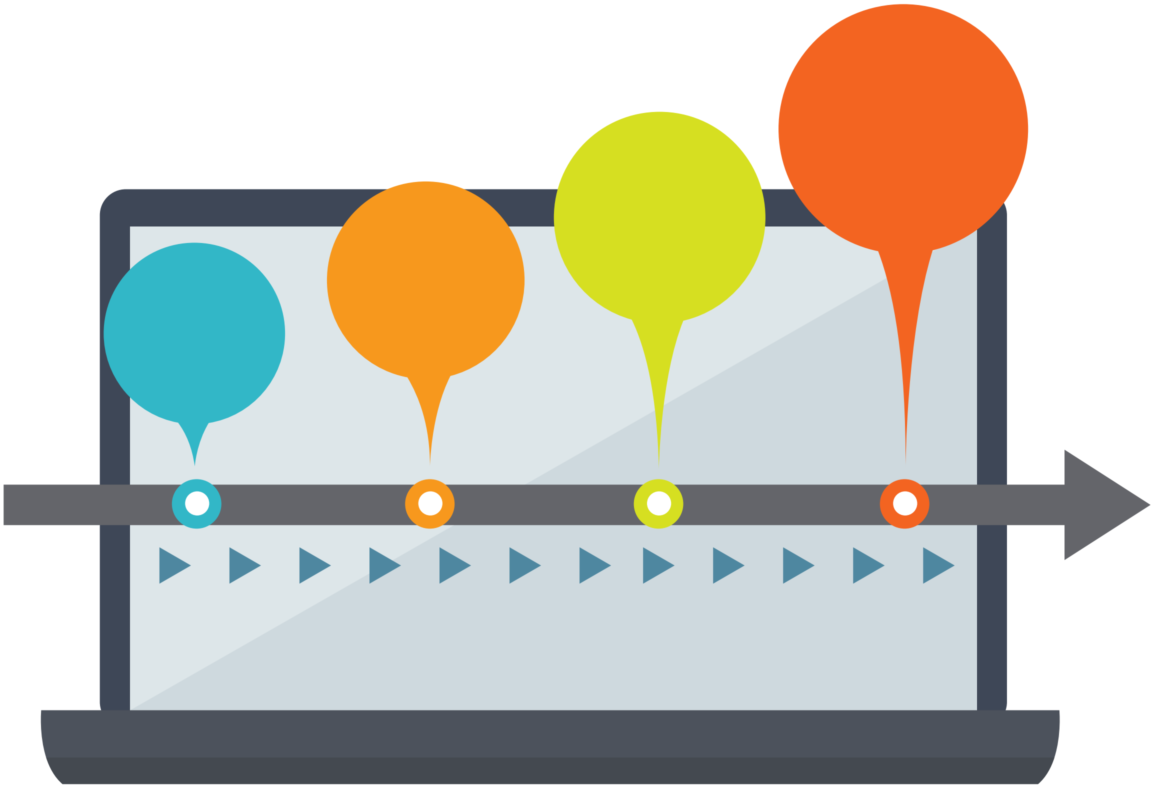
Veeva CRM Innovation Guide

# Veeva CRM Timeline View



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# OVERVIEW

Simplify your pre-call planning with Veeva CRM's timeline to see historical and planned activities with your customers in a single view.

The timeline view is a core capability within Veeva CRM that provides instant access to intuitively-formatted information about all previous and planned interactions with each customer. Field teams can target calls more effectively and build better relationships with physicians. Reps and MSLs no longer have to go to separate lists to find information about activities such as compliant emails, calls, medical events, medical inquiries, and much more.

The timeline view enables:

- More effective pre-call planning, as well as determining past call activity and plan objectives
- Information sharing and collaboration by viewing the activity of the entire organization with a healthcare provider
- Coaching and account reviews by sales managers

## Types of activity that can be displayed on the account timeline:

**Standard CRM channels**
- Calls
- Emails
- MSL activity
- Online meetings
- Inventory monitoring

**Scientific activity**
- Medical events
- Medical inquiries
- Clinical trial information
- Scientific publications

**Custom channels**
- Customer service calls
- Marketing mailings
- Other custom channels

# OVERVIEW CONTINUED



The timeline view displays all recent activities in reverse chronological order so you immediately understand what is new with each account. You view a summary of activities by month and then expand the month to display details about each activity in the timeline. If you choose, the timeline can also be configured as your primary landing page within Veeva CRM.

