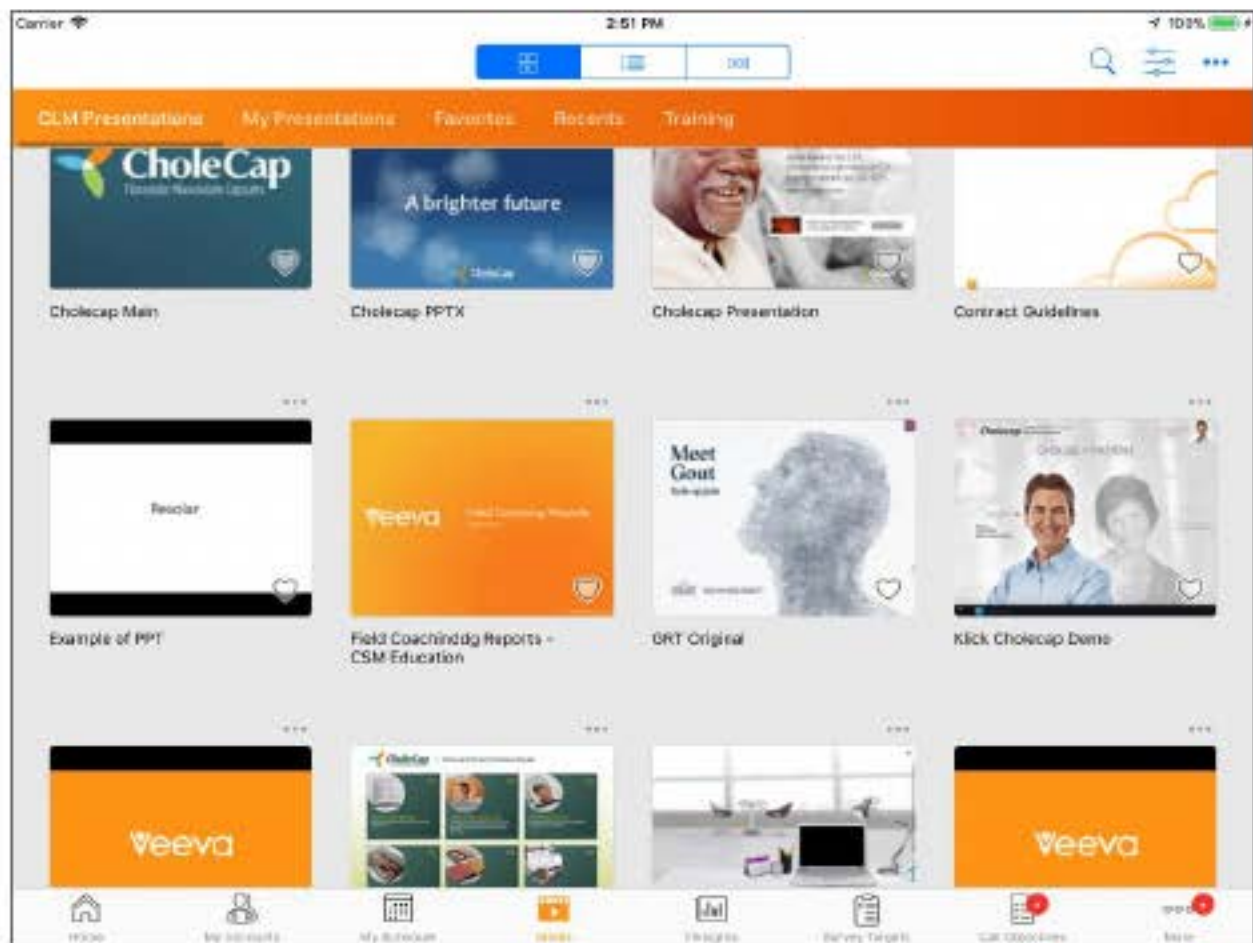
# Thumbnails & Selection of Favorites in Search

- Overview
  - Search results now include thumbnails and the ability to Favorite the presentation
  - The thumbnails should make it easier for reps to select the correct presentation

