

Achieve the Right Alignments, Faster

Veeva Vault CRM Align enables collaborative field force management, simplifying and reducing time spent on sales planning.

The seamless integration between Veeva Vault CRM and Vault CRM Align allows commercial teams to operate in a more agile and dynamic way. Align users can create alignments in days instead of weeks, efficiently re-allocate roster members, target the right customers with the most effective channels, and gather field feedback directly from Vault CRM.



Align benefits

90%

fewer process steps

Efficient: A single alignment platform fully integrated with Vault CRM, Align eliminates manual steps (files, handoffs, data uploads) and the need for custom integrations. It is highly reliable and transparent, allowing teams to recognize and resolve any alignment errors on their own before sending them to downstream systems.

75%

less time to perform alignment changes

Agile: Align enables rapid response to market or business changes through sophisticated business rule capabilities, automation, and process flexibility. Easily tailor alignments to the needs of distinct field teams, therapeutic areas, and geographies. Model and compare alignments in minutes before scheduling future implementation.

45%

increase in interactions with high priority HCPs

Productive: Align provides confidence that the correct field resources will be targeting the intended customers through desired channels, unlocking capacity to upskill your home office. Efficiently gather and incorporate field intelligence into the field planning process. Territory Managers, Account Managers, Medical, and other specialists can spend more time with customers and less on troubleshooting their engagement plans.



Align is **10 times faster** than our previous solution. We have more confidence in how we allocate our salespeople against products and territories.

– Ian Knowlton, Senior Director, Commercial Operations, Astellas

[Watch Video](#)

Key features, by capability area



Roster Management

- Roster assignment and on/off-boarding
- Vacancy management (vacation, LOA, temporary coverages)
- CRM user provisioning (content access, permission sets, public groups, Events, Engage, Outlook integration, etc.)
- Workday Integration



Territory Management

- Territory hierarchies
- Alignments definition: zips/bricks, customers, field members, products, targets, content
- Territory map views for swift realignments
- Zip-to-Terr adjustments
- Territory mirroring



Multi-channel Engagement Plans

- Automated target identification via rules engine
- Territory capacity calculations and utilization thresholds
- Multi-channel call plans, with as simple or complex of rules as desired
- Options to include goals for Vault CRM Events, Vault CRM Approved Email, or custom channel activities



Integrated Field User Feedback

- Rep feedback on account alignments, targets, and engagement channels and frequency
- Feedback provided directly in the CRM app to avoid spreadsheets and rep training on new apps
- Customizable feedback reasons and guardrails
- Manager review and approval workflows

Key application features



Seamless integrations with Veeva and Vault CRM

- Alignments built on the latest data from CRM
- Scheduled data loads into CRM from Align



Additional out-of-the-box integrations with Align+ Territory Design tool and incentive compensation partner offerings



Source of Truth for past, present, and future alignments records



Alignment modeling and comparisons



Robust rules engine to automate workflows and schedule changes



Reporting and data extracts



Customizable dashboards and map visualizations



API access



Audit trails