

Veeva Vault CRM Events Management

# Speaker Management Innovation Guide



# Overview

Establishing and maintaining strong relationships with expert speakers is crucial in delivering impactful events. When teams are bogged down by the complexities of managing speaker data, focusing on the event experience is harder.

The Speaker Management capabilities of Veeva Vault CRM Events Management automate many administrative tasks involved. It provides specialized tools that centralize and organize speaker information, reduce manual effort, and minimize errors.

All data are stored in Veeva Vault CRM to give a complete picture across engagement channels.

## Speaker Management Key Takaways



Streamlines process throughout the entire speaker management lifecycle.



Ensures compliance and budget adherence.



Benefits multiple teams across the organization.

## Helping Biopharma Teams and Speakers

### Event organizers can:

- | Access detailed speaker information: recent events, training history, speaker utilization rates, and spending caps.
- | Nominate accounts to become new speakers, or renominate existing speakers to be qualified to speak on additional topics.
- | Store and manage contracts, including services and rates, in a centralized system.
- | Filter speakers by training, qualifications, and contracted services.
- | Link speakers to accounts for consistent management and formatting.
- | Schedule speakers for future events based on eligibility and cap status for the next year.

### Compliance and legal departments can:

- | Apply mandatory filters during speaker selection to ensure only eligible speakers are chosen.
- | Centralize speaker contracts to maintain contractual obligations and streamline audits.

### Speakers can:

Access the Speaker Portal to:

- | View upcoming and past events.
- | Download active and expired contracts.
- | Prepare for upcoming events with available resources.

The **Speaker Portal** is enabled and managed within Vault CRM and is included in the Events Management license. Each CRM organization has its own dedicated Speaker Portal. Biopharma can customize the Speaker Portal with its logo, support contact information, privacy policy, and terms of use. Configurations can be done without Professional Services support.

## SPEAKER PORTAL – EVENTS

The screenshot shows the 'SPEAKER PORTAL' interface with a navigation menu on the left containing 'Events' and 'Contracts'. The main content area is titled 'Upcoming Events' and lists three events:

Date	Event Name	Organizer	Date and Time	Location	Key Contact
12 FEB	Medical Education Event Natevba • Natevba Efficacy	Linda Blackburn	12 Feb 2025 · 17:00 12 Feb 2025 · 18:00 Central European Standard Time	Elite Spire Hotel 9880 Manor Road London, United Kingdom SK14 7ML	None
5 FEB	Medical Education Natevba • Natevba Efficacy	Linda Blackburn	5 Feb 2025 · 12:00 5 Feb 2025 · 13:00 Central European Standard Time	Elite Spire Hotel 9880 Manor Road London, United Kingdom SK14 7ML	None
31 JAN	Natevba Efficacy Natevba • Natevba Efficacy	Daphne Rios	31 Jan 2025 · 17:35 31 Jan 2025 · 18:35 Central European Standard Time	Elite Spire Hotel 9880 Manor Road London, United Kingdom SK14 7ML	None

## SPEAKER PORTAL – CONTACTS

The screenshot shows the 'SPEAKER PORTAL' interface with a navigation menu on the left containing 'Events' and 'Contracts'. The main content area is titled 'Active Contracts' and lists two contracts:

Contract Name	Signed Date	End Date
Service Engagement Contract Tier 1 2025 Service Engagement Contract Tier 1 2024	Signed: 9 Jan 2025	1 Jan 2025 - 31 Dec 2025
Tier 1: Natevba MSA Speaker Contract Tier 1 Speaker agreement bureau	Signed: 11 Feb 2025	1 Jan 2023 - 31 Dec 2053

# Speaker Management Features Help Field-Led Events by:

## 1. Storing Speaker Information in CRM

Each speaker can be linked to an account, allowing for seamless data integration.

When linked, the speaker's name is automatically formatted to match the associated account, ensuring consistency across the platform.



Not all speakers need to be tied to an account. Speaker details can be manually entered, adhering to a standardized naming convention for easy searchability.

## 2. Keeping Accurate Training Records

Speakers train on key topics, which are cataloged for selection. Documented training links speakers to topics, ensuring organizers can filter and choose qualified candidates.



Users can select a topic and filter speakers accordingly. Only those trained on the selected topic will be displayed.

## 3. Meeting Contractual Obligations

Events Management includes a module for handling speaker contracts, which details the services a speaker is expected to provide and the associated rates.

All contractual data is stored in one place, making it easier to track the services rendered and the financial terms agreed upon. When a contract is activated, relevant details are automatically updated in the speaker's profile, giving a complete overview of their qualifications and contracted services.