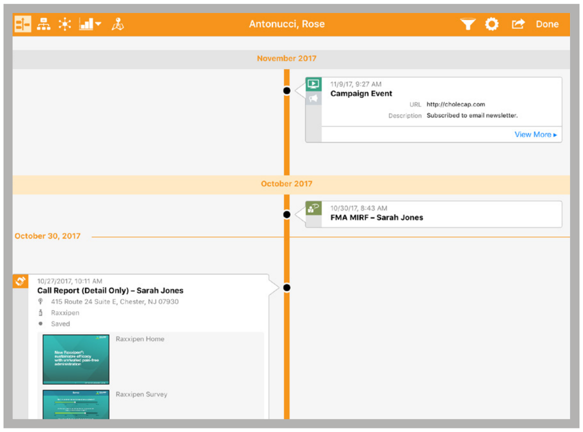
Available information in the timelines includes the type of call, whether samples were dropped, the address, what products were discussed, as well as thumbnails of the media content referenced in each call, and more. During pre-call planning, field teams now know what information have already been shared with providers, allowing them to determine what the next most important activities are.

Users can filter the timeline view items by product and activity type to instantly view only the information most relevant to them. Filtering dramatically improves user productivity in accounts with large numbers of activities across different teams and products.

In addition, your business rules determine the level of permissions any group has to view various activities, including such as emails sent to, medical events, clinical trial information, or publication details.

# TIPS & TRICKS

## 360 DEGREE CUSTOMER VIEWS




**Use the timeline view to give field reps a 360-degree view of every sales and marketing activity that impacts the account.** Now you can display not only standard CRM activities completed with Veeva CRM, but also marketing and other customer-facing activities, such as email blasts or website interactions. Veeva CRM accesses this information through direct integrations with the Salesforce Marketing Cloud, or customers can import information from any other systems using our robust API.

## SEE MOST RECENT ACTIVITIES

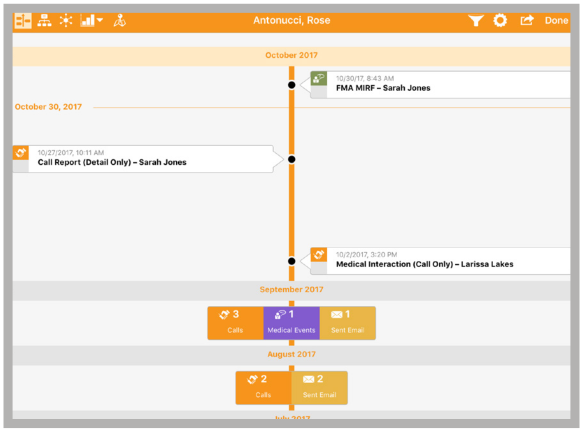
**Set the timeline view as the default view when the field reps access the account.** Doing this will immediately update reps on the most recent account activity, improving productivity by saving reps the time and effort of searching for the latest news.

## EVALUATE YOUR SHARING MODEL FOR ACCOUNT ACTIVITY

**To restrict sensitive information from being viewed, you can choose the level of visibility for other team member's activities.** Your organization should decide upfront what type of information is valuable to each group and what may be considered sensitive.

# TIPS & TRICKS CONTINUED

## › IDENTIFY POTENTIAL OPPORTUNITIES FOR LOADING NEW DATASETS




**Field teams benefit from viewing information that is not tracked in CRM.** Often, this data lives in siloed, external systems. With Veeva CRM, you have the opportunity to load new datasets and make them visible to your teams within the account timeline. Examples include marketing mailings, registrations for events, or activities managed in other systems. You can complete this using a one-time data load, or, if these are frequent updates, consider building an integration.

## › END USER TRAINING

**To make the most out of your timeline view, first assess its current usage with super users, then make a plan to ensure field team awareness.** You can refresh their knowledge by regularly communicating tips and tricks, as well as showcasing real examples where the timeline view has provided new insights or additional value to a user.

## › COACHING AND PRE-CALL PLANNING

**Some Veeva CRM customers have had great success using the timeline view as a coaching and pre-call planning tool, especially among first-line sales managers and their direct reports.** Consider educating your sales leads about this capability.



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