

Veeva CRM Innovation Guide

Veeva CRM MyInsights



OVERVIEW

Veeva CRM MyInsights is a unique data visualization capability embedded within Veeva CRM. It instantly turns customer data into tailored insights at the point of planning and decision-making, driving better execution.

Veeva CRM MyInsights gives you the freedom to visualize data any way you want, helping to develop deeper and more meaningful customer relationships.

Key information is delivered via intuitive dashboards in Veeva CRM MyInsights in real time. By accessing all multichannel customer data in Veeva CRM, it surfaces the most important insights right when and where field teams need it. For example, as your representatives prepare for a call, they can quickly and easily access rich data visualizations that reveal physicians' preferred channels and messages.

Because Veeva CRM MyInsights is built for the needs of the field team, it enables greater organizational coordination and planning. Graphical representations of sales trends, including products and competitors over time, allow benchmarking of strategies against industry standards. Other team members, such as medical science liaisons, access an in-depth, visual summary of their key stakeholders' scientific leadership profile and history. This saves them hours that would otherwise be spent manually researching publications and clinical trial databases.

The growing library of pre-existing dashboards allows teams to visualize all relevant data directly on their mobile device, without the need for external synchronizations or data roundtrips. This includes order management, accounts, territories, KOL profiles, account planning, and more. Since Veeva CRM MyInsights is based on industry-standard HTML and JavaScript, companies can easily create or extend additional data visualizations, optimized for each role and activity. An ecosystem of certified partners can also develop advanced data visualizations that meet a company's unique requirements.

TIPS & TRICKS

› ROLLOUT PLAN

Develop a rollout plan. To make the most of Veeva CRM MyInsights, define each target audience and map out key points during business processes that can benefit by adding insights. Proactively survey sales, marketing, medical teams, and other relevant stakeholders about the most important information they need, so that your first set of reports are ready to go on launch day. Factor in usability and functionality testing by IT, to guarantee that users have instant access to every layer of content from their first use.

› DESIGN

Take a clean and simple approach to design. Help field teams quickly know what actions to take by creating visualizations that balance the right amount of information with actionable insights. Be sure to include items and language that your users are familiar with to support their specific business processes. The overall interface for each insight should be clean and straightforward, with visually intuitive pictures that tell a story and provide a clear call to action.

› PARTNERS

Consider partners with Veeva CRM MyInsights certification.

As part of the Veeva Partner Program, all partners are eligible to achieve CRM MyInsights certification. Certified technology, services, and content partners have received training and can immediately help you build a broad and extensive array of custom visualization reports, suited to your company's specific needs.

TIPS & TRICKS CONTINUED

➤ PRE-EXISTING DATA VISUALIZATIONS

Leverage existing dashboards. Veeva CRM MyInsights comes with a library of pre-existing dashboards that are great way to get you started on your CRM data visualization journey. These include useful views for order management, accounts, territories, KOL profiles, account planning, and much more. Once familiar with the initial dashboards, you can then begin to expand your data visualizations, either by creating your own or working with certified partners.



RESOURCES

Veeva CRM MyInsights resources

PRESS

- [Veeva CRM MyInsights Empowers Field Teams with Actionable Insights for Better Execution](#)

PARTNERS

- [Veeva CRM MyInsights provider ecosystem](#)

RESOURCES

- [Webpage](#)
- [Solution Brief](#)
- [Video](#)



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