## 4. Tracking Speaker Utilization and Caps

Each time a speaker is engaged for an event, their utilization metrics are updated. This process includes monitoring their annual cap (the maximum value of services they can provide within a year).

The system can automatically reset these values at the beginning of a new year, ensuring that all records reflect the current utilization and spending limits.



This feature is particularly useful in managing speakers across multiple regions with varying compliance requirements.

## 5. Speaker Planning for the Future

Events Management allows event organizers to consider speakers for future events, even if they have reached their cap for the current year. This forward-looking approach ensures that speakers can be booked well in advance, aligning with strategic goals and maintaining a consistent flow of expertise across events.

## 6. Keeping Accurate Training Records

Many compliance rules apply to speaker selection. For example, speaker selection may be limited to speakers with certain training, or with certain contracts in place. The flexible filtering system can be tailored to meet the needs of different event types and regions too.



Use the **Speaker Nomination** feature to facilitate the speaker creation and nomination process for end users.

Filtering speakers ensure that only those who meet specific qualifications are selected for events. These filters are based on several criteria:

- | General training – for example, compliance or speaking training.
- | Topic training – training to speak on a specific topic, such as product usage.
- | Contracted services.

The filters are categorized into three types:

- | **Mandatory:** Automatically applied and cannot be removed.
- | **Optional On:** Automatically applied but can be removed if necessary.
- | **Optional Off:** Not applied by default but can be added manually.

Filters are defined in the Event Rules.

### SPEAKER NOMINATIONS

Name	Status	Title	Credentials	Year to Date Utilization
Abraham, Jean Gold 742 Wilson St. Fort Wayne, GB	Eligible	Specialist Doctor	MD	35
Anderson, William Gold 742 Wilson St. Fort Wayne, GB	Eligible	Specialist Doctor	MD	1
Bailey, Nigel	Expired	Specialist Doctor	MD	0
Berditchevski, Fedor Bronze 978C Golf Street. Round Lake, GB	Eligible	Health Care Aide	MD	2
Berjano Coquillat, Pedro Luis Gold 742 Downing Street - London	Eligible			2
Bhatt, Deepak Gold 742 Wilson St. Fort Wayne, GB	Eligible	Specialist Doctor	MD	9
Blaydes, Jeremy Gold 742 Downing Street - London	Eligible	Health Care Aide	MD	1
Califano, Raffaele Gold 589 Greystone Street. Amsterdam, GB	Eligible	Specialist Doctor	MD	1

### FILTER BY SERVICES

Service
<input type="radio"/> Adboard
<input type="radio"/> Computer Supplies / Internet
<input type="radio"/> Consultation time
<input type="radio"/> EPU
<input type="radio"/> FMC
<input type="radio"/> Local Events
<input type="radio"/> National/International Event
<input type="radio"/> Oncology Advisory
<input type="radio"/> Preparation Time
<input type="radio"/> Preparation Time
<input type="radio"/> Raxxira Speaker service

### FILTER BY TRAINING

Training
<input type="radio"/> CarDeo Content
<input type="radio"/> Cardiovascular Diseases
<input type="radio"/> Compliance Training
<input type="radio"/> Hematologic malignancies
<input type="radio"/> Melanoma treatment updates
<input type="radio"/> Natevba Efficacy
<input type="radio"/> Natevba Training
<input type="radio"/> Non-Hodgkin Lymphoma treatments
<input type="radio"/> Virtual event on CAR T-cell therapy
<input type="radio"/> Virtual event on skin cancer prevention

## 7. Applying Event Business Rules

Events Business Rules act as automatic guardrails to ensure event compliance and minimize planning mistakes. Speaker management examples of Event Business Rules include:

Speaker attendance by expense cap rule: Limits a speaker's attendance based on expense cap.

! *“Warn organizers if committed expenses exceed 10% of the expense cap.”*

Per event speaker expense limit rule: Limits the expenses of an event that can be attributed to an event speaker.

! *“Accommodation expense cannot be more than 300 EUR.”*

Per speaker engagement limit rule: Limits the number of events a speaker can speak at per event type.

! *“Warn organizers if a speaker has already been confirmed on three other speaker programs.”*

Learn more about **Event Business Rules**.



