



Product Metrics Configuration

Veeva Professional Services





















Module Objectives

- **Define Product Metrics / Ratings and Evaluations**
- **Create a custom Product Metrics field**
- **Create a Metrics Configuration record**
 - Including Detail Groups and Detail Topics metrics
- **Control access to Product Metrics fields**



What are Product Metrics?


- Account level ratings and evaluations for products
 - Dr. Ackerman is a high prescriber of Cholecap and and expert speaker for AMX
- Users only see metrics for the products in their My Setup
- Product metrics values can be uploaded via backend processes or entered by users

















▼ Ratings and Evaluations				
	Awareness	Segment	Movement	Speaker Skills
AMX	 Advocate	 Grow		 Expert
FEM	 Advocate	 Grow		 Intermediate
CABASES	 Aware	 Grow		 Intermediate
Cholecap	 Aware	 Guard		 Intermediate
Restolar	 Prefers	 Guard		 Novice

Product Metrics by Profiles

- Different user profiles can access different sets of product metrics
 - Primary Care: Awareness, Segment, Decile, Movement (Rx)
 - Managed Markets: Selling Stage, Formulary Status, Payer Rx
 - MSL: Speaker Skills, Trial Readiness

▼ Ratings and Evaluations

Common 

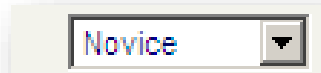
	Selling Stage	Formulary Status	12 mo TRx Chg
FEM	 Post-Launch	On Formulary 	 3.0% 
CEKANCE	 Post-Launch	On/Restricted 	 -2.0% 
Labrinone	 Pull Through	On/Prior Auth 	 3.0% 
XYKEX	 Pull Through	Tier 3 	 5.0% 

Product Metric Field Types

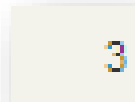
- **Box Picklist**



- **Text Picklist**



- **Number**



- **Arrow**



- **Checkbox**



Product Metrics Object

- **Child of the Accounts object**
 - Include Product Metrics fields in My Accounts views

Download to Excel		<div><button>New</button><button>Mass Update</button><button>Schedule a Call</button><button>More Actions ▼</button></div>			
<input type="checkbox"/>	Name ▲	Target?	Street Address	City	Cholecap-Awareness
<input type="checkbox"/>	Ackerman, Clinton	<input checked="" type="checkbox"/>	967 Millbrook Rd	Newton	Aware
<input type="checkbox"/>	Adler, Kathleen	<input type="checkbox"/>	42 Van Horn Rd	Newton	Prefers
<input type="checkbox"/>	Allen, Henry	<input type="checkbox"/>	97 W Parkway	Pompton Plains	Advocate

- Limit the number of metric fields to 5 or 6 on Account page layouts
- Box picklists can have no more than 10 values

Account Page Layout Configuration

- Create a page layout section called Ratings and Evaluations
 - Add the Ratings_vod S-Control
- Use FLS to control user profiles access to Product Metrics fields
 - Visible and read-only

Account Detail [Edit] [Delete] [Record a Call]

▼ Hospital detail

Name Chilton Memorial Hospital [View Hierarchy]

Parent Account

Website <http://www.chilton.com>

▼ Key Indicators

YTD Calls 2

Target? ☒

Call Class A

▼ Ratings and Evaluations

Common

	Awareness	Segment	Movement
FEM	<div><div></div><div></div><div></div><div></div><div></div></div> Prefers	<div><div></div><div></div><div></div><div></div><div></div></div> Grow	<div><div></div></div> 2.00%
CEKANCE	<div><div></div><div></div><div></div><div></div><div></div></div> Prefers	<div><div></div><div></div><div></div><div></div><div></div></div> Guard	<div><div></div></div> 4.00%
Labrinone	<div><div></div><div></div><div></div><div></div><div></div></div> Aware	<div><div></div><div></div><div></div><div></div><div></div></div> Grow	<div><div></div></div> 4.00%
XYKEX	<div><div></div><div></div><div></div><div></div><div></div></div> Prefers	<div><div></div><div></div><div></div><div></div><div></div></div> Guard	<div><div></div></div> 2.00%



Product Catalog – No Metrics

- Create the detail product(s) in the product catalog
- Set the No Metrics field to true for a product to prevent it from appearing in Product Metrics