Thumbnail

Favorite Icon

Search Results in 18R3
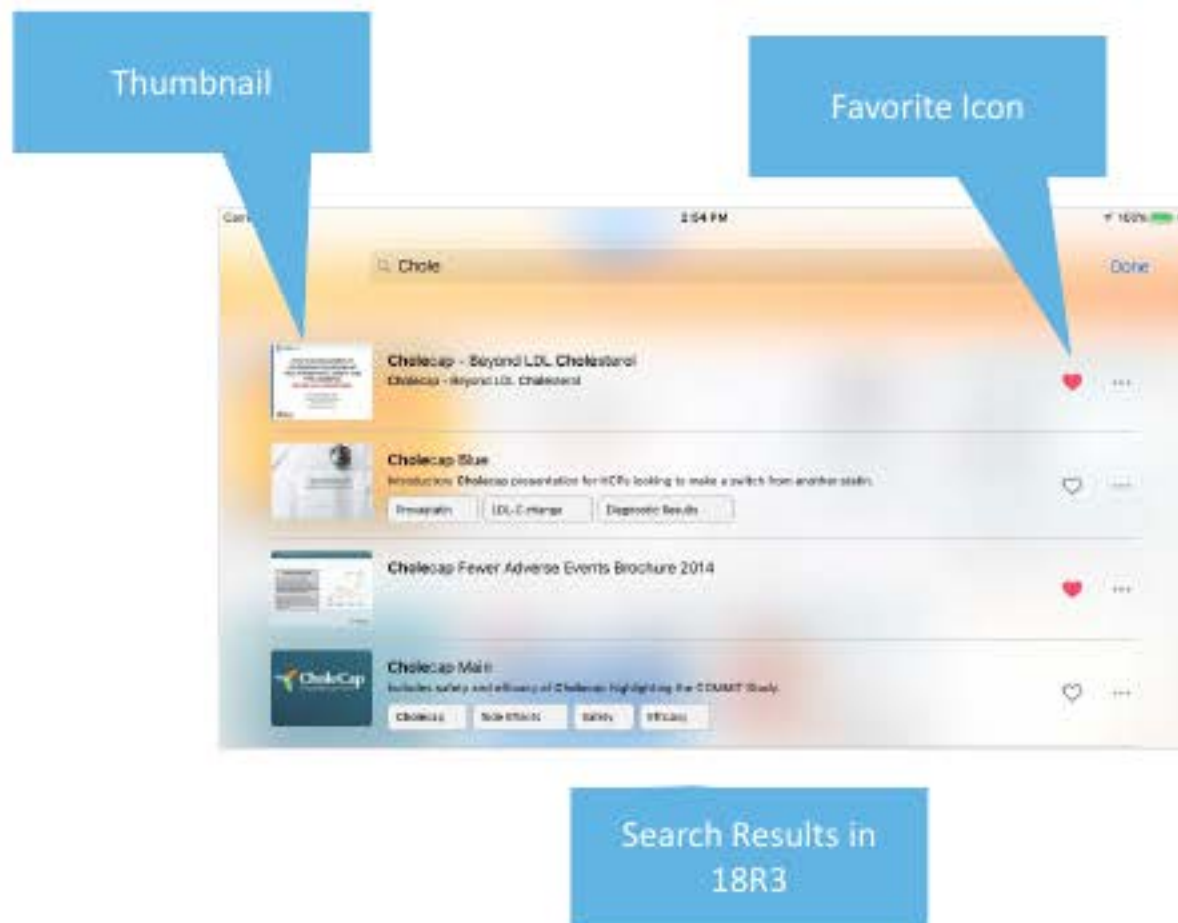
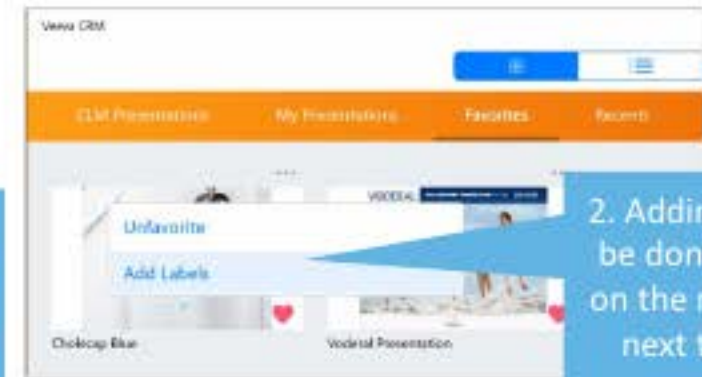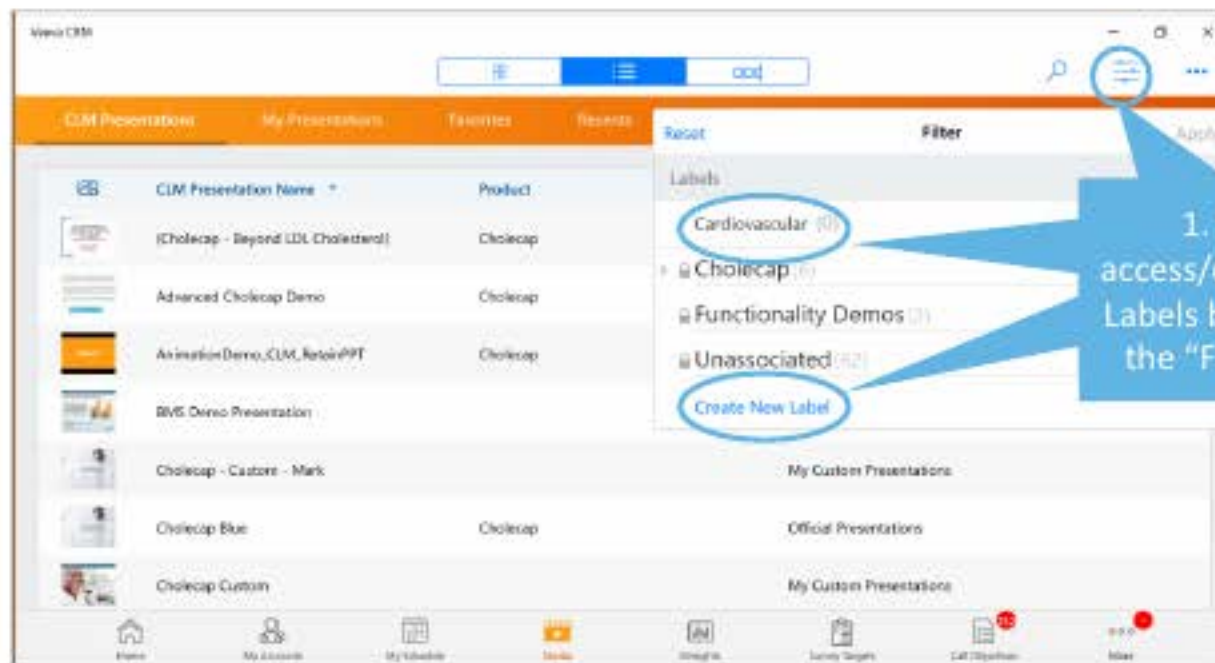# Display By View for Grouping Presentations