**Event Speaker Business Rules** allow you to introduce an additional level of compliance when validating your speakers.

### SPEAKER EVENT RULE

The screenshot displays the Vault CRM interface for a 'Speaker Service' rule. The main content area shows the following details:

- Name:** T-000000010
- VSPA\_country\_code:** (empty)
- EM Catalog Name:** Local Event
- EM Catalog Status:** Approved
- Description:** Required qualification for Local Events
- EM Catalog Type:** Speaker Service
- Country Code:** (empty)

Below the details, there are two tables:

**Speaker Qualifications**

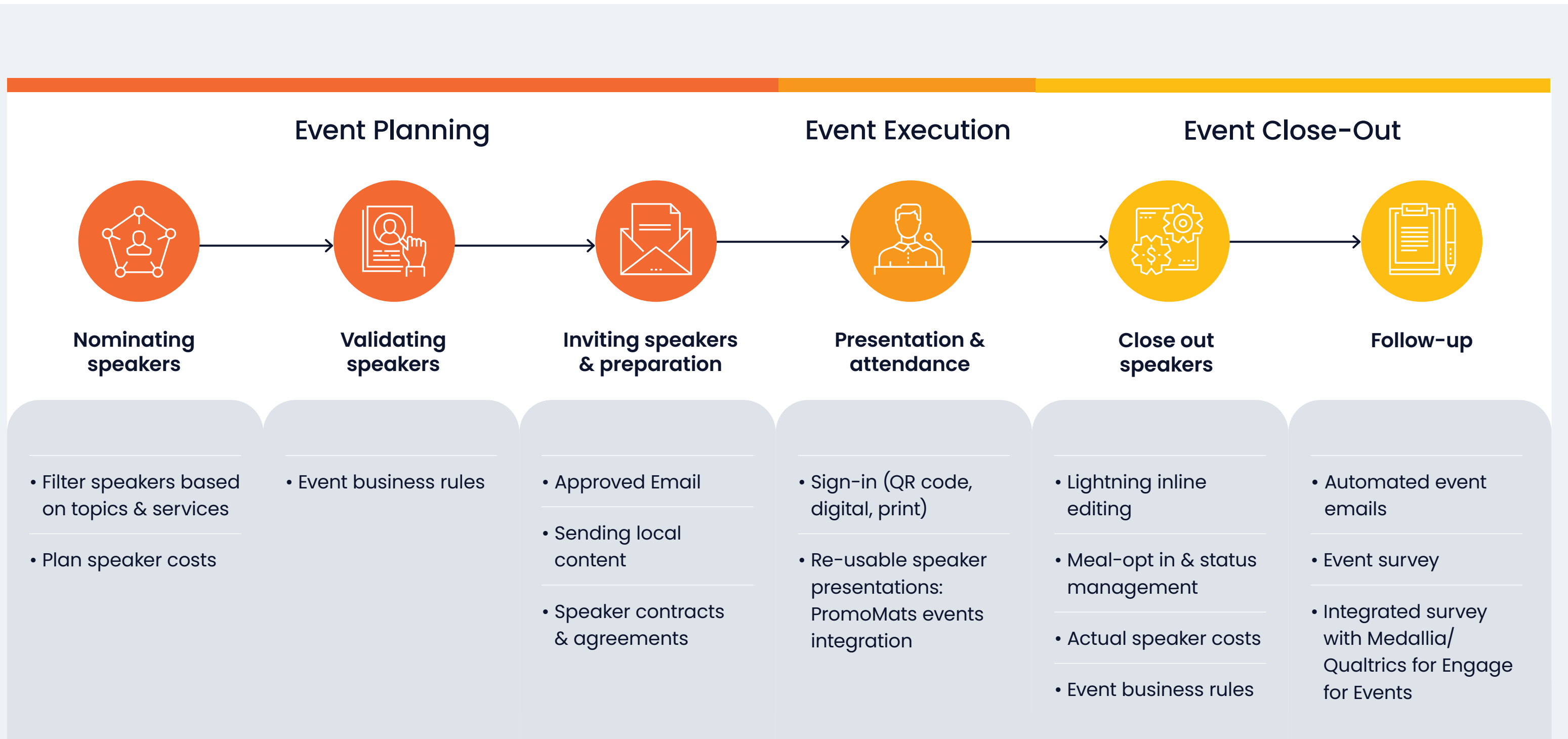
Name	Speaker	Created Date
SQ-000000004	Allen, Richard	17/02/2025 14:23 WET
SQ-000000005	Allen, Richard	18/02/2025 08:48 WET

**Event Rules**

Name	Event Configuration	Event Rule Type
ER-000000031	EC-000000001	Speaker Qualification

The interface also includes a sidebar with navigation options like 'Details', 'Speaker Qualifications (2)', 'Event Rules (1)', 'System Information', and 'Attachments (0)'. The top navigation bar shows 'Vault CRM' and 'Person Accounts'.

# Speaker Management Across the Event Lifecycle





## Keep Learning

- [↗ Veeva Help – Speaker Management](#)
- [↗ Demo: Events Management Speaker Tab](#)
- [↗ Demo: Events Management – Speaker Contracting](#)

Get expert guidance  
on how to start using  
**Speaker Management.**



### ABOUT US

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