

A network diagram composed of various icons connected by thin lines, set against a background of a world map. The icons include a Twitter bird, a laptop, a group of people with speech bubbles, a person, a tablet, a globe with a speech bubble, a gear, a target, and a person with a speech bubble.

# Veeva | European Commercial & Medical Summit

## Implementing Veeva Align – Technical Overview

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1

How is Veeva Align implemented?

2

How can Veeva Align be deployed?

3

What does a typical project plan look like?

4

Summary and Key Takeaways

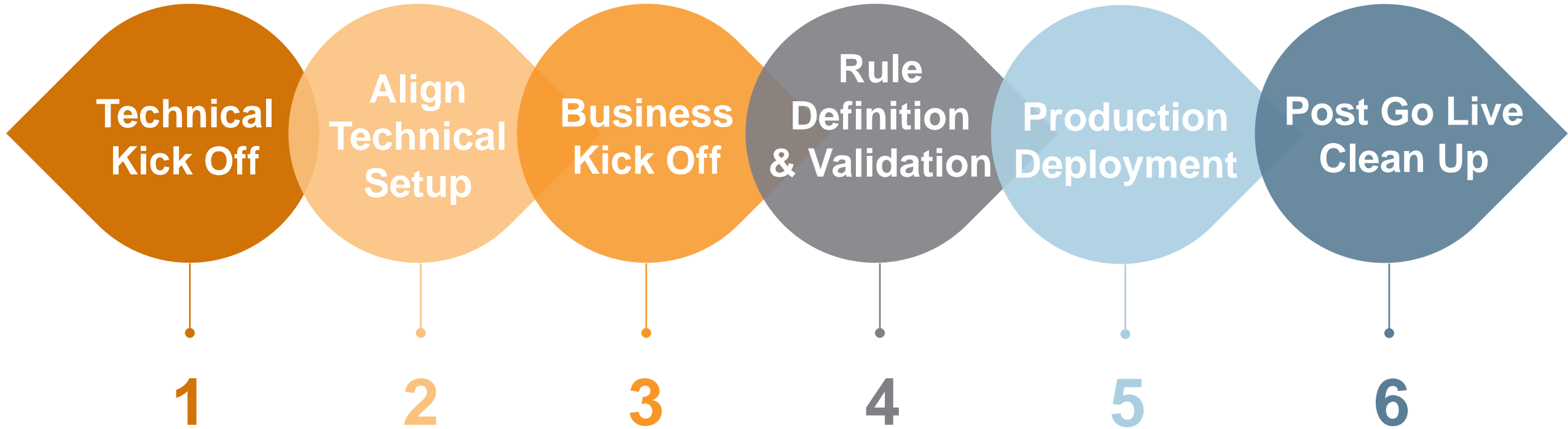
# Agenda

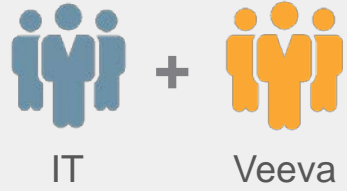


# How is Veeva Align Implemented?



Veeva has developed a **proven process**  
for migrating to Align





A technical workshop to agree on the details of the new architecture

Align Technical Overview

CRM Architecture impact review

Security & Governance

Establish success criteria (KPI's)

As Is Account visibility in CRM

Functional user profile definition

CRM Integration & Data Migration

Define cutover approach

Data visibility & governance

Integration to additional systems

Technical Kick Off





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In the Sandbox, the integration between Align and CRM is set up