- Overview

  - In addition to viewing presentations by using the Tile view or Table view, users are now able to select from a list in the Display By view to group presentations

  - The default view is the first option in the Display By list. Once you select a new option, that option becomes sticky and automatically displays the next time you access the Display By view

Display By View

Display By list

Option Selector for grouping
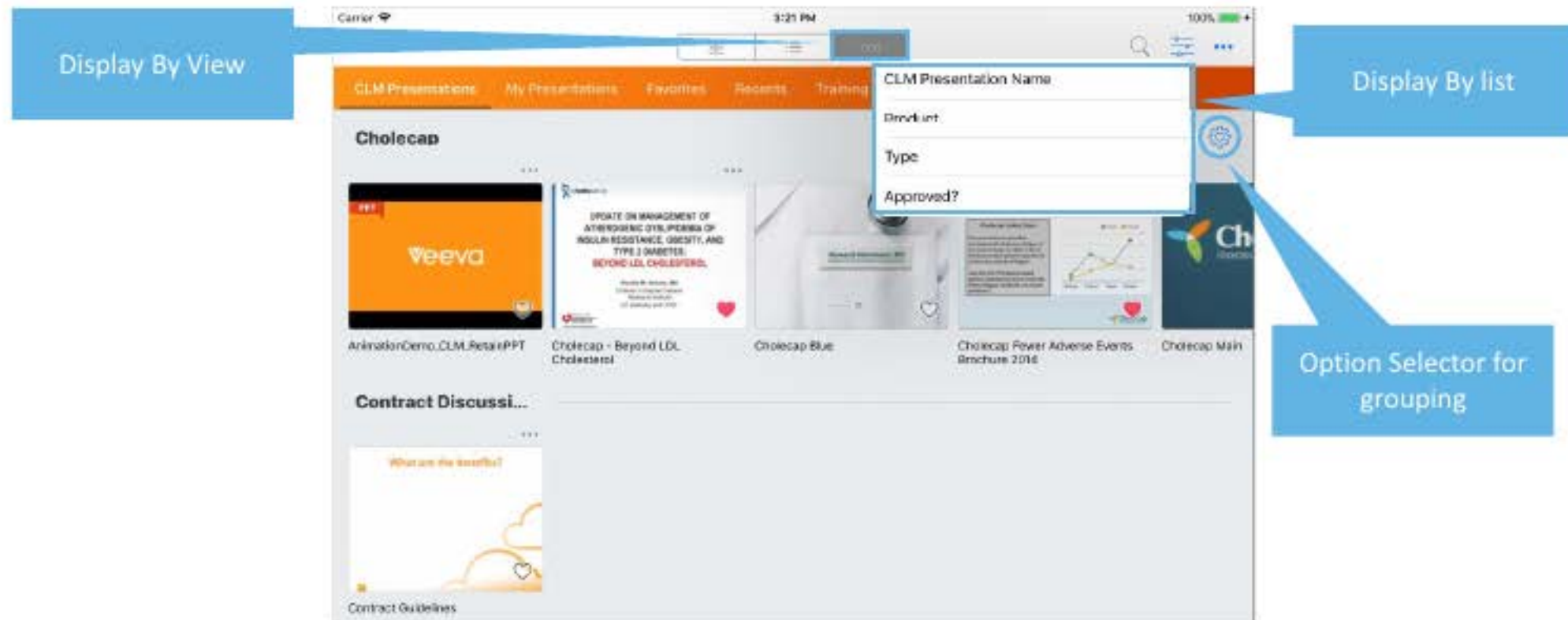
CLM Presentation Labels

- Overview
  - Users can create and add labels to CLM presentations to organize their presentations and find them more quickly in their Content Library
  - Custom labels are unique to individual users and are not shared between users
  - The user can create a custom label and apply the appropriate label to the corresponding presentations

1. You can access/create or edit Labels by clicking on the "Filter" menu

2. Adding Labels can be done by clicking on the menu button next to the CLM presentation

3. Several Labels can be assigned to one CLM Presentation

Navigating CLM

## Understanding Slides and the User Experience

Reaction buttons
160 x 37 pixels. Can be configured on/off per slide or on an organization-wide basis.

Navigation Bar
61 x 30 pixels. Can be configured on/off per slide. (Shown with slide drawer expanded).

