

## 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 insights and suggested actions from relevant data, content, activity, and trends that help reps prioritize the right HCPs and prepare for calls.
- **Media Agent:** Locates, summarizes, and launches content for proactive planning and real-time support during customer interactions.
- **Free Text Agent:** Detects and flags potential issues in call notes to ensure compliance while capturing richer, higher-quality customer insights.
- **Voice Agent:** Enables voice input for Vault CRM so it's faster and easier for reps to capture information and next steps.

**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 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	0–10
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 Campaign Manager	2023	Early	11–50
Veeva Network	2013	Very Mature	100+
Veeva Nitro	2018	Mature	11–50
Vault Patient CRM	2024	Early	1–10

## PRODUCT SHEET

# 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, call center, inside sales, 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 and iPhone.

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.

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

## PRODUCT SHEET

# 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 insights and suggested actions from relevant data, content, activity, and trends that help reps prioritize the right HCPs and prepare for calls.

Media Agent locates, summarizes, and launches content for proactive planning and real-time support during customer interactions.

Free Text Agent detects and flags potential issues in call notes to ensure compliance while capturing richer, higher-quality customer insights.

Voice Agent enables voice input for Vault CRM so it's faster and easier for reps to capture information and next steps.

Available at no cost through 2030.

<b>Announced</b>	2025
<b>Status</b>	Early
<b>Customer type</b>	Enterprise Pharma, Biotech, Animal Health, Consumer Health
<b>Customers</b>	0–10
<b>Platform</b>	Veeva Vault
<b>Integrations</b>	Requires Vault CRM Lives with Vault CRM, Engage, Events Management, Campaign Manager Connected with PromoMats, MedComms

## PRODUCT SHEET

## 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.

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

## PRODUCT SHEET

## 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.

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

## PRODUCT SHEET

# 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.

<b>Announced</b>	2015
<b>Status</b>	Mature
<b>Customer type</b>	Enterprise Pharma, Biotech, Animal Health, Consumer Health
<b>Customers</b>	100+
<b>Platform</b>	Veeva Vault
<b>Integrations</b>	Requires Vault CRM Lives with Vault CRM, Approved Email, Engage, 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.

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



## PRODUCT SHEET

# 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.

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

## PRODUCT SHEET

## 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.

<b>Announced</b>	2023
<b>Status</b>	Early
<b>Customer type</b>	Enterprise Pharma, Biotech, Animal Health, Consumer Health
<b>Customers</b>	11–50
<b>Platform</b>	Veeva Vault
<b>Integrations</b>	Requires Vault CRM Lives with Vault CRM, Approved Email, Engage, Events Management Connected with PromoMats

## PRODUCT SHEET

# 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.

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

## PRODUCT SHEET

# 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.

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

## PRODUCT SHEET

# 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.

<b>Announced</b>	2024
<b>Status</b>	Early
<b>Customer type</b>	Enterprise Pharma, Biotech
<b>Customers</b>	1–10
<b>Platform</b>	Veeva Vault
<b>Integrations</b>	Lives with Approved Email, Engage Connected with Vault CRM, PromoMats, MedComms