Seamless CRM integration



Align

Address & relations

Account

Product

Product Metrics

Roster Member

Account Territory

Customer Data

Products & Metrics

Users

Explicit Assignments

CRM

Account

Address & relations

Product

Product Metrics

User

Account Share

Align & CRM setup



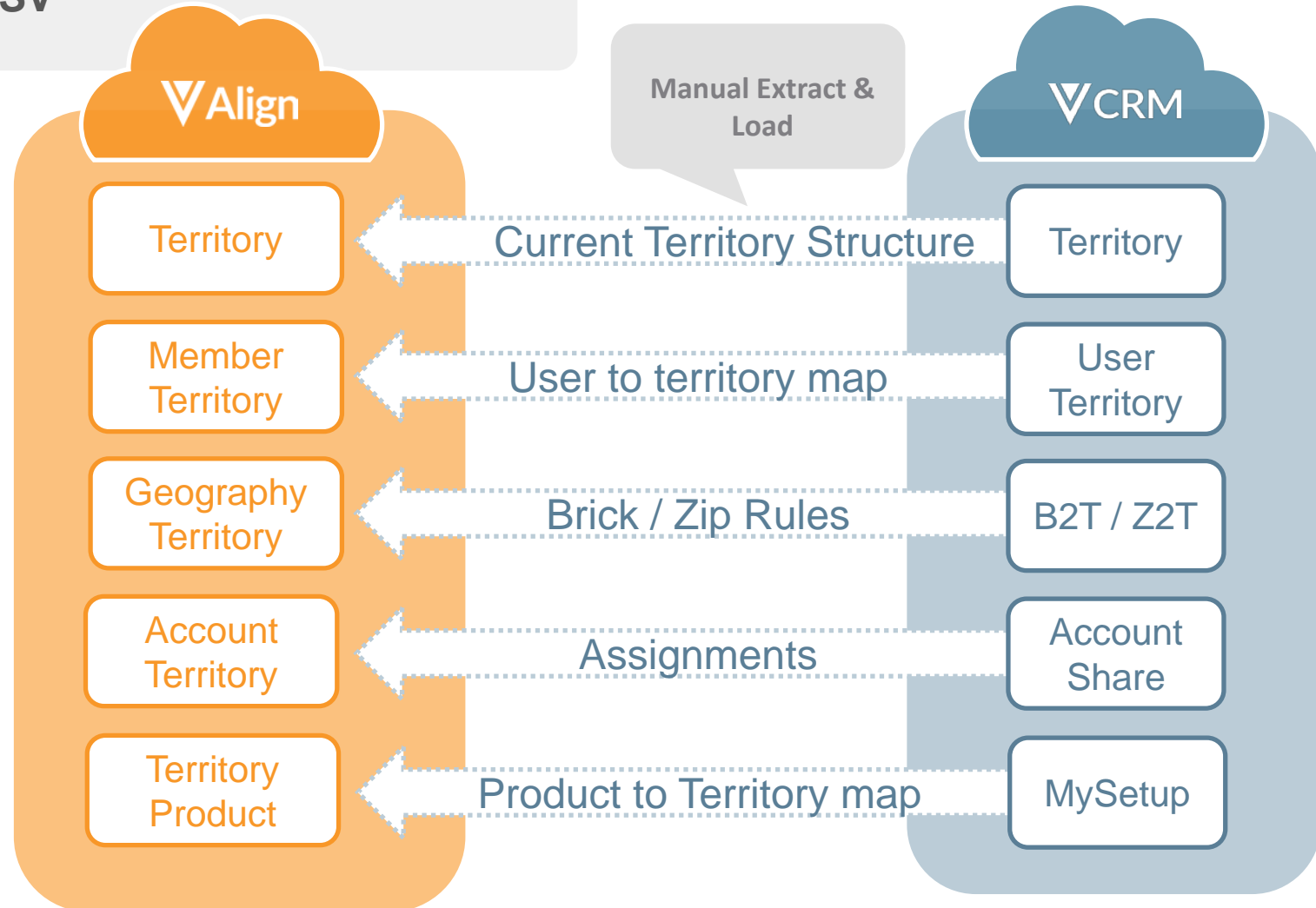


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Data is extracted from CRM and loaded into Align via CSV