The navigation bar can be accessed by tapping the arrow in the lower left corner. Within this bar, users can navigate to another slide within the presentation, or use the "Find Presentation" link to access a different presentation
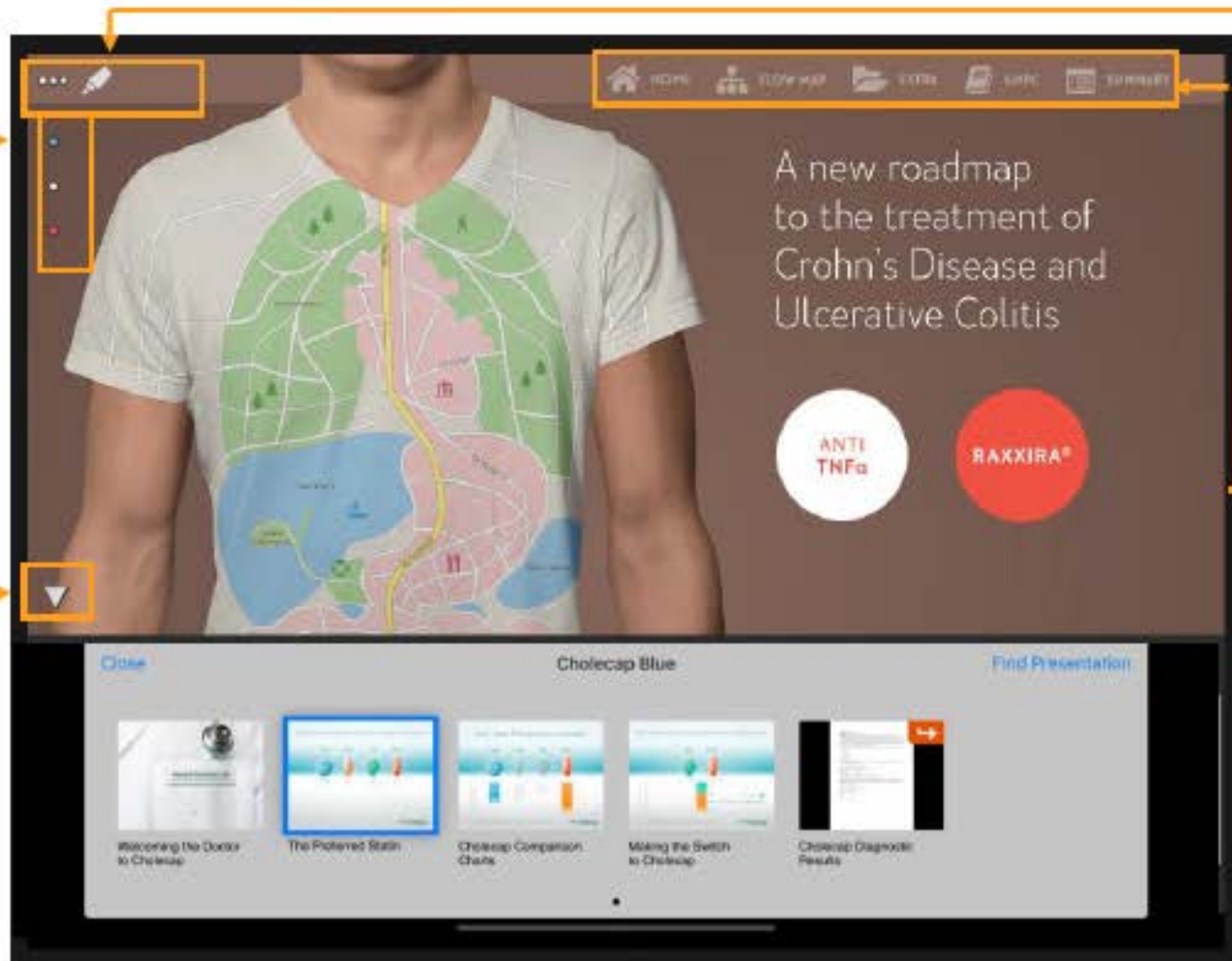
Action Buttons Area
Entire area 60 x 176 pixels
Action button: cannot be disabled or re-skinned, 54 x 36 pixels
Highlighter: Configured on/off on an organization-wide level
**History buttons:** Can be disabled per slide