The screenshot shows the 'Product Catalog' interface for a product named 'Cholecap'. The interface includes a header with the product name and a sub-header with navigation links: 'Product Catalog [6]', 'Key Messages [3]', 'Product Plans [1]', and 'Notes & Attachments [1]'. Below this is the 'Product Catalog Detail' section with buttons for 'Edit', 'Delete', and 'Clone'. The main form contains several fields: 'Product Name' (Cholecap), 'Parent Product', 'Product Type' (Detail), 'Therapeutic Area' (Cardiology), 'Therapeutic Class' (High Cholesterol (Statins)), 'Description', 'Sample Quantity', 'Require Key Message On Detail' (checkbox), 'Display Order', and 'No Metrics' (checkbox). The 'No Metrics' field is highlighted with a red box. Below the main form is a section titled 'Key Indicators' with a dropdown arrow, containing 'Controlled Substance' (checkbox) and 'Company Product' (checkbox with a checkmark). Two callout boxes provide additional context: one points to the 'Product Type' field stating 'Products of type Detail, and Detail Topic are displayed', and another points to the 'No Metrics' field stating 'Disable Product Metrics for a product with the No Metrics field'.

Product Catalog Detail	
Product Name	Cholecap
Parent Product	
Product Type	Detail
Therapeutic Area	Cardiology
Therapeutic Class	High Cholesterol (Statins)
Description	
Sample Quantity	
Require Key Message On Detail	<input type="checkbox"/>
Display Order	
No Metrics	<input type="checkbox"/>

▼ Key Indicators

Controlled Substance	<input type="checkbox"/>
Company Product	<input checked="" type="checkbox"/>

Product Security

- To configure the product(s) users can see:
 - All Tabs → My Setup
 - Edit the My Setup page for each user
- A row for each product is displayed

- Company products are **bold**
- Competitor products not bold

My Setup Edit Edit

My Setup Products For Self

Company Products	
<input checked="" type="checkbox"/> AMX	<input type="checkbox"/> AKK OXHES N4A
<input checked="" type="checkbox"/> CABASES	<input type="checkbox"/> CEKANCE

▼ Ratings and Evaluations

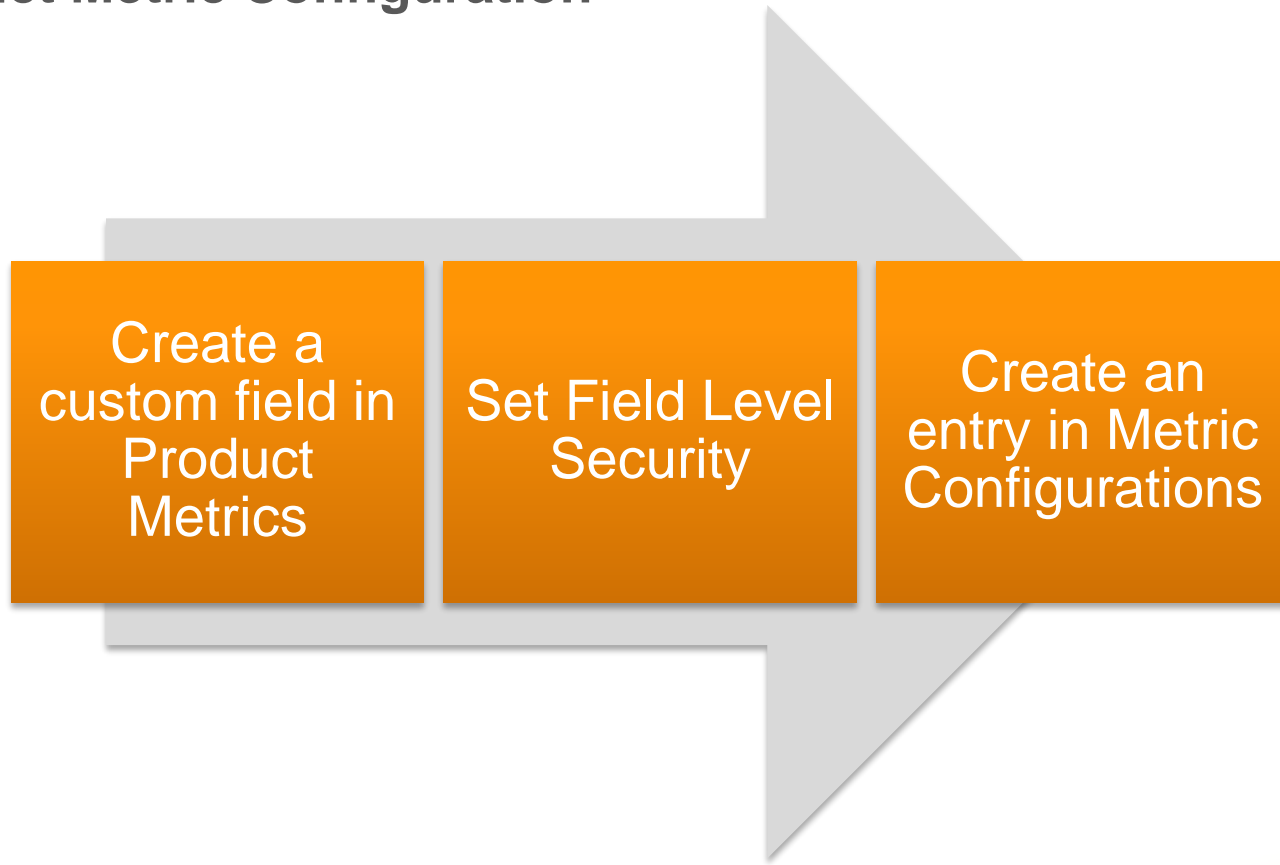
	Awareness	Segment	Movement
AMX	<div><div></div><div></div><div></div><div></div><div></div></div> Aware	<div><div></div><div></div><div></div><div></div></div> Guard	<div><div></div></div> 5.00%
FEM	<div><div></div><div></div><div></div><div></div><div></div></div> Developing	<div><div></div><div></div><div></div><div></div></div> Maintain	<div><div></div></div> 4.00%
CABASES	<div><div></div><div></div><div></div><div></div><div></div></div> Prefers	<div><div></div><div></div><div></div><div></div></div> Inactive	<div><div></div></div> 4.00%