Manual Extract & Load

Initial Data Loads

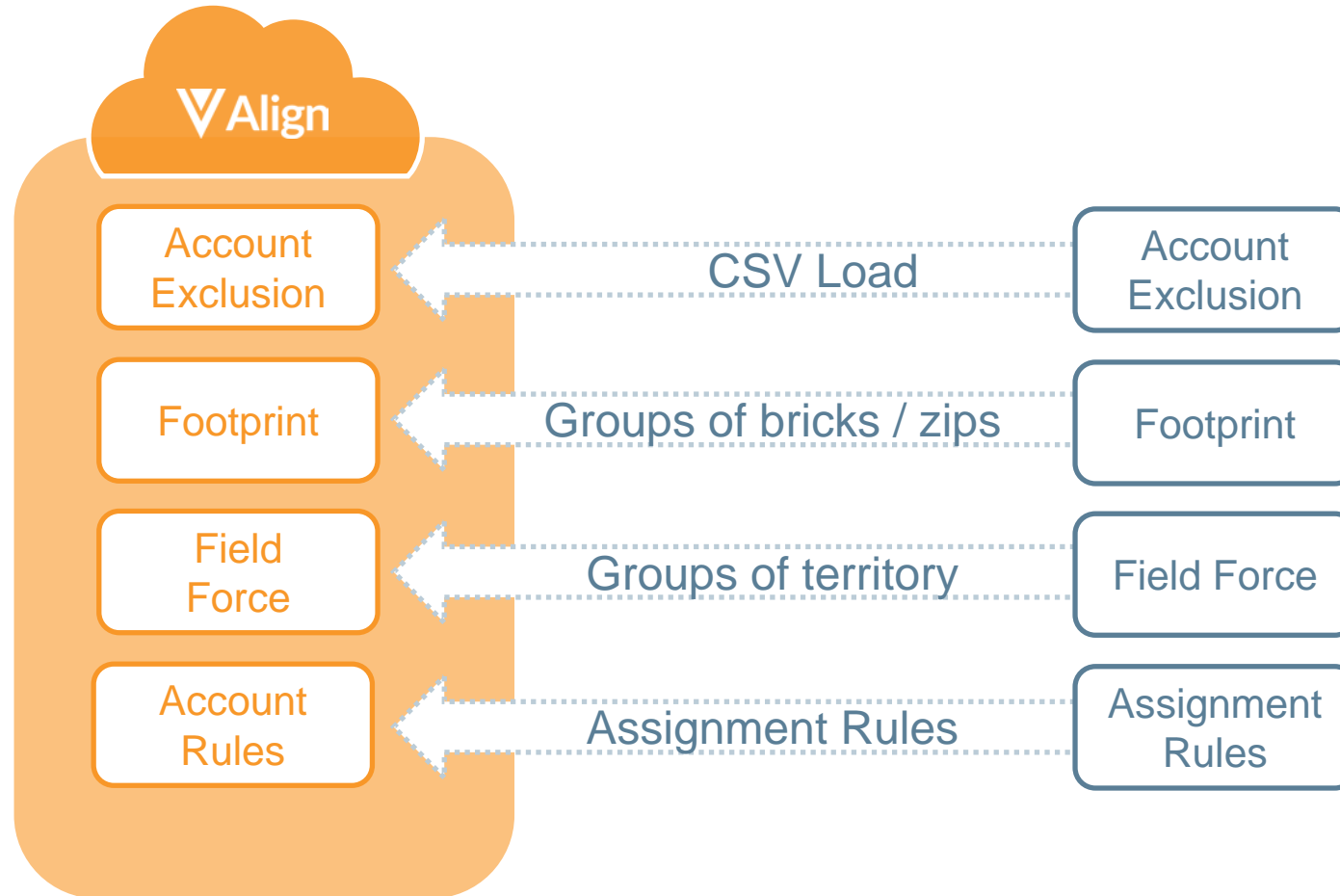




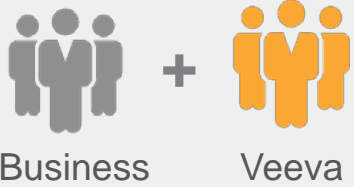
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Additional supporting data can be created in a template and loaded via csv

