

 Clinical Operations \Leftrightarrow  Medical CRM

Bring transparency to HCP interactions across clinical study and field medical teams

While clinical research associates (CRAs) and medical science liaisons (MSLs) often interact with the same investigators and other healthcare providers (HCPs), there is limited visibility into their activity details as each group uses separate, siloed systems. Uncoordinated interactions and inefficient communication can often frustrate sites and investigators, negatively impacting engagement and hampering study enrollment.

The Veeva Clinical Operations to Medical CRM Connection bridges the gap between study teams and MSLs, driving collaboration and visibility at scale to get treatments to patients faster.

Quickly get answers to questions such as:

Clinical	Medical
<ul style="list-style-type: none">When is the MSL scheduled to go onsite?What topics related to my study did the MSL speak to the HCP about?Who on the medical affairs team can help me improve enrollment metrics?	<ul style="list-style-type: none">Which trials are this HCP/investigator involved with?What was the latest communication with the site?Where do sites need assistance in enrolling subjects?

Benefits

- Optimize cross-functional coordination:** MSLs can share critical information on local clinical trends and patient needs, enabling data-driven decision-making by study teams.
- Strengthen relationships with HCPs:** Streamline communications to improve engagement and identify future endorsement opportunities.
- Improve study outcomes:** Ensure efficiency and success of trials by utilizing field medical's knowledge and relationships with HCPs to support enrollment.

How it Works

The Veeva Clinical Operations to Medical CRM Connection seamlessly passes records and updates between the two systems. Field mappings bridge the terminology differences between Veeva Clinical Operations and Vault CRM, such as persons and accounts.



This means you can log activities for a certain study against a person and transfer those to CRM for complete transparency and alignment. Get visibility to the person, date of the interaction, communication channel (in-person, video, phone, chat/text, email, other), status (completed or planned), and who owns each record if additional support is needed.

The diagram illustrates the data flow between the two systems. A box on the left highlights the 'Clinical Activities' section in the Veeva Clinical interface, which is then connected by an arrow to the 'Customer Interactions' section in the Veeva Medical CRM interface on the right. Both sections show a list of interactions for a specific person, with the CRM interactions mirroring the clinical activity details.

Veeva Clinical (Top):

Activity ID	Person	Channel	Subject	Date	Complete
ACT-000012	Dr VanNostrand	Phone	Recruitment Support	03 Nov 2022	Yes
ACT-000013	Dr VanNostrand	In-Person	Discuss new Protocol	31 Oct 2022	Yes
ACT-000017	Dr VanNostrand	Phone	Recruitment Support	12 Jun 2023	Yes
ACT-000024	Dr VanNostrand	Phone	Recruitment Support	12 Jun 2023	Yes

Veeva Medical CRM (Bottom):

Call Name	Record Type	Subject	Status	Date	From
C000031124	Vault Clinical Interact...	Discuss Protocol	Submitted	10/24/2023	Tom Frattarola (tom.frattarola@veev...
C000031123	MSL Meeting Brief	Investigator Meetings	Submitted	7/19/2023	
C000031128	Vault Clinical Interact...	Exclusion Criteria Ques...	Submitted	7/13/2023	
C000031070	Vault Clinical Interact...	Recruitment Support	Submitted	6/12/2023	Tom Frattarola (tom.frattarola@veev...
C000031121	MSL Meeting Brief	Roundtable Meeting	Submitted	6/12/2023	
C000031122	Vault Clinical Interact...	Recruitment Support	Submitted	6/12/2023	Tom Frattarola (tom.frattarola@veev...
C000031068	Vault Clinical Interact...	Recruitment Support	Submitted	11/3/2022	Tom Frattarola (tom.frattarola@veev...
C000031065	MSL Meeting Brief	Investigator Meeting	Submitted	11/2/2022	
C000031064	MSL Meeting Brief	Assess Investigator/Sit...	Submitted	11/1/2022	
C000031069	Vault Clinical Interact...	Discuss new Protocol	Submitted	10/31/2022	Tom Frattarola (tom.frattarola@veev...

See the Veeva Clinical to Medical CRM Connector in action.