

Veeva CRM Suggestions: Lessons from Real-world Experience

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Requirements Gathering

a. Start with existing brand strategy

- Focusing on current priorities increases engagement and momentum
- Leveraging existing brand strategy, analytics, and data lets you get started with what is already operationalized and has organizational buy-in

b. Involve sales representatives early

- Codifying the best practices of your top-performing sales reps helps all reps perform like the best

c. Leverage a flexible, configurable platform

- Each brand may require different use cases, and the use cases will change over time
- The platform used needs to be easily configured (not custom-built) for each brand

Change Management

Thriving in change requires a stepwise approach to ensure success

a. What happened and why?

- Customers engaging through multiple channels
- Big data offers more information
- Technology to deliver insights is improving

b. What opportunity does the change or situation bring forth?

- By leveraging technology to meet customer needs, we can better meet customer needs and drive incremental growth

c. What are the risks in the opportunity?

- Risk is low, and we're focused on key opportunities that we already know work

Suggestions must be designed for change

- a. Single, prioritized feed
- b. Contain all context for rep to make a decision
- c. Consider progress to goals, best times to engage, and rep and HCP location

Communication

- a. Ensure field force is always informed and engaged
- b. Provide regular metrics updates
- c. Coordinate with existing communications (e.g., monthly emails, training)

Training

- a. Launch early with "experts"
- b. Ensure district and regional managers understand goals, functionality, and how to coach
- c. Create hype at POA (plan of action) meeting
- d. Hold frequent update meetings and "office hours"

Measuring Results

- e. **Configuration** – cost and time
- f. **User experience** – surveys
- g. **Adoption** – usage rates, call optimization
- h. **Physician feedback** – NRx (number of new prescriptions) lift, open and click rates of rep-triggered email
- i. **Adaptation** – time to assimilate learnings and implement change

Ongoing Platform Management

- Tweak engine based on ongoing **representative feedback**
- Automatically incorporate **feedback**, such as dismissals
- Update rules to reflect **brand priorities** (e.g. changes in competitors, indications, access, or data sources)
- Use **reporting** to monitor Veeva CRM Suggestions usage and rep actions, identifying re-training opportunities and district manager coaching priorities
- An **integrated learning platform** can leverage data already available to the engine to correlate rep actions with results and provide actionable suggestions back to the brand