Additional Data Loads







## Functional training workshop for Align business users

### Final requirements gathering for data mapping

Align Overview

Rules & Modelling Deep Dive

Requirements and gap analysis

Pre-Configured Sandbox used

How to set up assignment rules

Confirm user setup and data visibility

Overview of basic Align features

How to review the impact of rules on alignments

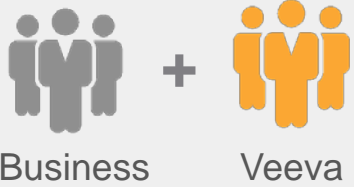
Identify additional CRM fields to map

Establish baseline knowledge for next phases

How to publish model and deal with rep feedback

Business Kick Off

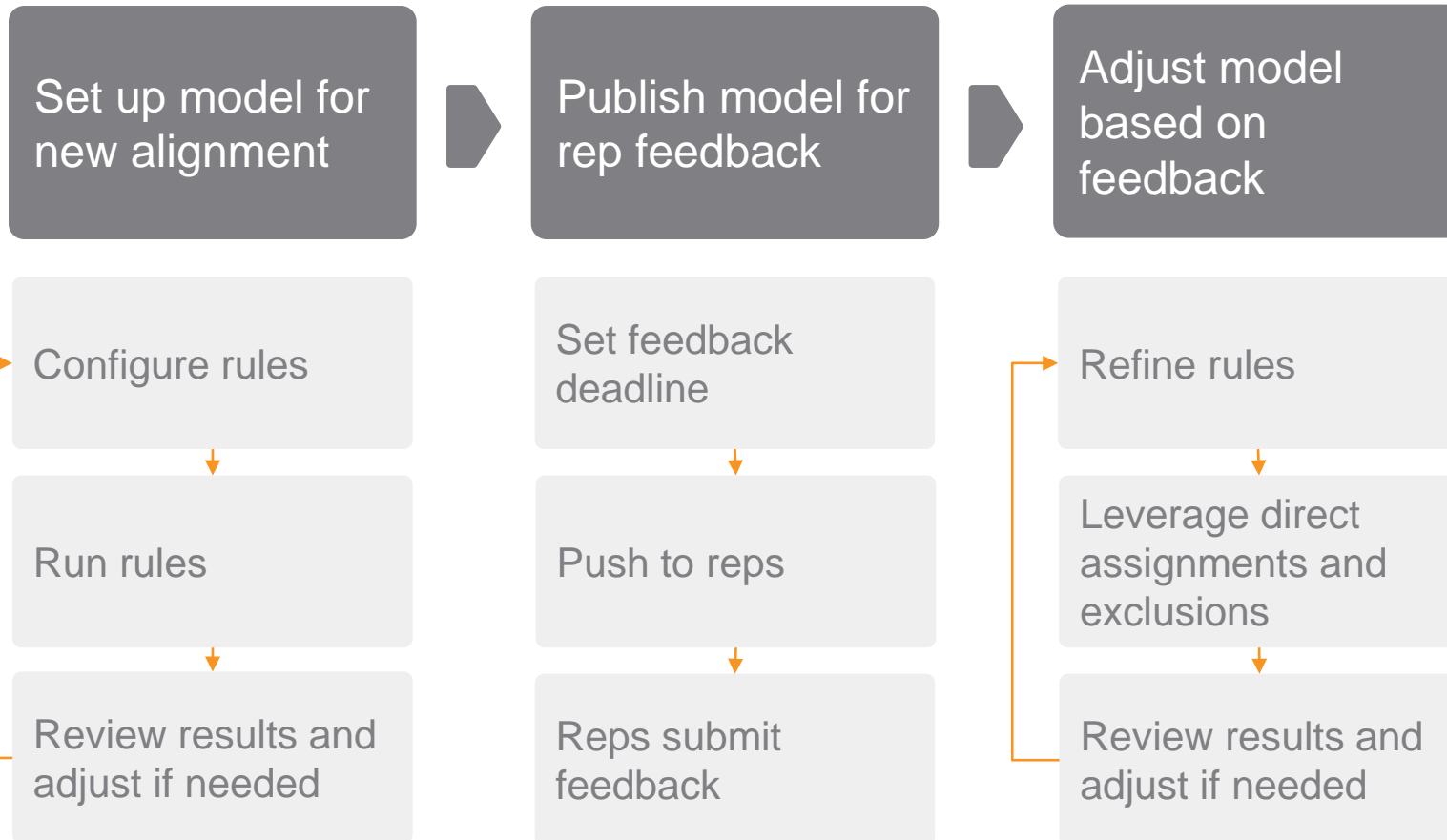


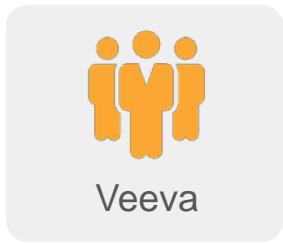


## Assignment Rules Created in the sandbox

Assignments tuned leveraging the Align UI and Rules Engine

**Modelling,  
Feedback &  
Refinement**





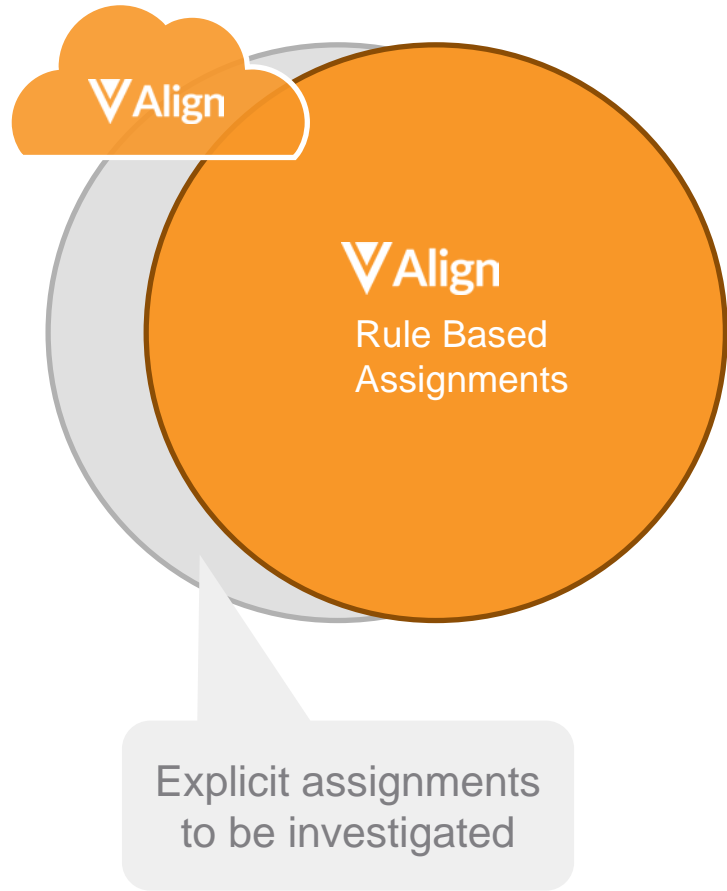
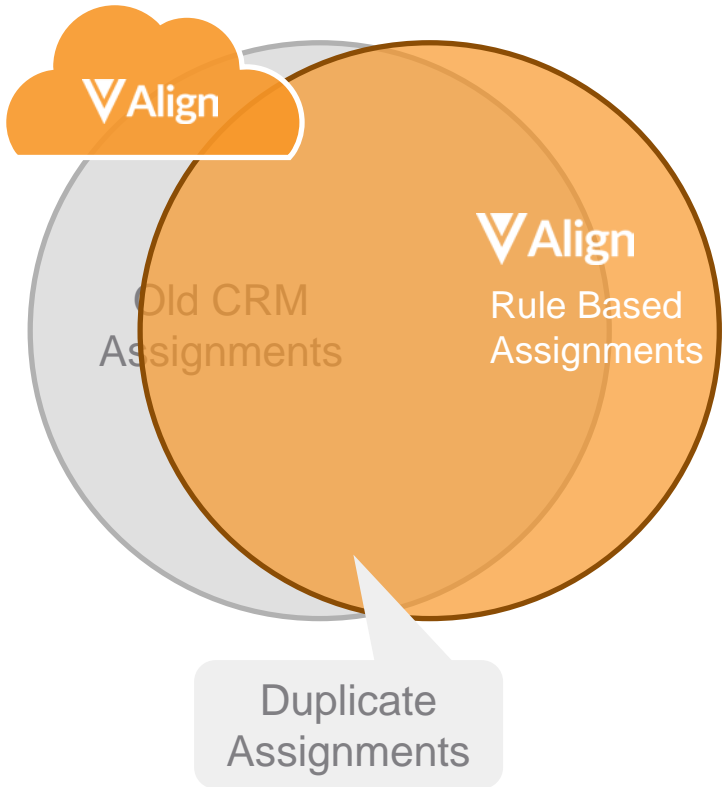
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End date any legacy duplicate alignments