Product Metric Configuration



Adding a New Product Metric: 3 Step Process

- **Product Metric Configuration**



Step 1: Create a Custom Field in Product Metrics

- **To create custom Product Metrics fields:**
 - Setup → Create → Objects → Product Metrics
- **Create new field(s) with one of the following data types:**
 - Picklist
 - Number
 - Currency
 - Percentage
 - Checkbox



Certain fields require special care. Do not modify or delete the Name, Accounts, Products, and Mobile ID fields.



Step 2: Set Field Level Security

- **Determine which Profiles need read and edit access to the Product Metrics fields**
 - Ex: Sales reps are not allowed to change the Movement field value which is fed in from an external source

SaveCancel

Field Label	12 mo TRx Chg
Data Type	Percent(3, 1)


Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
EMEA - Managed Markets Sales - Platform	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EMEA - Primary Care Sales - Platform	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

















Use FLS to control whether a Product Metric field can be edited

Step 3: Create Metric Configurations

- **Columns are controlled by Metric Configurations object**
 - Controls how product metrics fields should appear
 - Controls which account record types should display the product metric field

▼ Ratings and Evaluations

Common 

	Awareness	Segment	Movement
FEM	 Prefers	 Grow	 2.00% 
CEKANCE	 Prefers	 Guard	 4.00% 
Labrinone	 Aware	 Grow	 4.00% 
XYKEX	 Prefers	 Guard	 2.00% 

Step 3: Create Metric Configurations

■ All Tabs → Metric Configurations

- Metric: Copy and paste the API Name of the Product Metrics field
- In the Display Order field, Enter a numeric value in the Display Order field that corresponds to the order in which this metric is displayed

Field Label	12 mo TRx Chg
Field Name	X12_mo_trx_chg
API Name	X12_mo_trx_chg__c

Metric:

Display Order:

Detail Topic: ☐

Detail Group:

Applies To:

Available

All

Practice_vod

Professional_vod

Pharmacy_vod

Chosen

MCO_vod

MCO Plan_vod


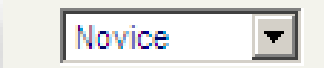
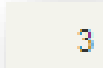


Metric Type –
Arrows require
threshold values:
Red/Yellow:
Threshold when the
arrow changes from
red to yellow
Yellow/Green:
Threshold when the
arrow changes from
yellow to green
Any value in
between will be
yellow

Control Account
record types the
Metric Configurations
records applies to



Step 3: Create Metric Configurations


- Use the following field type to match the desired metric type:

















Box Picklist	Text Picklist	Number	Arrow	Checkbox
<ul style="list-style-type: none">Picklist	<ul style="list-style-type: none">Picklist	<ul style="list-style-type: none">NumberCurrencyPercentage	<ul style="list-style-type: none">NumberCurrencyPercentage	<ul style="list-style-type: none">Checkbox
				

Product Metrics Considerations

- **When adding new Account record types:**
 - Decide if Product Metrics data needs to be displayed for new record types
 - Update Applies To multi-value picklist in the Metric Configurations object and add the new record type(s) to the list

▼ Ratings and Evaluations

Common 

	Awareness	Segment	Movement
FEM	 Prefers	 Grow	 2.00% 
CEKANCE	 Prefers	 Guard	 4.00% 
Labrinone	 Aware	 Grow	 4.00% 
XYKEX	 Prefers	 Guard	 2.00% 

