

PRODUCT SHEET

Vault CRM Suite

Vault CRM Suite integrates key commercial applications and processes for more effective field planning and engagement across personal and digital channels.

Vault CRM is a deep application for life sciences that connects sales, marketing, and medical teams on a single platform with a unified customer database.

Veeva AI for Vault CRM includes deep industry-specific agents embedded in Vault CRM to increase productivity. Initial agents include:

- **Pre-Call Agent** provides individualized customer context, opportunities and suggested actions for better engagement.
- **Media Agent** powers semantic search to locate, summarize and launch content in the content library for quick access to relevant information.
- **Free Text Agent** delivers real-time analysis of free text capture for compliance based on customer specific guidelines defined in natural language.
- **Voice Agent** enables natural language voice as the main input of information into CRM business processes.

Vault CRM Approved Email is an application for sending personal, compliant emails from field users to HCPs.

Vault CRM Engage is an application for digital engagement between field teams and HCPs, enabling call scheduling, video meetings, and compliant chat.

Vault CRM Events Management is an application for managing the end-to-end event lifecycle and related information, including content, attendees, speakers, and expenses.

Vault CRM Align is a field planning application for roster management, territory management, engagement planning, and integrated field feedback.

Veeva Territory Designer is an application used to design optimal geographic territories for field sales and medical teams.

Vault CRM Service Center is an application for inside sales and customer service teams that enables inbound and outbound engagement across channels, with all data captured in Vault CRM.

Vault CRM Campaign Manager is an application for life sciences marketers to coordinate sales and marketing engagement in unified campaigns using both non-personal and field channels.

Veeva Network is a global master data management platform and customer master application designed for global pharmaceuticals and biotech.

Veeva Nitro is an analytics platform that integrates commercial data sources.

Vault Patient CRM is an application for managing patient support programs and protected patient data (PHI/PII) on the Vault platform.

PRODUCT	ANNOUNCED	STATUS	CUSTOMERS
Vault CRM	2022	Mature	100+
Veeva AI for Vault CRM	2025	Early	0
Vault CRM Approved Email	2013	Very Mature	100+
Vault CRM Engage	2018	Mature	100+
Vault CRM Events Management	2015	Mature	100+
Vault CRM Align	2015	Mature	51–100
Veeva Territory Designer	2020	Mature	11–50
Vault CRM Service Center	2023	Early	1–10
Vault CRM Campaign Manager	2023	Early	1–10
Veeva Network	2013	Very Mature	100+
Veeva Nitro	2018	Mature	11–50
Vault Patient CRM	2024	Early	0

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Vault CRM

Vault CRM is a deep application for life sciences that connects sales, marketing, and medical teams on a single platform with a unified customer database. It enables key capabilities such as customer profiling, content sharing and management, territory and account planning, key account management, sampling, and field engagement.

Core capabilities support critical region-specific business requirements and regulatory needs. Vault CRM is accessible online via a browser and desktop application, with full offline support on the iPad, iPhone, and Android.

Veeva AI for Vault CRM – featuring Pre-call Agent, Media Agent, Free Text Agent, and Voice Agent – will be available at no cost through 2030.

Announced	2022
Status	Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Lives with Approved Email, Events Management, Engage, Service Center, Campaign Manager Connected with PromoMats, MedComms, Align, Network, Link

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Veeva AI for Vault CRM

Deep industry-specific agents embedded in Vault CRM to increase productivity. Veeva AI Agents can be configured or extended by customers.

Pre-Call Agent provides individualized customer context, opportunities and suggested actions for better engagement.

Media Agent powers semantic search to locate, summarize and launch content in the content library for quick access to relevant information.

Free Text Agent delivers real-time analysis of free text capture for compliance based on customer specific guidelines defined in natural language.

Voice Agent enables natural language voice as the main input of information into CRM business processes.

Available at no cost through 2030.

Announced	2025
Status	Early
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	0
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Engage, Events Management, Service Center, Campaign Manager Connected with PromoMats, MedComms

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Vault CRM Approved Email

Approved Email is an application within Vault CRM that allows users to send compliant emails to HCPs in a unified experience. Users can quickly assemble an email selecting approved templates, content fragments (links in the email), and optional personalization (such as a personal greeting).

Emails can be scheduled and sent on behalf of field users by the home office or suggested by next best action engines.

Email activity (such as sends, opens, and click-throughs) is automatically captured and recorded in Vault CRM, providing insight about content and engagement effectiveness.

Announced	2013
Status	Very Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Engage, Events Management, Service Center, Campaign Manager Connected with PromoMats, MedComms

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Vault CRM Engage

Engage is an application for digital engagement between Vault CRM users and HCPs. Users can schedule meetings, meet in video calls, chat compliantly with HCPs and staff, and share approved content. This application is accessed directly in Vault CRM for end users and via the browser or a standalone application for HCPs.