Custom Navigation
Example only, but can be created within the presentation to create different navigation possibilities.
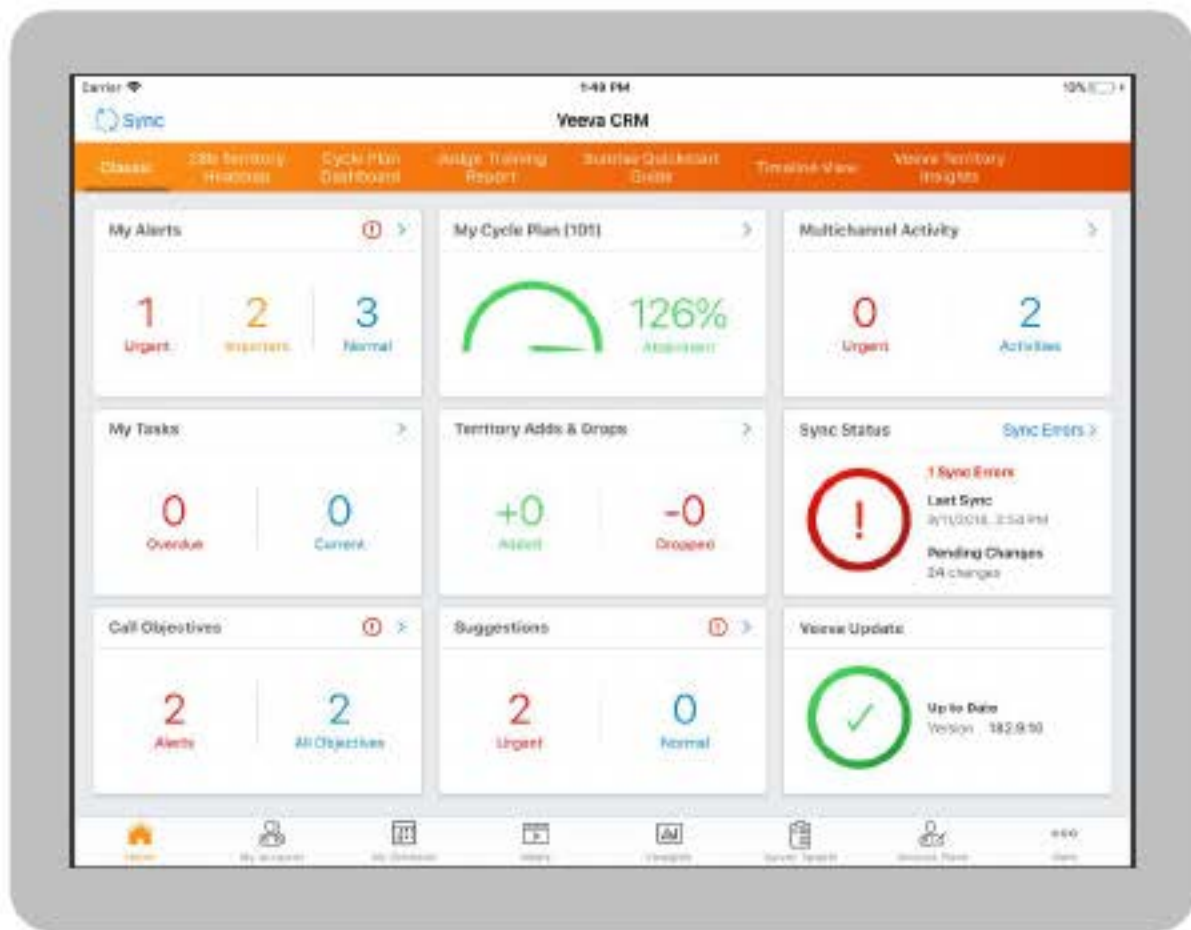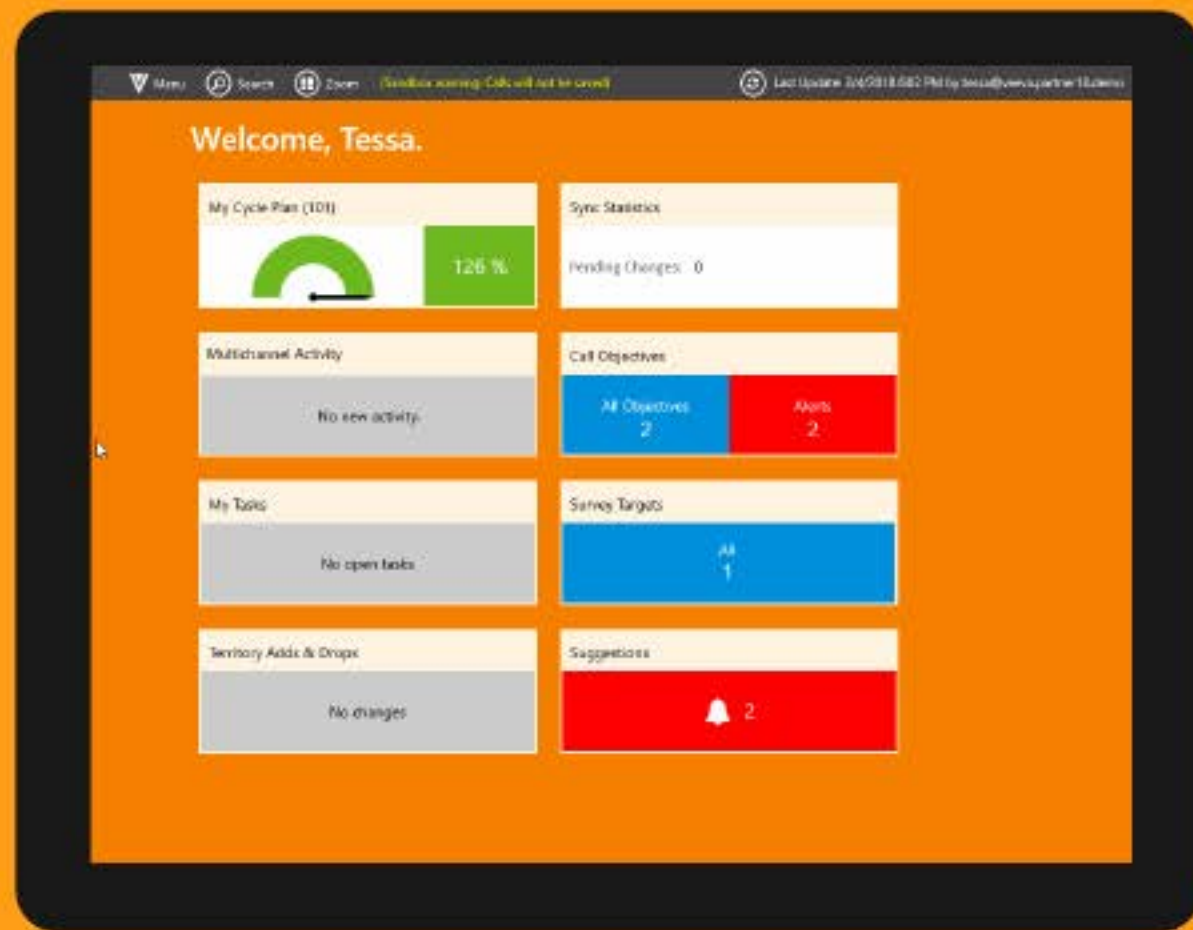
Find Presentation