Business

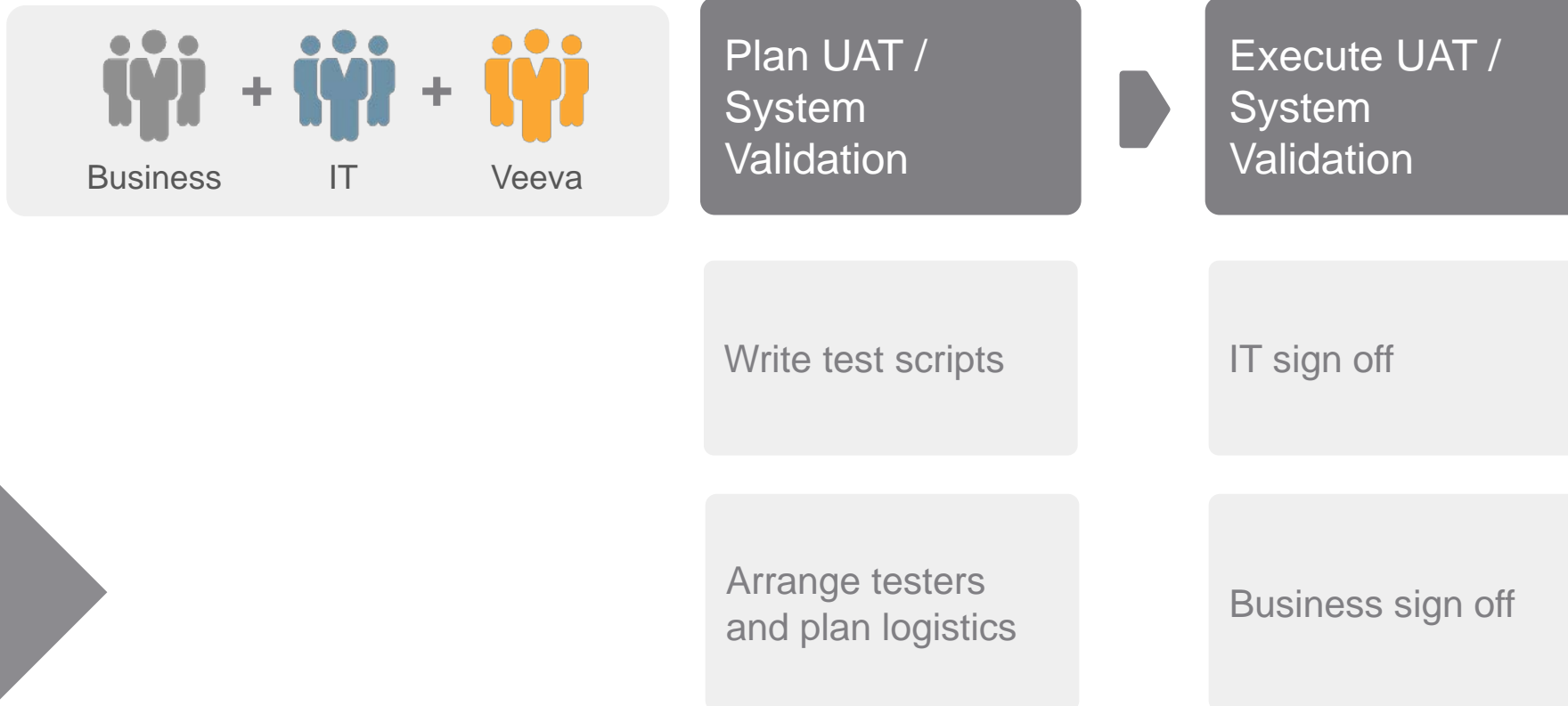
Review & approve final alignments

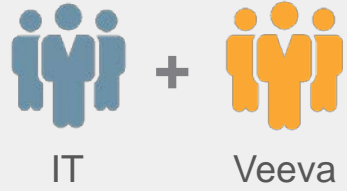


Clean up



# System Validation





## Migrate from Align/CRM sandbox to Production

Integrate Align  
Prod with CRM

Clean Up

Publish to CRM

Set up seamless  
integration

Remove any  
duplicate pre-  
existing alignments

Clean up legacy  
alignments in CRM

Perform data loads

Push new  
alignments from  
Align to CRM

Migrate alignment  
rules from SBX

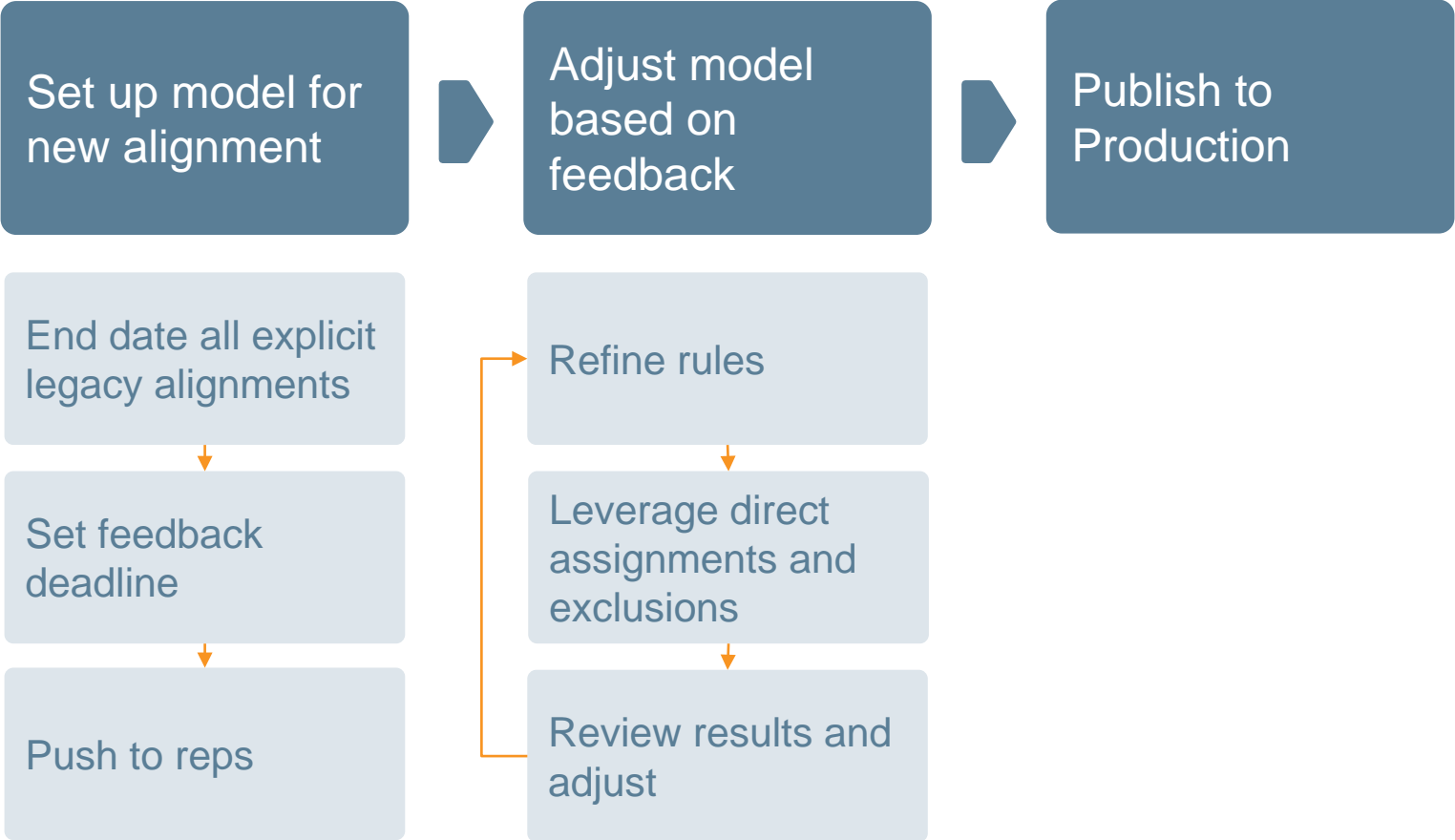
Deploy to  
Production



# Post Go-Live Clean Up



**Clean up remaining explicit assignments**  
**Leverage modelling and feedback**

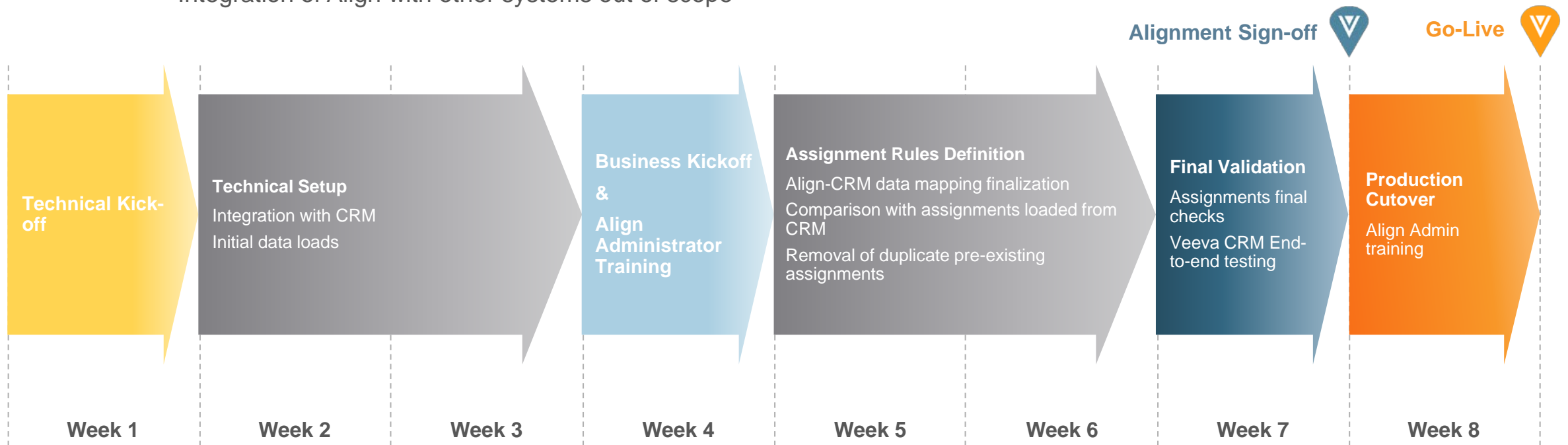




# European Align Pilot Implementation: Example Timeline

- Scenario:

- Customer already using Veeva CRM
- Up to 3 countries in scope
- Integration of Align with other systems out of scope







1 Build core Align configuration pattern

2 Deploy Align pattern to pilot Countries

3. Deploy Align to additional Countries in waves



Single Align Pattern covers all countries



Non-interruptive cutover



Adjust rules for additional countries



Mapped to CRM data model



Gather & Apply User Feedback



Cost Effective



# Does it matter when in the sales cycle Align is deployed?

Align can be deployed at any point in the Sales Cycle



**1**

Timed to coincide with a new cycle with new assignments & targets

**2**

Mid-cycle deployment leveraging CRM import





# Key Takeaways

- Set clear **success criteria** before starting (KPI's)
- Plan the deployment & cutover approach upfront and agree with all stakeholders
- Hold **technical IT workshop & set up the platform** before engaging with the business
- **Train the business early** in the project
- Enter UAT and go live with well trained users
- Leverage the **rules engine** and **modelling** to refine assignments during the project
- **Import all CRM legacy assignments** to avoid a gap at cutover
- Clean up any legacy assignments as a BAU activity