Engage uses Approved Email to support compliant invitations that allow attendees to schedule meetings or meet virtually through their device of choice.

All engagement activity is automatically captured in Vault CRM.

Announced	2018
Status	Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Approved Email, Events Management, Service Center, Campaign Manager

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Vault CRM Events Management

Events Management is an application for managing the end-to-end event lifecycle and related information, including content, attendees, speakers, and expenses. This application supports multiple field-initiated event types, such as speaker programs, advisory boards, roundtables, and other fee-for-service engagements.

Users can create event requests, identify compliant content, determine budget and expenses, identify speakers and attendees, and initiate approval workflows.

Events Management works seamlessly with Approved Email for attendee invitations, PromoMats for approved content, Engage for virtual event content sharing, and Vault CRM or OpenData to reconcile attendees for transparency reporting.

All events activity is automatically captured in Vault CRM.

Announced	2015
Status	Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Approved Email, Engage, Service Center, Campaign Manager Connected with OpenData, PromoMats, MedComms

PRODUCT SHEET

Vault CRM Align

Align is a field planning application for roster management, territory management, engagement planning, and integrated field feedback. This application is powered by business rules to manage current and future alignments, including the definition of the territory, the target customer list, and engagement goals by channel.

End users can provide feedback on proposed future alignments and engagement plans directly within Vault CRM.

Announced	2015
Status	Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	51–100
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM Connected with Veeva Territory Designer

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Veeva Territory Designer

Territory Designer is a desktop application for defining geographic territory structure and hierarchy, and visualizing those territories on a map to support decision making. Maps can be exported to PowerPoint for external sharing and presentation.

Territory definitions are based on geography, aggregate workload capacity, aggregate market potential, and constraints such as drive time.

Announced	2020
Status	Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	11–50
Platform	Application-specific
Integrations	Connected with Align

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Vault CRM Service Center

Vault CRM Service Center is an application for inside sales and customer service teams that enables inbound and outbound engagement across channels, with all data captured in Vault CRM.

This application includes full case management, omnichannel integration, case collaboration with integrated Microsoft 365 tools, and industry-specific capabilities including consent, sampling, call reporting, and compliant content.

Service Center is part of Vault CRM Suite, which means all customer-facing teams work from the same customer data, content, and key processes to deliver a customer-centric experience.

Announced	2023
Status	Early
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	1–10
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Approved Email, Engage, Events Management Connected with PromoMats, MedComms

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Vault CRM Campaign Manager

Campaign Manager is an application for life sciences marketers to coordinate sales and marketing engagement in unified campaigns using both non-personal and field channels.

This application enables segmented, multi-action campaigns including marketing email, field email, and field suggestions, with additional channels to come. Prebuilt campaign templates speed campaign creation and execution. All campaign metrics are stored in Vault CRM to easily measure campaign performance.

Campaign Manager lives with Vault CRM, which means that all data, content, and workflows are in one place. This enables collaboration across customer-facing teams and leads to better sales and marketing performance.

Announced	2023
Status	Early
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	1–10
Platform	Veeva Vault
Integrations	Requires Vault CRM Lives with Vault CRM, Approved Email, Engage, Events Management Connected with PromoMats

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Veeva Network

Network is a global, multi-domain master data management platform and customer master application for pharmaceuticals and biotech. This application comes with a predefined data model to support the management of customer reference data, including data change requests from field teams in Vault CRM. Companies can master their reference data alongside third-party data, such as OpenData, to ensure a single source of truth for customer data.

The Network business portal and widgets allow access to customer data for commercial business users.

Companies can build additional data domains (such as product or payer) for data mastering beyond customer.

Announced	2013
Status	Very Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	100+
Platform	Application-specific
Integrations	Connected with Vault CRM, OpenData, Nitro

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Veeva Nitro

Nitro is an analytics platform that integrates commercial data sources. Deep integration with Vault CRM allows seamless data exchange and automatic updates in the platform for Vault CRM configuration and metadata changes.

Nitro stores data in Amazon Redshift and has prebuilt industry connectors for Veeva and select third-party data sources. Nitro Explorer offers an integrated visualization tool to allow end users the ability to navigate stored data, minimizing the reliance on third-party visualization tools.

Announced	2018
Status	Mature
Customer type	Enterprise Pharma, Biotech, Animal Health, Consumer Health
Customers	11–50
Platform	Application-specific
Integrations	Connected with Vault CRM

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Vault Patient CRM

Patient CRM is an application to enable patient services teams with patient journey navigation, engagement channels, and content management capabilities.

Built on the Vault platform, Patient CRM leverages proven deep functionality to now focus on patient services and engagement.

HIPAA-compliant security features protect patient data and manage consent while enabling cross-team collaboration.

Announced	2024
Status	Early
Customer type	Enterprise Pharma, Biotech
Customers	0
Platform	Veeva Vault
Integrations	Lives with Service Center, Approved Email, Engage Connected with Vault CRM, PromoMats, MedComms