Detail Group and Detail Topics in Product Metrics

- Product Metrics can be defined for Detail Groups and Detail Topics in the same way they are used for Products
- Create Metric Configuration records for Detail Groups and Detail Topics
 - To save time you can clone existing metric configuration records
 - Set the Detail Group or Detail Topics attributes as needed

▼ Ratings and Evaluations

	Common	Cardiology	Oncology	
	Awareness	Segment	Movement	
FEM	<div><div></div><div></div><div></div><div></div><div></div></div> Advocate	<div><div></div><div></div><div></div><div></div></div> Grow	<div><div></div></div> 2.00%	
CEKANCE	<div><div></div><div></div><div></div><div></div><div></div></div> Prefers	<div><div></div><div></div><div></div><div></div></div> Guard	<div><div></div></div> 4.00%	
Labrinone	<div><div></div><div></div><div></div><div></div><div></div></div> Aware	<div><div></div><div></div><div></div><div></div></div> Grow	<div><div></div></div> 4.00%	
XYKEX	<div><div></div><div></div><div></div><div></div><div></div></div> Prefers	<div><div></div><div></div><div></div><div></div></div> Guard	<div><div></div></div> 2.00%	

Create Metric Configurations for Detail Group

- When creating or editing the Metric Configuration, follow the same procedure for Products and:
 - Select the Detail Group to enable metrics for the Products associated with the Detail Group OR
 - Select the Detail Group and also check the Detail Topic checkbox to apply the metrics to all topics associated to the named Detail Group

Metric Configuration Edit [Save] [Save & New] [Cancel]

Information

Metric: Awareness__c

Display Order: 1

Detail Topic: ☐

Detail Group: Oncology

Active: ☒

Metric Type: Box_vod

Red/Yellow:

Yellow/Green:

Applies To

Available

- All
- MCO_vod
- MCO Plan_vod

Chosen

- Practice_vod
- Professional_vod
- Pharmacy_vod
- Laboratory_vod

Important Notes about Metrics

- **Make sure user profiles have at least Read permission to the following fields in the Metric Configuration object:**
 - Detail Group
 - Detail Topic
- **The No Detail and No Metric flags on the Product Catalog entry also restrict Detail Topics**



Metrics Control in Ratings and Evaluations

- When viewing Ratings and Evaluations, the user can turn On/Off the tabs which appear at the top of the section

Click on a tab to show metrics for that particular Detail Group

Common tab contains products not associated with a Detail Group and will always display

▼ Ratings and Evaluations

Common

Cardiology

Oncology



	Awareness	
FEM	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Prefers	
CEKANCE	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Prefers	
Labrinone	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Aware	
XYKEX	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Prefers	

Detail Groups Selector

Cardiology

On

Off

Oncology

On

Off

Close

Click on the Edit tab to turn tabs on and off

Metrics Veeva Settings

- **Veeva Setting related to Detail Groups and Detail Topics:**
 - Disable Edit Account Metrics Tab
 - If set to True, users cannot edit the Product Group tabs in the Account Ratings and Evaluations section
 - Default is Unchecked



Product Metrics on iPad



Product Metrics on iPad

My Accounts

Edit

Record a Call

Launch Media

Send Email

Email Opt In

Account Summary

Calendar

Sphere of Influence

Addresses (2)

Affiliations (1)

Survey Targets (1)

Sent Email (4)

Multichannel Consents (2)

Calls (Account) (1)

Veeva CRM

Segnit, Melany

Ratings and Evaluations

	Awareness	Segment	Movement
AMX	Aware	Guard	5.00 %
FEM	Developing	Maintain	4.00 %
CABASES	Prefers	Inactive	4.00 %
Cholecap	Prefers	Grow	-1.00 %
Restolar	Aware	Maintain	2.00 %
XYKEX	Advocate	Guard	-2.00 %

Cycle Plan

No active cycle plan.

Contact Information and Preferences

Phone (212) 555-5555

Do Not Call?

Email msegnit@nyucenter.org

Note: The process for setting up and controlling visibility for product metrics follows the same model as Veeva CRM online

Module Summary

- **Defined Ratings and Evaluations**
- **Listed Product Metric use cases**
- **Defined Products**
- **Created a custom Product Metrics field**
- **Created a Metrics Configuration record**
- **Configured Metric Configuration for Detail Group and Detail Topics**



Labs

Create new products

Create custom Product Metrics field

Define new Metric Configurations entry

Including Detail Groups and Detail
Topics

Test new Ratings and Evaluations
configuration