- Overview
  - While presenting CLM, users can now more easily navigate to a new presentation. The Find Presentation button will launch the regular media library
  - Upon re-entering media library, any search, labels, etc. used earlier will be respected
  - All of the media library's functionality, including segments, views, filters, and search, can be used to find and switch to a new presentation
  - This media library hides the presentation in use; Close button takes you back to the slide you were on
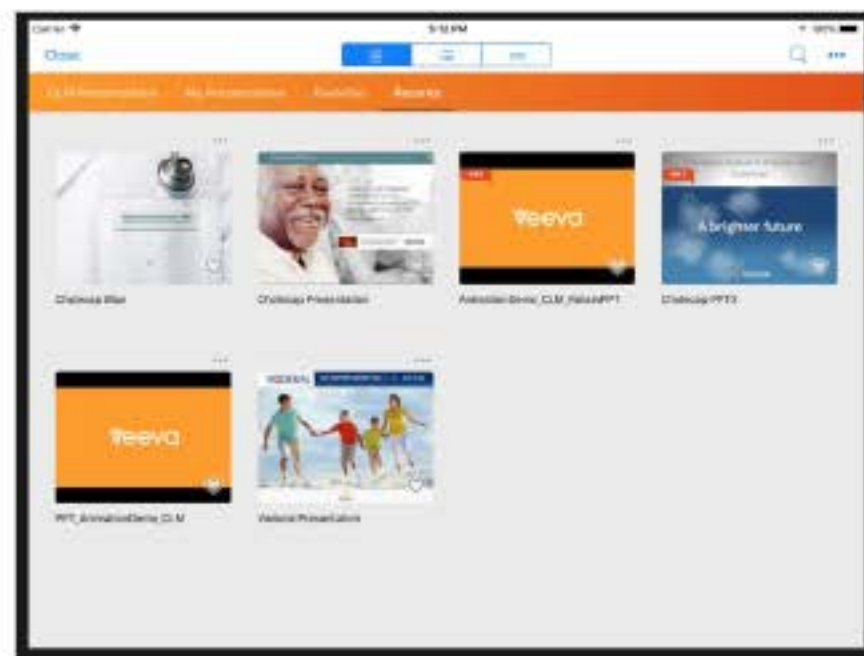
iPad

Windows

Windows will update with Sunrise UI in April 2019

Accessing CLM Presentations in Windows

Menu & Search

- Menu allows reps to navigate the different components of their CRM.

- Search allows them to find HCPs quick.

Multichannel Content

- Reps can access multichannel content most quickly from the Launch Media button.

  - Reps can also access this action button from within an account and beginning a call from there.

My Accounts Dashboard

Accessing CLM Presentations in Windows

CLM Directory

- From here, the Media Directory is very similar to the iPad app.

- You can define attributes by which presentations can be grouped. Reps then have the ability to select the attribute by which to group their presentations, dependent on the grouping attributes defined by the administrators.
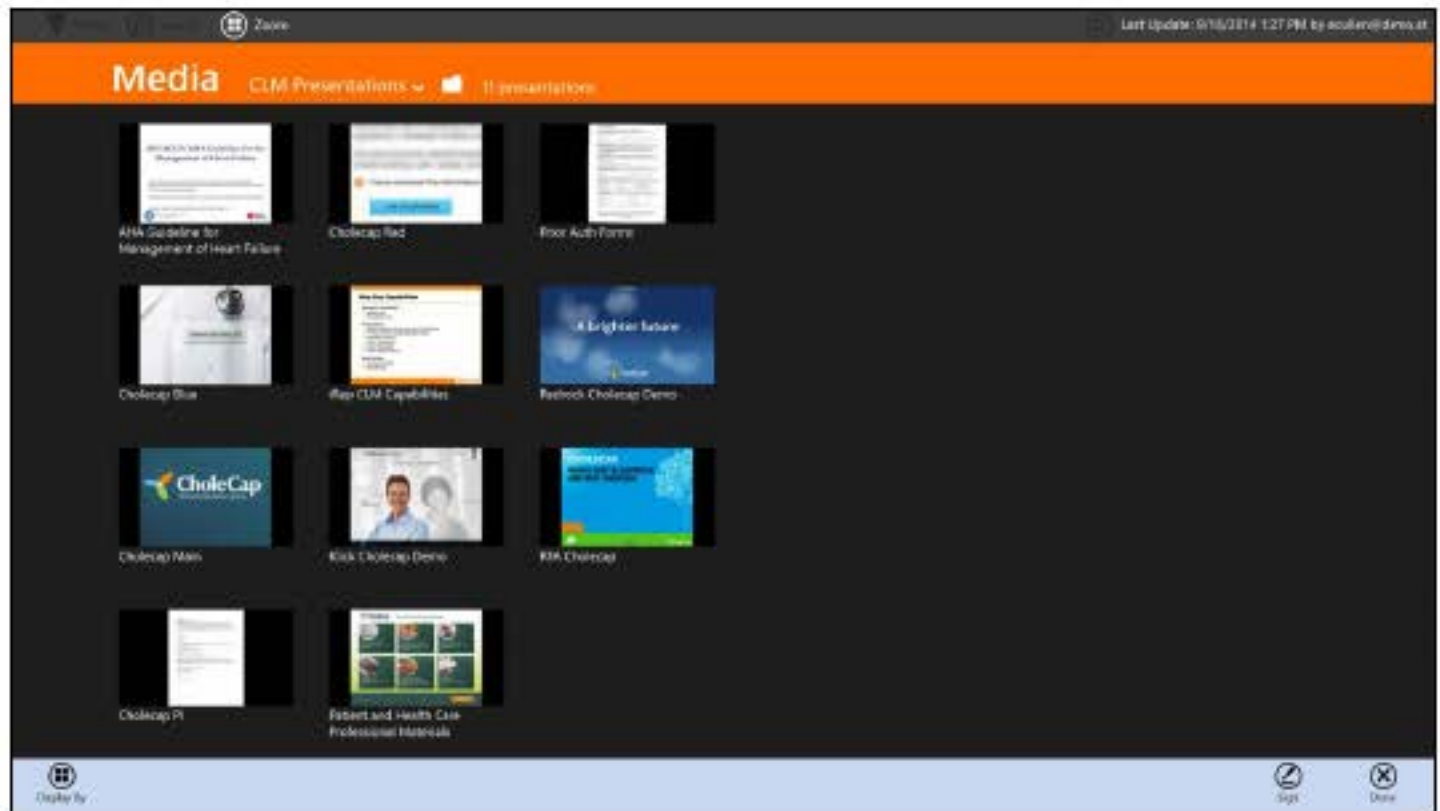
Navigating CLM in Windows

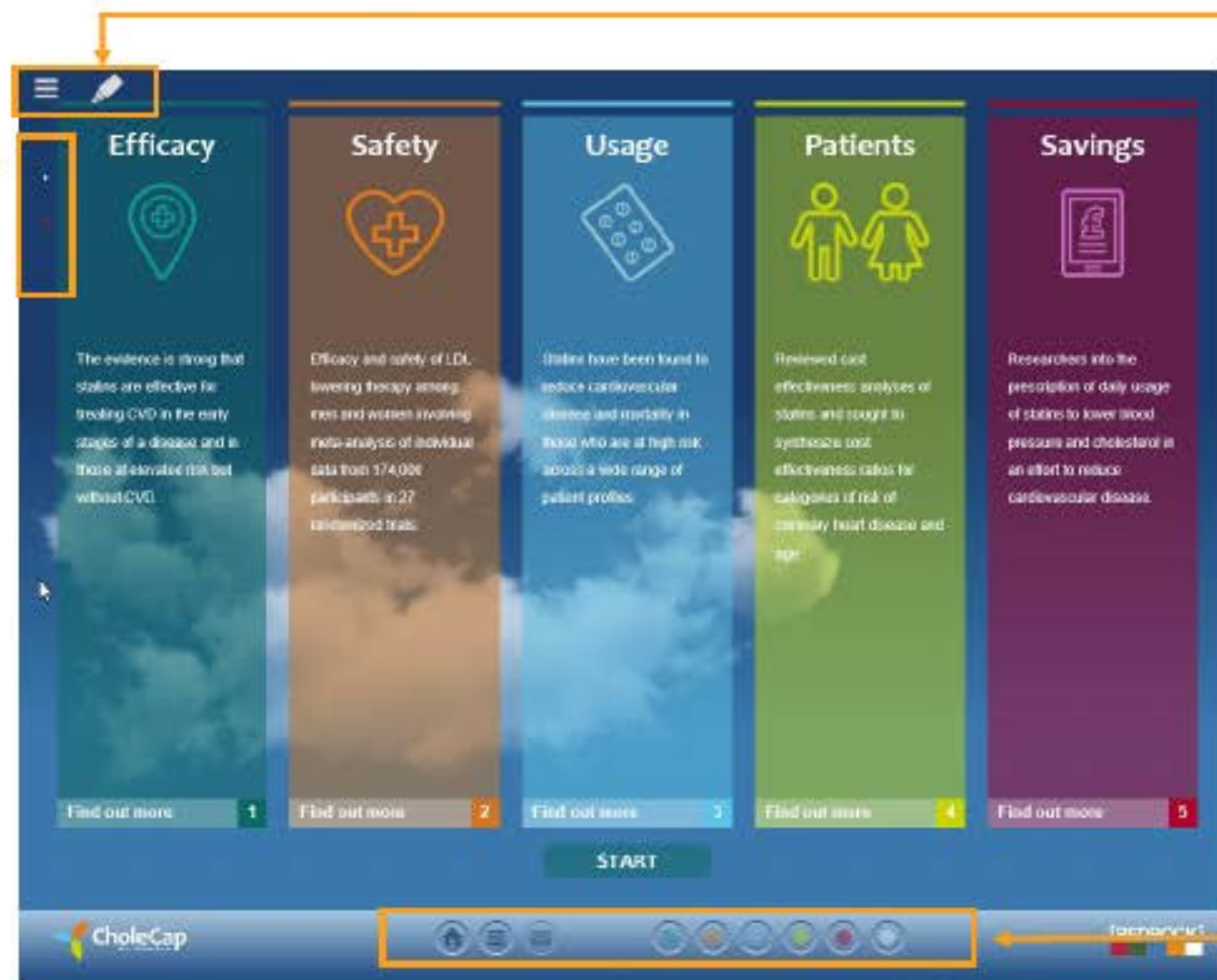## Understanding Slides and the User Experience

Reaction buttons
Can be configured on/off per slide or on an organization-wide basis.

Action Button Area
Action button: cannot be disabled or re-skinned,
Highlighter: Configured on/off on an organization-wide level

Custom Navigation
Example only, but can be created within the presentation to create different navigation possibilities.

Navigating CLM in Windows

Understanding Slides and the User Experience

Navigation Bar
Can be configured on/off per slide. (Shown with slide drawer expanded).

The navigation bar can be accessed by tapping the action button in the top left corner. Within this bar, users can navigate to another slide within the presentation, or use the centrally located drop-down to choose a slide within another presentation

History buttons: Can be disabled per slide. Unlike the iPad, Windows CLM only has standard buttons on the left and right side of the screen.

Tracking and Reporting

Call Reports

- CLM content is tracked out of the box with no additional configuration. Native tracking occurs on a slide basis and tracks:

  - Duration

  - Display order

  - Which presentation the slide was viewed within

  - Start time

  - Reaction (based on what was selected by the user)

  - Version

- If you want to view client reports with live data, you will have to work with your client to get visibility or copies of those reports.

Tracking and Reporting

Call Clickstream

(Example; rep taps on the Play button to start the video - action is captured to the CRM and Call Clickstream object)

- Call Clickstream can capture on-slide interactions and store the data in the Veeva database on the Call Clickstream object.

- Call actions that are built into the content (e.g., rollover text and surveys) are tracked and tied back to the call key message and presentation ID.
    - Veeva provides a JavaScript library for use with developing HTML5 content that interacts with Veeva CRM.
    - Actions / responses can be written to the Call Clickstream object or to their own custom object that records other requests.

See the Multichannel Portal or your Program Manager for in-depth information on Call Clickstream.

Select CLM Features for Consideration

Dynamic Navigation

To create a more customized experience, code can be added to HTML slides in order to link to other slides within the same presentation, or slides within another presentation.

Dynamic Content

In order to tailor content for the participant, dynamic information can be pulled from the account. This can be used to pull in names, specialties, or show a unique slide based on account data.

Required Slides

If certain slides must be accompanied by another slide, you can use our required slide feature to ensure both slides are viewed. The required slide must be viewed for a full 3 seconds before advancing. (ex: Black Box Warning, ISI, etc.) There is a visual representation of this with the thumbnails having a stacked effect

Custom Presentations

Users have the ability to create their own presentations based on the slides they have available to them. This can be configured to only allow slides from a single product to be shown, or to create a presentation including slides from various products

Hidden Presentations/Slides

Slides can be setup as hidden. This will allow those slides to only be accessed if they're navigated to from another CLM slide. They will not be available from the bottom navigation bar.

Training Content

If at any time content is meant for training only, a presentation can be marked as training. This will make the presentation only available in the training tab, and allow a customizable watermark to be placed over the top of the content.

Surveys

- Surveys can be created in the back-end, and render out 1 of 2 ways
- Within the content of a CLM slide (this requires an additional amount of coding by the agency)
- As an overlay (this leverages native UI functionality, and requires no additional coding)

PowerPoint Presentations

Allows users to display CLM content created in PowerPoint with all of its formatting and rich content and no conversion necessary. Presentation opens in PowerPoint and Veeva still tracks the key message.

Shared Resources

HTML assets (i.e. images, ISI, etc.) can be created and approved once and shared across multiple key messages.

Augmented Reality

Enabling more creativity when displaying product metrics, effects, and information. AR overlays virtual objects, called models, onto a lens of the real world, called the scene

We're Here to Help

Resources Available to You

Multichannel Portal Quick Links

- CLM Content Creation Guide
- CLM Technical Training
- CLM Intro Training

CLM Project Checklist

- Utilize this checklist when planning and kicking-off CLM projects.

Program Manager

- Invite your PM on your CLM brainstorm and/or during the project kick-off.
- Ask your PM for a demo of various CLM content.
- Receive training from your PM or self-guide through the documentation.

We've Got You Covered

Strategy & Business
Planning Support

Access to the
Veeva Software

Technical Support &
Training of the
Multichannel Products

Opportunities for fostering
partnership and promotion via
certification, events & more

We Help Support Your
Projects & Your Business

Involve Us Early, Involve Us Often

We Are Your Veeva Strategic and Technical Partners

Product Training: Online or In-Person

Project Brainstorming & Kick-Offs

Product Demos & Configuration

Brand Planning

Product Troubleshooting

Thank you